



**2022 NAHRO  
"Commissioner of the Year"**

Congratulations to  
Chair Dianna Payton for recognition as  
"Commissioner of the Year"  
at the  
NAHRO National Conference



**EAST BATON ROUGE PARISH  
HOUSING AUTHORITY**

**BOARD OF COMMISSIONERS**

**REGULAR BOARD MEETING**

**THURSDAY, SEPTEMBER 29, 2022**

**6:00 PM**

**CYPRESS PINCHBACK**

**501 GARDERE LANE**

**BATON ROUGE, LOUISIANA 70820**

Dianna Payton, Chair  
Tyra Banks, Vice-Chair  
Philip L. Smith, Jr., Second Vice-Chair  
Al Barron  
Chris Brown  
Lynn Farris  
Justin Gaudet



## **PUBLIC NOTICE**

**SEPTEMBER 26, 2022**

### **EAST BATON ROUGE PARISH HOUSING AUTHORITY**

### **BOARD OF COMMISSIONERS**

### **REGULAR BOARD MEETING**

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Notice is hereby given that the Regular Board Meeting will be held with the Board of Commissioners of the East Baton Rouge Parish Housing Authority as follows:

**Date:** Thursday, September 29, 2022

**Time:** 6:00 PM CST

**Location:** Cypress Pinchback  
501 Gardere Lane  
Baton Rouge, Louisiana 70820  
Community Room

A handwritten signature in blue ink, appearing to read 'J. Wesley Daniels, Jr.', is positioned to the left of the printed name and title.

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J. Wesley Daniels, Jr.  
Chief Executive Officer

*Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*



**BOARD OF COMMISSIONERS  
REGULAR BOARD MEETING**

Thursday, September 29, 2022

6:00 PM

Cypress Pinchback – 501 Gardere Lane  
Baton Rouge, Louisiana 70820

**AGENDA**

Call to Order

Roll Call

Invocation

Public Comments

1. Minutes – July 14, 2022 Regular Board Meeting
2. CEO Evaluation and Contract Amendment – Resolution No. 2022-12
3. FY 2022 Operating Budget – Resolution No. 2022-13
4. FY 2022 Housing Choice Voucher (HCV) / Project-Based Vouchers (PBV) Payment Standards – Resolution No. 2022-14
5. FY 2022 Public Housing Utility Allowance – Resolution No. 2022-15
6. FY 2022 Public Housing Flat Rents – Resolution No. 2022-16
7. Housing Choice Voucher – City of New Roads Permanent Transfer – Resolution No. 2022-17
8. Asset Repositioning: River South RAD – Resource Sharing Agreement – Resolution No. 2022-18
9. Vehicle Disposition – Resolution No. 2022-19
10. Chief Executive Officer Report
  - a. Executive Update
11. Departmental Reports
  - a. Chief Operating Officer Report
  - b. Financial Statements & Reports (June & July 2021)
  - c. Housing Choice Voucher Program
  - d. Affordable Housing
  - e. Capital Fund Program
  - f. Human Resources
12. BR Choice Neighborhood Report

*Mission Statement*

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13. Partners Southeast COO Report
14. New Business
15. Adjournment

*Mission Statement*

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## Agenda Item – No. 2

### Minutes – July 14, 2022 Regular Board Meeting

#### **Action:**

1. Approve the Minutes of the July 14, 2022 Regular Board Meeting

#### **Staff Resource(s):**

J. Daniels, Secretary/CEO  
April Downs, Chief of Staff

#### **External Resource(s):**

N/A

#### **Background/Explanation:**

Parliamentary Procedure

#### **Time Sensitivity:**

None

#### **Funding Source:**

N/A

#### **MWBE/DBE/Section 3:**

N/A

#### **Attachments:**

Transcribed Minutes

#### *Mission Statement*

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**MINUTES OF THE REGULAR MEETING AND PUBLIC HEARING OF THE BOARD OF  
COMMISSIONERS OF THE HOUSING AUTHORITY OF EAST BATON ROUGE PARISH MAIN  
OFFICE AT 4731 NORTH BOULEVARD  
JULY 14, 2022 AT 12:00 PM**

The Board of Commissioners for the Housing Authority of East Baton Rouge Parish convened in Regular Session on Thursday, July 14, 2022 at 12:00 pm in the main office located at 4731 North Boulevard.

**Meeting Called to Order**                      **Commissioner Dianna Payton, Chair**

**Invocation**                                      **Commissioner Chris Brown**

**Roll Call:**

**Members Present**                              **Commissioner Dianna Payton, Chair**  
   **Commissioner Tyra Banks, Vice-Chair**  
   **Commissioner Al Barron**  
   **Commissioner Chris Brown**

**Members Absent**                              **Commissioner Philip Smith, Jr., Second Vice Chair**  
   **Commissioner Lynn Farris**  
   **Commissioner Justin Gaudet**

**QUORUM PRESENT**

**Public Comments**

Commissioner Payton asked if there were any public comments. None were voiced. Public comment period was closed.

**AGENDA ITEM NUMBER 1:**

**APPROVAL OF THE MINUTES OF THE REGULAR MEETING OF THE EAST BATON ROUGE PARISH HOUSING AUTHORITY HELD MAY 12, 2022.**

Motion was made by Commissioner Barron to approve the minutes for the regular meeting held on May 12, 2022, and Commissioner Brown seconded the motion. No abstentions or oppositions were noted. No further discussion was made.

**MOTION PASSED**

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**AGENDA ITEM NUMBER 2:  
CAPITAL FUND LOAN COMMITMENT- NORTH BOULEVARD ACQUISITION  
RESOLUTION NO. 2022 – 11**

Mr. Daniels presented the item and noted that the Capital Fund Loan Commitment will be a loan to Partners Southeast from the Housing Authority. Mr. Daniels further explained that Partners Southeast will then use some of those proceeds to function as equity for the acquisition of 4550 and 4560 North Boulevard. In addition, a loan from Liberty Bank has been obtained to secure the acquisition, which is projected to close in late August. Mr. Daniels further noted that our operational strategy is to keep the tenants in place at the property which is approximately 53,000 square feet. The majority of the tenants are within the three-story medical office building that sits on the west side of the site, which is approximately 50% occupied. The east side of the property, 4560 is under a 99-year ground lease that does not propose any type of risk to development, with 40 years remaining, expiring in 2062; with a monthly ground lease fee of \$2,000. He further noted that our redevelopment strategy is to first develop a 76-unit senior deal; that which would facilitate the relocation of our Sharlo residents. Commissioner Barron made a motion to approve, and Commissioner Banks seconded the motion. No abstentions or oppositions were noted. No further discussion was made.

**MOTION PASSED**

**AGENDA ITEM NUMBER 3:  
CHIEF EXECUTIVE OFFICER REPORT  
A. EXECUTIVE UPDATE**

Mr. Daniels noted that Commissioner Payton was reappointed to the board for another five-year term and that equally as important, Commissioner Brown was awarded Commissioner of the Year by Southwest NAHRO. Mr. Daniels further discussed the matter of the Employee Retention Credit. He noted that the agency could not participate because we are a political subdivision of the state. Mr. DeCuir also noted that specifically all political subdivisions, state government, and local government municipalities are excluded. Mr. Daniels noted that there is an opportunity for Partners Southeast to obtain the credit, given that it is a non-profit. He further noted that we are progressing in efforts of playing a supplemental role with New Roads; that our intention is to take over the program permanently in January 2023. He continued stating that the agency received awards at the Southwest NAHRO including Special Accomplishment by Agency, due to our partnership with EBR schools, the Tech-ready Program, providing our families with laptops, WIFI's and Google tablets, the Nan McKay Scholarship, and the Single Accomplishment by an Employee. Mr. Daniels further discussed that there has been turnover in some positions and commended the leadership team for stepping up. Commissioner Payton asked if there were any questions. None were voiced.

This concluded the report.

## **AGENDA ITEM NUMBER 4: DEPARTMENTAL REPORTS**

The departmental reports were included in the board packets distributed to the board members prior to the board meeting.

### **A. CHIEF OPERATING OFFICER REPORT B. FINANCIAL STATEMENTS & REPORTS (APRIL/MAY 2022)**

Mr. Daniels presented the April and May 2022 financials. Discussion was made regarding employee retirement, time accrual payout and operations. Commissioner Payton asked if there were any further questions about finance. None were voiced.

This concluded the report.

### **C. HOUSING CHOICE VOUCHER PROGRAM D. AFFORDABLE HOUSING E. CAPITAL FUND PROGRAM F. HUMAN RESOURCES**

The departmental reports were included in the board packets distributed to the board members prior to the board meeting. No further questions were voiced.

## **AGENDA ITEM NUMBER 5: BR CHOICE NEIGHBORHOOD REPORT**

The departmental reports were included in the board packets distributed to the board members prior to the board meeting.

## **AGENDA ITEM NUMBER 6: PARTNERS SOUTHEAST COO REPORT**

The departmental reports were included in the board packets distributed to the board members prior to the board meeting. No further questions were voiced.

## **AGENDA ITEM NUMBER 7: NEW BUSINESS**

No new business was addressed.

*Mission Statement  
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**AGENDA ITEM NUMBER 8:  
ADJOURNMENT**

**MEETING ADJOURNED**

**APPROVED:**

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**Dianna Payton  
Chair  
East Baton Rouge Parish Housing Authority**

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**J. Wesley Daniels, Jr.  
Secretary/Chief Executive Officer  
East Baton Rouge Parish Housing Authority**

*Mission Statement*

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## Agenda Item – No. 2

### CEO Evaluation and Contract Amendment

#### **Action:**

1. Approve Resolution No. 2022-12 to accept the recommendation of the Executive Committee and approve the amendment of the employment contract for J. Wesley Daniels, Jr. as Chief Executive Officer.

#### **Staff Resource(s):**

J. Daniels, CEO

#### **External Resource(s):**

EBRPHA Board of Directors

EBRPHA Executive Committee

DeCuir, Adams & Clark

#### **Background/Explanation:**

At the September 2019 Board Meeting, the EBRPHA Board approved the employment contract for the CEO, J. Daniels.

The EBRPHA Evaluation Committee performed its annual evaluation of Mr. Daniels as EBRPHA CEO. Based upon results on this evaluation, the Executive Committee will seek approval of the recommendations related to Mr. Daniels employment contract.

#### **Time Sensitivity:**

Moderate

#### **Funding Source:**

COCC

Other sources

#### **MWBE/DBE/Section 3:**

DeCuir, Adams & Clark – MWBE Firm

#### **Attachments:**

Resolution No. 2022-12

#### *Mission Statement*

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## **Resolution Number 2022-12**

### **Approval of the Chief Executive Officer's Employment Contract Amendment**

**BE IT KNOWN** that on the 29<sup>th</sup> day of September 2022 the Board of Commissioners of the Housing Authority of East Baton Rouge Parish, with Administrative Office located at 4731 North Boulevard, in the City of Baton Rouge, Parish of East Baton Rouge, adopted the following Resolution.

**WHEREAS**, the Housing Authority of East Baton Rouge Parish is responsible for the proper operation of its Public Housing and Housing Choice Voucher Programs; and

**WHEREAS**, at the September 2019 Board Meeting, the EBRPHA Board approved the employment contract for J. Wesley Daniels, Jr. as Chief Executive Officer for East Baton Rouge Parish Housing Authority and Partners Southeast.

**WHEREAS**, the EBRPHA Evaluation Committee performed its annual evaluation of Mr. Daniels. Based upon results on this evaluation, the Executive Committee recommended acceptance and approval, by the EBRPHA Board, for amendments to certain provisions within the employment contract related to compensation.

**NOW THEREFORE, BE IT RESOLVED**, by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish accepted and approved the recommendations of the Executive Committee.

**NOW THEREFORE, BE IT FURTHER RESOLVED**, by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish amended certain provisions within the employment contract related to compensation to include the following: Salary increase of \_\_\_\_\_ percent (\_\_\_\_%).

I, hereby, certify that the foregoing is a true copy of a Resolution adopted by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish at the Regular Meeting held on the 29<sup>th</sup> day of September 2022. I further certify that a quorum of the members of the Board of Commissioners was present and that this Resolution was adopted by a Vote of \_\_\_\_ Yeas; \_\_\_\_ Nays; \_\_\_\_ Abstained.

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Dianna Payton  
Chair

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J. Wesley Daniels, Jr.  
Secretary/Chief Executive Officer

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## Agenda Item – No. 3

### FY 2023 Operating Budget

#### **Action:**

1. Approve Resolution No. 2022-13 for the EBRPHA Operating Budget including AMPs, COCC and Housing Choice Voucher Program for Fiscal Year 2023, ending September 30, 2023

#### **Staff Resource(s):**

J. Daniels, CEO

Carlton Brown, Finance

April Downs, Chief of Staff

Janie Anderson, Housing Choice

Ivra Amacker, Affordable Housing & HR

#### **External Resource(s):**

HUD

#### **Background/Explanation:**

HUD requires the Board to approve the Operating Budget for the Low Rent Public Housing Program and the Housing Choice Voucher Program for Fiscal Year Ending September 30, 2023, in accordance with HUD-52574, PHA Board Resolution – Approving Operating Budget which includes HCV and AMP budgets.

#### **Time Sensitivity:**

Immediate – Fiscal year commences October 1, 2022

#### **Funding Source:**

COCC

Housing Choice Program Administrative Fee

Public Housing/AMP Tenant Rents/Subsidy

Capital Fund

Developer Fees

Other Misc. Sources

#### **MWBE/DBE/Section 3:**

Various vendors, landlords and consultants

#### **Attachments:**

Operating Budgets: COCC, AMPs, HCV (*under separate cover*)

Salary Schedules (*under separate cover*)

Form HUD-52574 PHA Board Resolution

Resolution No. 2022-13

#### *Mission Statement*

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**PHA Board Resolution**  
Approving Operating Budget

**U.S. Department of Housing  
and Urban Development**  
Office of Public and Indian Housing -  
Real Estate Assessment Center (PIH-REAC)

OMB No. 2577-0026  
(exp. 06/30/2022)

**Public reporting burden** for this collection of information is estimated to average **10 minutes 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. This agency may not collect this information, and you are not required to complete this form, unless it displays a currently valid OMB control number.

This information is required by Section 6(c)(4) of the U.S. Housing Act of 1937. The information is the operating budget for the low-income public housing program and provides a summary of the proposed/budgeted receipts and expenditures, approval of budgeted receipts and expenditures, and justification of certain specified amounts. HUD reviews the information to determine if the operating plan adopted by the public housing agency (PHA) and the amounts are reasonable, and that the PHA is in compliance with procedures prescribed by HUD. Responses are required to obtain benefits. This information does not lend itself to confidentiality.

PHA Name: East Baton Rouge Parish Housing Authority      PHA Code: LA003

PHA Fiscal Year Beginning: 10/01/2022      Board Resolution Number: 2022-13

Acting on behalf of the Board of Commissioners of the above-named PHA as its Chairperson, I make the following certifications and agreement to the Department of Housing and Urban Development (HUD) regarding the Board's approval of (check one or more as applicable):

DATE

- ☒ Operating Budget approved by Board resolution on: 09/29/2022  
Including all Public Housing AMS, HCV and COCC
- ☐ Operating Budget submitted to HUD, if applicable, on:
- ☐ Operating Budget revision approved by Board resolution on:
- ☐ Operating Budget revision submitted to HUD, if applicable, on:

I certify on behalf of the above-named PHA that:

1. All statutory and regulatory requirements have been met;
2. The PHA has sufficient operating reserves to meet the working capital needs of its developments;
3. Proposed budget expenditure are necessary in the efficient and economical operation of the housing for the purpose of serving low-income residents;
4. The budget indicates a source of funds adequate to cover all proposed expenditures;
5. The PHA will comply with the wage rate requirement under 24 CFR 968.110(c) and (f); and
6. The PHA will comply with the requirements for access to records and audits under 24 CFR 968.110(i).

I hereby certify that all the information stated within, as well as any information provided in the accompaniment herewith, if applicable, is true and accurate.

**Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012.31, U.S.C. 3729 and 3802)

Print Board Chairperson's Name:	Signature:	Date:
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## **Resolution Number 2022-13**

### **Approval of the East Baton Rouge Parish Housing Authority Public Housing Operating Budget for All Projects and Housing Choice Voucher Program Budget for Fiscal Year Ending September 30, 2023**

**BE IT KNOWN**, that on the 29<sup>th</sup> day of September 2022, the Board of Commissioners of the Housing Authority of East Baton Rouge Parish, with Administrative Office located at 4731 North Boulevard, in the City of Baton Rouge, Parish of East Baton Rouge, adopted the following Resolution.

**WHEREAS**, the Housing Authority of East Baton Rouge Parish is responsible for its proper operation of its Public Housing Program for all projects and Housing Choice Voucher Program in accordance with rules and regulations set by the U.S. Department of Housing and Urban Development; and

**WHEREAS**, the U.S. Department of Housing and Urban Development (HUD) requires the Commissioners of the Housing Authority of East Baton Rouge Parish to approve the Operating Budget for the Low Rent Public Housing Program and the Housing Choice Voucher Program for Fiscal Year Ending September 30, 2023, in accordance to Form HUD-52574, Board Resolution Approving the AMP Budgets.

**NOW, THEREFORE, BE IT RESOLVED**, by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish has reviewed and approved the proposed Low Rent Public Housing Operating Budget and Housing Choice Voucher Program Budget for Fiscal Year Ending September 30, 2023.

**BE IT FURTHER RESOLVED** that the Low-Rent Public Housing Program Operating Budget for all Projects and the Housing Choice Voucher Program Budget for Fiscal Year Ending September 30, 2023 are hereby approved and the Chairman is authorized to execute the PHA Board Resolution, and the Chief Executive Officer, if required, may submit said budgets to the U.S. Department of Housing and Urban Development, as appropriate.

I, hereby, certify that the foregoing is a true copy of a Resolution adopted by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish at the Regular Meeting held on the 29<sup>th</sup> day of September 2022. I further certify that a quorum of the members of the Board of Commissioners was present and that this Resolution was adopted by a Vote of \_\_\_\_ Yeas; \_\_\_\_ Nays; \_\_\_\_ Abstained.

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Dianna Payton  
Chair

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J. Wesley Daniels, Jr.  
Secretary/Chief Executive Officer

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## Agenda Item – No. 4

### FY 2023 Housing Choice Voucher (HCV)/Project-Based Voucher (PBV) Payment Standards

#### **Action:**

1. Approve Resolution No. 2022-14 for the EBRPHA Housing Choice Voucher (HCV) and Project-Based Voucher (PBV) Payment Standards, effective October 1, 2022

#### **Staff Resource(s):**

J. Daniels, CEO

Janie Anderson, Housing Choice

Doris Mejia, Housing Choice

Carlton Brown, Finance

#### **External Resource(s):**

HUD

#### **Background/Explanation:**

The Voucher Payment Standards are set in conjunction with the U.S. Department of Housing and Urban Development (HUD) changes in the Fair Market Rents (FMR) for Federal Fiscal Year 2023, published effective October 1, 2022.

EBRPHA desires to set the Voucher Payment Standards for non-VASH participants at 110% of the current published FMRs for East Baton Rouge Parish and City of Plaquemine, in accordance with the attached Schedule of Income Limits, Fair Market Rents, and Payment Standards.

EBRPHA desires to set the Payment Standards for VASH participants at 120% of FMR. This is the highest we can use for VASH. We do not need HUD approval to utilize 120% for VASH. This increase is part of the VASH regulation and encouraged by HUD and VA to help veterans find housing.

#### **Time Sensitivity:**

Immediate – effective October 1, 2022

#### **Funding Source:**

Housing Choice Voucher

#### **MWBE/DBE/Section 3:**

N/A

#### **Attachments:**

EBRPHA Schedule of Income Limits, Fair Market Rents and Payment Standards

EBRPHA HCV Program – FMR and Payment Standard History

HUD FY 2021 Fair Market Rent (FMR) – East Baton Rouge Parish MSA

HUD FY 2021 Fair Market Rent (FMR) – Iberville Parish MSA

Resolution No. 2022-14

#### *Mission Statement*

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Housing Authority of East Baton Rouge Parish (LA003)  
Housing Choice Voucher and Public Housing Programs

Income Limits for Baton Rouge, LA HUD Metro FMR Area								
	1-Person	2-Person	3-Person	4-Person	5-Person	6-Person	7-Person	8-Person
<b>Extremely Low-Income</b>	\$18,650	\$21,300	\$23,950	\$27,750	\$32,470	\$37,190	\$41,910	\$46,630
<b>Very Low-Income</b>	\$31,050	\$35,500	\$39,950	\$44,350	\$47,900	\$51,450	\$55,000	\$58,550
<b>Low-Income</b>	\$49,700	\$56,800	\$63,900	\$70,950	\$76,650	\$82,350	\$88,000	\$93,700
<i>Effective: 4/18/2022</i>				<i>Median Family Income: \$88,900</i>				

Fair Market Rents (FMR's) for Housing Choice Voucher Program						
	0-BR Unit	1-BR Unit	2-BR Unit	3-BR Unit	4-BR Unit	5-BR Unit
<i>Effective: 10/1/2022</i>	\$859	\$876	\$1,005	\$1,266	\$1,644	\$1,890

Non-VASH Payment Standards (PS) for Housing Choice Voucher Program							Non-VASH Vouchers Only
	0-BR Unit	1-BR Unit	2-BR Unit	3-BR Unit	4-BR Unit	5-BR Unit	
Effective: 10/1/2022	\$944	\$963	\$1,105	\$1,392	\$1,808	\$2,079	
PS as % of FMR	110%						

VASH Payment Standards (PS) for Housing Choice Voucher Program							VASH Vouchers Only
	0-BR Unit	1-BR Unit	2-BR Unit	3-BR Unit	4-BR Unit	5-BR Unit	
Effective: 10/1/2022	\$1,030	\$1,051	\$1,206	\$1,519	\$1,972	\$2,268	
PS as % of FMR	120%						

**EAST BATON ROUGE PARISH ONLY**



**EBRPHA HCV Program - FMR and PS History**
**Baton Rouge MSA**

	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
FY2023 FMR	859	876	1005	1266	1644	1890
FY2022 FMR	744	781	917	1161	1447	1664
FY2021 FMR	794	856	1013	1290	1583	1820
FY2020 FMR	678	765	894	1145	1429	1643
FY2019 FMR	719	849	981	1259	1567	1802
FY2018 FMR	647	789	906	1155	1459	1677
FY2017 FMR	604	742	856	1084	1360	1564
FY2016 FMR	594	728	842	1056	1331	1530
FY2015 FMR	548	669	797	993	1144	1316

**NON-VASH PAYMENT STANDARDS**

	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	%FMR	
FY2023 PS	944	963	1105	1392	1808	2079	110	eff 10/1/22
FY2022 PS	818	859	1008	1277	1591	1830	110	eff 10/1/21 return to 110%
FY2021 PS	794	941	1114	1290	1583	1820	1&2B=110, all others 100	eff 10/1/20
FY2020 PS	745	841	983	1259	1572	1807	110	eff 10/1/19 return to 110%
FY2019 PS	754	891	1030	1321	1645	1892	105	eff 10/1/18 reduce to 105%
FY2018 PS	711	867	996	1270	1604	1844	110	eff 11/1/17 return to 110%
FY2018 PS	776	946	1087	1386	1750	2012	120	eff 10/1/17
FY2017 PS	724	890	1027	1300	1632	1876	120	eff 1/12/17 post-flood
FY2016 PS	653	800	826	1161	1464	1683	110	eff 1/23/16 pre-flood
FY2015 PS	603	736	877	1093	1259	1448	110	eff 12/1/14

**Impact of 2016 Flood**

	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	%FMR	
FY2018 PS	711	867	996	1270	1604	1844	110	eff 11/1/17
FY2016 PS	653	800	826	1161	1464	1683	110	eff 1/23/16 pre-flood
	58	67	170	109	140	161	110	increase from pre-flood PS

**Payment Standards Schedule - EBRPHA Housing Choice Voucher Program**

Effective: 10/1/2022 (FY2023)

Baton Rouge MSA							
Column	Action Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
A	FMR eff 10/1/22	\$ 859	\$ 876	\$ 1,005	\$ 1,266	\$ 1,644	\$ 1,890
B	Non-VASH PS at 110% FMR eff 10/1/22	\$ 944	\$ 963	\$ 1,105	\$ 1,392	\$ 1,808	\$ 2,079
C	VASH PS at 120% FMR eff 10/1/22	\$ 1,030	\$ 1,051	\$ 1,206	\$ 1,519	\$ 1,972	\$ 2,268

Column	Action Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
1	FMR eff 10/1/22	\$ 859	\$ 876	\$ 1,005	\$ 1,266	\$ 1,644	\$ 1,890	
2	FMR eff 10/1/21	\$ 744	\$ 781	\$ 917	\$ 1,161	\$ 1,447	\$ 1,664	AVG CHANGE
3	Amount Change	\$ 115	\$ 95	\$ 88	\$ 105	\$ 197	\$ 226	\$ 138
4	Percentage Change	15%	12%	10%	9%	14%	14%	12%
Non-VASH Payment Standards	PS eff 10/1/22	\$ 944	\$ 963	\$ 1,105	\$ 1,392	\$ 1,808	\$ 2,079	
	PS eff 10/1/21	\$ 818	\$ 859	\$ 1,008	\$ 1,277	\$ 1,591	\$ 1,830	AVG CHANGE
	Amount Change	\$ 126	\$ 104	\$ 97	\$ 115	\$ 217	\$ 249	\$ 151
	Percentage Change	15%	12%	10%	9%	14%	14%	12%
VASH Payment Standards	PS eff 10/1/22	\$ 1,030	\$ 1,051	\$ 1,206	\$ 1,519	\$ 1,972	\$ 2,268	
	PS eff 9/1/22	\$ 892	\$ 937	\$ 1,100	\$ 1,393	\$ 1,736	\$ 1,996	AVG CHANGE
	Amount Change	\$ 138	\$ 114	\$ 106	\$ 126	\$ 236	\$ 272	\$ 165
	Percentage Change	15%	12%	10%	9%	14%	14%	12%

Housing Authority of East Baton Rouge Parish (LA003)  
Housing Choice Voucher and Public Housing Programs

Income Limits for Iberville Parish								
	1-Person	2-Person	3-Person	4-Person	5-Person	6-Person	7-Person	8-Person
<b>Extremely Low-Income</b>	\$13,590	\$18,310	\$23,030	\$27,750	\$32,470	\$36,900	\$39,450	\$42,000
<b>Very Low-Income</b>	\$22,300	\$25,450	\$28,650	\$31,800	\$34,350	\$36,900	\$39,450	\$42,000
<b>Low-Income</b>	\$35,650	\$40,750	\$45,850	\$50,900	\$55,000	\$59,050	\$63,150	\$67,200
<i>Effective: 4/18/2022</i>				<i>Median Family Income: \$63,600</i>				

Fair Market Rents (FMR's) for Housing Choice Voucher Program						
	0-BR Unit	1-BR Unit	2-BR Unit	3-BR Unit	4-BR Unit	5-BR Unit
<i>Effective: 10/1/2022</i>	\$687	\$708	\$800	\$1,137	\$1,308	\$1,504

Non-VASH Payment Standards (PS) for Housing Choice Voucher Program							Non-VASH Vouchers Only
	0-BR Unit	1-BR Unit	2-BR Unit	3-BR Unit	4-BR Unit	5-BR Unit	
<i>Effective: 10/1/2022</i>	\$755	\$778	\$880	\$1,250	\$1,438	\$1,654	
PS as % of FMR	110%						

VASH Payment Standards (PS) for Housing Choice Voucher Program							VASH Vouchers Only
	0-BR Unit	1-BR Unit	2-BR Unit	3-BR Unit	4-BR Unit	5-BR Unit	
<i>Effective: 10/1/2022</i>	\$824	\$849	\$960	\$1,364	\$1,569	\$1,804	
PS as % of FMR	120%						

CITY OF PLAQUEMINE ONLY

**City of Plaquemine (Iberville Parish)**

	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
FY2023 FMR	687	708	800	1137	1308	1504
FY2022 FMR	604	630	742	1016	1135	1305
FY2021 FMR	642	700	815	1093	1261	1450
FY2020 FMR	542	624	710	911	1072	1232
FY2019 FMR	560	663	759	951	1191	1369

**NON-VASH PAYMENT STANDARDS**

	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	%FMR	
FY2023 PS	755	778	880	1250	1438	1654	110	eff 10/1/22
FY2022 PS	664	693	816	1117	1248	1435	110	eff 10/1/21 increase to 110%
FY2021 PS	642	700	815	1093	1261	1450	100	eff 10/1/20
FY2020 PS	596	686	781	1002	1179	1355	110	eff 10/1/19 increase to 110%
FY2019 PS	560	663	759	951	1191	1369	100	

**Payment Standards Schedule - EBRPHA Housing Choice Voucher Program**

Effective: 10/1/2022 (FY2023)

City of Plaquemine (Iberville Parish)							
Column	Action Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
A	FMR eff 10/1/22	\$ 687	\$ 708	\$ 800	\$ 1,137	\$ 1,308	\$ 1,504
B	Non-VASH PS at 110% FMR eff 10/1/22	\$ 755	\$ 778	\$ 880	\$ 1,250	\$ 1,438	\$ 1,654
C	VASH PS at 120% FMR eff 10/1/22	\$ 824	\$ 849	\$ 9,660	\$ 1,364	\$ 1,569	\$ 1,804

Column	Action Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
1	FMR eff 10/1/22	\$ 687	\$ 708	\$ 800	\$ 1,137	\$ 1,308	\$ 1,504	
2	FMR eff 10/1/21	\$ 604	\$ 630	\$ 742	\$ 1,016	\$ 1,135	\$ 1,305	AVG
3	Amount Change	\$ 83	\$ 78	\$ 58	\$ 121	\$ 173	\$ 199	CHANGE
4	Percentage Change	14%	12%	8%	12%	15%	15%	\$ 119
Non-VASH Payment Standards	PS eff 10/1/22	\$ 755	\$ 778	\$ 880	\$ 1,250	\$ 1,438	\$ 1,654	13%
	PS eff 10/1/21	\$ 664	\$ 693	\$ 816	\$ 1,117	\$ 1,248	\$ 1,435	AVG
	Amount Change	\$ 91	\$ 85	\$ 64	\$ 133	\$ 190	\$ 219	CHANGE
	Percentage Change	14%	12%	8%	12%	15%	15%	\$ 130
VASH Payment Standards	PS eff 10/1/22	\$ 824	\$ 849	\$ 960	\$ 1,364	\$ 1,569	\$ 1,804	13%
	PS eff 9/1/22	\$ 724	\$ 756	\$ 890	\$ 1,219	\$ 1,362	\$ 1,566	AVG
	Amount Change	\$ 100	\$ 93	\$ 70	\$ 145	\$ 207	\$ 238	CHANGE
	Percentage Change	14%	12%	8%	12%	15%	15%	\$ 142

## VASH PROGRAM PAYMENT STANDARDS

Baton Rouge MSA							
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	%FMR
FY2023 PS	1030	1051	1206	1519	1972	2268	120
FY2022 PS	892	937	1100	1393	1736	1996	120

City of Plaquemine (Iberville Parish)							
	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	%FMR
FY2023 PS	824	849	960	1364	1569	1804	120
FY2022 PS	724	756	890	1219	1362	1566	120



# FY 2023 FAIR MARKET RENT DOCUMENTATION SYSTEM

## The FY 2023 Baton Rouge, LA HUD Metro FMR Area FMRs for All Bedroom Sizes

Final FY 2023 & Final FY 2022 FMRs By Unit Bedrooms					
Year	Efficiency	One-Bedroom	Two-Bedroom	Three-Bedroom	Four-Bedroom
FY 2023 FMR	\$859	\$876	\$1,005	\$1,266	\$1,644
FY 2022 FMR	\$744	\$781	\$917	\$1,161	\$1,447

East Baton Rouge Parish, LA is part of the Baton Rouge, LA HUD Metro FMR Area, which consists of the following counties: Ascension Parish, LA; East Baton Rouge Parish, LA; East Feliciana Parish, LA; Livingston Parish, LA; Pointe Coupee Parish, LA; St. Helena Parish, LA; West Baton Rouge Parish, LA; and West Feliciana Parish, LA. All information here applies to the entirety of the Baton Rouge, LA HUD Metro FMR Area.

### Fair Market Rent Calculation Methodology

[Show/Hide Methodology Narrative](#)

Fair Market Rents for metropolitan areas and non-metropolitan FMR areas are developed as follows:

1. **Calculate the Base Rent:** HUD uses 2016-2020 5-year American Community Survey (ACS) estimates of 2-bedroom adjusted standard quality gross rents calculated for each FMR area as the new basis for FY2023, provided the estimate is statistically reliable. For FY2023, the test for reliability is whether the margin of error for the estimate is less than 50% of the estimate itself and whether the ACS estimate is based on at least 100 survey cases. HUD does not receive the exact number of survey cases, but rather a categorical variable known as the count indicator indicating a range of cases. An estimate based on at least 100 cases corresponds to a count indicator of 4 or higher.

If an area does not have a reliable 2016-2020 5-year estimate, HUD checks whether the area has had at least 1 minimally reliable estimate in any of the past 3 years, or estimates that meet the 50% margin of error test described above. If so, the FY2023 base rent is the average of the inflated ACS estimates.

If an area has not had a minimally reliable estimate in the past 3 years, HUD uses the estimate for the area's corresponding metropolitan area (if applicable) or State non-metropolitan area as the basis for FY2023.

2. **Calculate the Basis for Recent Mover Adjustment Factor:** HUD has changed the calculation of the FY2023 Recent Mover Factor from previous years due to the unavailability of ACS<sub>2020</sub> 1-year estimates. The Census Bureau did not release standard 1-year estimates from the 2020 American Community Survey (ACS) due to the impacts of the COVID-19 pandemic on data collection. For FY2023, HUD uses a multi-pronged approach that includes private sources of rental data.

In order to calculate rents that are "as of" 2020, HUD takes the average of the recent mover factor from 1-year ACS<sub>2019</sub> recent mover rent inflated by 2019-2020 gross rent change; and the factor from 5-year ACS<sub>2020</sub> recent mover rent. For areas where private data is available, the 2019-2020 gross rent change uses a weighted average of private sources and the Consumer Price Index (CPI) to calculate the annual percentage change in rents plus utilities from annual 2019 to annual 2020. For areas where private data is not available, the 2019-2020 gross rent change is based only on the CPI.

3. **Adjust for Inflation:** In order to calculate rents that are "as of" 2021, for areas where private data is available, HUD calculates the relevant (regional or local) change in gross rent inflation using a weighted



# FY 2023 FAIR MARKET RENT DOCUMENTATION SYSTEM

## The FY 2023 Iberville Parish, LA HUD Metro FMR Area FMRs for All Bedroom Sizes

Final FY 2023 & Final FY 2022 FMRs By Unit Bedrooms					
Year	Efficiency	One-Bedroom	Two-Bedroom	Three-Bedroom	Four-Bedroom
FY 2023 FMR	\$687	\$708	\$800	\$1,137	\$1,308
FY 2022 FMR	\$604	\$630	\$742	\$1,016	\$1,135

Iberville Parish, LA is part of the Iberville Parish, LA HUD Metro FMR Area, which consists of the following counties: Iberville Parish, LA. All information here applies to the entirety of the Iberville Parish, LA HUD Metro FMR Area.

### Fair Market Rent Calculation Methodology

[Show/Hide Methodology Narrative](#)

Fair Market Rents for metropolitan areas and non-metropolitan FMR areas are developed as follows:

1. **Calculate the Base Rent:** HUD uses 2016-2020 5-year American Community Survey (ACS) estimates of 2-bedroom adjusted standard quality gross rents calculated for each FMR area as the new basis for FY2023, provided the estimate is statistically reliable. For FY2023, the test for reliability is whether the margin of error for the estimate is less than 50% of the estimate itself and whether the ACS estimate is based on at least 100 survey cases. HUD does not receive the exact number of survey cases, but rather a categorical variable known as the count indicator indicating a range of cases. An estimate based on at least 100 cases corresponds to a count indicator of 4 or higher.

If an area does not have a reliable 2016-2020 5-year estimate, HUD checks whether the area has had at least 1 minimally reliable estimate in any of the past 3 years, or estimates that meet the 50% margin of error test described above. If so, the FY2023 base rent is the average of the inflated ACS estimates.

If an area has not had a minimally reliable estimate in the past 3 years, HUD uses the estimate for the area's corresponding metropolitan area (if applicable) or State non-metropolitan area as the basis for FY2023.

2. **Calculate the Basis for Recent Mover Adjustment Factor:** HUD has changed the calculation of the FY2023 Recent Mover Factor from previous years due to the unavailability of ACS<sub>2020</sub> 1-year estimates. The Census Bureau did not release standard 1-year estimates from the 2020 American Community Survey (ACS) due to the impacts of the COVID-19 pandemic on data collection. For FY2023, HUD uses a multi-pronged approach that includes private sources of rental data.

In order to calculate rents that are "as of" 2020, HUD takes the average of the recent mover factor from 1-year ACS<sub>2019</sub> recent mover rent inflated by 2019-2020 gross rent change; and the factor from 5-year ACS<sub>2020</sub> recent mover rent. For areas where private data is available, the 2019-2020 gross rent change uses a weighted average of private sources and the Consumer Price Index (CPI) to calculate the annual percentage change in rents plus utilities from annual 2019 to annual 2020. For areas where private data is not available, the 2019-2020 gross rent change is based only on the CPI.

3. **Adjust for Inflation:** In order to calculate rents that are "as of" 2021, for areas where private data is available, HUD calculates the relevant (regional or local) change in gross rent inflation using a weighted average of private data sources and the Consumer Price Index (CPI) from annual 2020 to annual 2021. For



## **Resolution Number 2022-14**

### **Approving New Voucher Payment Standards for the Housing Choice Voucher Program for the East Baton Rouge Housing Authority, Effective October 1, 2022**

**BE IT KNOWN**, that on the 29<sup>th</sup> day of September 2022, the Board of Commissioners of the Housing Authority of East Baton Rouge Parish, with Administrative Office located at 4731 North Boulevard, in the City of Baton Rouge, Parish of East Baton Rouge, adopted the following Resolution.

**WHEREAS** the Housing Authority of East Baton Rouge Parish is responsible for the proper operation of its Housing Choice Voucher Program; and

**WHEREAS**, the Voucher Payment Standards, according to HUD regulations, are to be no more than 110% and not less than 90% of the current published Fair Market Rents; and

**WHEREAS**, it has been determined that the Voucher Payment Standards be set in conjunction with the U.S. Department of Housing and Urban Development (HUD) changes in the Fair Market Rents (FMR) for Federal Fiscal Year 2023, published effective October 1, 2022; and

**WHEREAS**, the Housing Authority of East Baton Rouge Parish desires to set the Voucher Payment Standards for non-VASH participants at 110% of the current published FMRs East Baton Rouge Parish and City of Plaquemine, in accordance with the attached Schedule of Income Limits, Fair Market Rents, and Payment Standards.

**WHEREAS**, the Housing Authority of East Baton Rouge Parish desires to set the Voucher Payment Standards for VASH participants at 120% of the current published FMRs East Baton Rouge Parish and City of Plaquemine, in accordance with the attached Schedule of Income Limits, Fair Market Rents, and Payment Standards.

**NOW, THEREFORE BE IT RESOLVED**, by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish that the new Voucher Payment Standards be approved in accordance with regulations, effective October 1, 2022.

I, hereby, certify that the foregoing is a true copy of a Resolution adopted by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish at the Regular Meeting held on the 29<sup>th</sup> day of September 2022. I further certify that a quorum of the members of the Board of Commissioners was present and that this Resolution was adopted by a Vote of \_\_\_\_\_ Yeas; \_\_\_\_\_ Nays; and \_\_\_\_\_ to Abstain.

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Dianna Payton  
Chair

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J. Wesley Daniels, Jr.  
Secretary/Chief Executive Officer

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*

## Agenda Item – No. 5

### FY 2023 Public Housing Utility Allowance

#### **Action:**

1. Approve Resolution No. 2022-15 for the EBRPHA Public Housing Utility Allowances, effective October 1, 2022

#### **Staff Resource(s):**

J. Daniels, CEO

Ivra Amacker, Affordable Housing

Nicole Huval, Affordable Housing

Carlton Brown, Finance

#### **External Resource(s):**

HUD

#### **Background/Explanation:**

EBRPHA is required by Federal regulations to review each year, the cost of utilities and adjust the allowances for utilities provided to residents of its Public Housing Program.

Staff has determined the overall change for utilities during the last twenty-four (24) months (a waiver was approved for FY2021) has changed more than ten percent (10%) and revision to the utility allowance is required for the Public Housing Program.

#### **Time Sensitivity:**

Immediate – effective October 1, 2022

#### **Funding Source:**

Public Housing

#### **MWBE/DBE/Section 3:**

N/A

#### **Attachments:**

EBRPHA Public Housing Utility Allowance Schedule

Resolution No. 2022-15

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*



HOUSING AUTHORITY OF EAST  
BATON ROUGE PARISH FY2023  
Utility Allowances

Utility Allowances Effective October 1, 2022	Monte Sano Village	Clarksdale	Duane Street	Turner Plaza	Ardenwood Village	Kelly Terrace	Wood Plaza	Zion Terrace	Capitol Square	Scotland Villa	Sharlo Terrace
	3-1	3-2	3-4	3-5	3-6	3-8	3-9	3-11	3-13	3-14	3-15
<b>OBR</b>				<b>\$ 147</b>							<b>\$ 147</b>
<b>1BR</b>	<b>\$ 158</b>	<b>\$ 158</b>		<b>\$ 159</b>	<b>\$ 158</b>	<b>\$ 158</b>	<b>\$ 158</b>	<b>\$ 158</b>	<b>\$ 159</b>		<b>\$ 159</b>
<b>2BR</b>	<b>\$ 200</b>	<b>\$ 200</b>	<b>\$ 188</b>	<b>\$ 200</b>	<b>\$ 198</b>	<b>\$ 200</b>	<b>\$ 200</b>	<b>\$ 200</b>	<b>\$ 200</b>	<b>\$ 200</b>	
<b>3BR</b>	<b>\$ 255</b>	<b>\$ 255</b>	<b>\$ 242</b>		<b>\$ 253</b>	<b>\$ 255</b>	<b>\$ 255</b>	<b>\$ 255</b>	<b>\$ 255</b>	<b>\$ 255</b>	
<b>4BR</b>	<b>\$ 310</b>	<b>\$ 310</b>	<b>\$ 295</b>		<b>\$ 308</b>	<b>\$ 310</b>	<b>\$ 310</b>	<b>\$ 310</b>	<b>\$ 310</b>	<b>\$ 310</b>	

## **Resolution Number 2022-15**

### **Approval of the Revised Utility Allowances for the Public Housing Program for the East Baton Rouge Parish Housing Authority, Effective October 1, 2022**

**BE IT KNOWN**, that on the 29<sup>th</sup> day of September 2022, the Board of Commissioners of the Housing Authority of East Baton Rouge Parish, with Administrative Office located at 4731 North Boulevard, in the City of Baton Rouge, Parish of East Baton Rouge, adopted the following Resolution.

**WHEREAS**, the Housing Authority of East Baton Rouge Parish is required by Federal regulations to review each year, the cost of utilities and adjust the allowances for utilities provided to residents of its Public Housing Program accordingly to said adjustments; and

**WHEREAS**, the staff of the Housing Authority of the East Baton Rouge Parish has determined the overall cost for utilities during the last twelve (12) months has changed more than fifty percent (50%), and revision to the utility allowance is required for the Public Housing Program; and

**WHEREAS**, public comments are not required to be solicited from the residents of the East Baton Rouge Parish Housing Authority in accordance with HUD rules and regulations.

**NOW, THEREFORE BE IT RESOLVED**, the Board of Commissioners of the Housing Authority of East Baton Rouge Parish that the revised utility allowances for all Public Housing Program residents are approved, effective October 1, 2022.

I, hereby, certify that the foregoing is a true copy of a Resolution adopted by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish at the Regular Meeting held on the 29<sup>th</sup> day of September 2022. I further certify that a quorum of the members of the Board of Commissioners was present and that this Resolution was adopted by a Vote of \_\_\_\_ Yeas; \_\_\_\_ Nays; \_\_\_\_ Abstained.

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Dianna Payton  
Chair

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J. Wesley Daniels, Jr.  
Secretary/Chief Executive Officer

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*

## Agenda Item – No. 6

### FY 2023 Public Housing Flat Rents

#### **Action:**

1. Approve Resolution No. 2022-16 for the EBRPHA Public Housing Flat Rents, effective October 1, 2022

#### **Staff Resource(s):**

J. Daniels, CEO

Ivra Amacker, Affordable Housing

Nicole Huval, Affordable Housing

Carlton Brown, Finance

#### **External Resource(s):**

HUD

#### **Background/Explanation:**

EBRPHA is required by HUD to establish, implement, and maintain a Flat Rent Policy to offer as a rent option to families who participate in the Public Housing Program.

Staff has revised its Flat Rent Schedule in accordance with policies and procedures as required by HUD regulation. Flat rents must be no less than 80% of FMRs less tenant paid utilities.

#### **Time Sensitivity:**

Immediate – effective October 1, 2022

#### **Funding Source:**

N/A

#### **MWBE/DBE/Section 3:**

N/A

#### **Attachments:**

EBRPHA Flat Rent Schedule

HUD FY 2023 Fair Market Rent (FMR) – East Baton Rouge Parish MSA

Resolution No. 2022-16

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*



HOUSING AUTHORITY OF EAST  
BATON ROUGE PARISH FY2023  
FLAT RENTS

Flat Rents Effective October 1, 2022	Monte Sano Village		Duane Street	Turner Plaza	Ardenwood Village	Kelly Terrace	Wood Plaza	Zion Terrace	Capitol Square	Scotland Villa	Sharlo Terrace
	3-1	3-2	3-4	3-5	3-6	3-8	3-9	3-11	3-13	3-14	3-15
<b>0BR</b>				<b>\$ 687</b>							<b>\$ 540</b>
<b>1BR</b>	<b>\$ 701</b>	<b>\$ 685</b>		<b>\$ 685</b>	<b>\$ 685</b>	<b>\$ 685</b>	<b>\$ 685</b>	<b>\$ 685</b>	<b>\$ 542</b>		<b>\$ 542</b>
<b>2BR</b>	<b>\$ 804</b>	<b>\$ 810</b>	<b>\$ 645</b>	<b>\$ 810</b>	<b>\$ 810</b>	<b>\$ 810</b>	<b>\$ 810</b>	<b>\$ 810</b>	<b>\$ 603</b>	<b>\$ 603</b>	
<b>3BR</b>	<b>\$ 1,013</b>	<b>\$ 1,032</b>	<b>\$ 850</b>		<b>\$ 1,032</b>	<b>\$ 1,032</b>	<b>\$ 1,032</b>	<b>\$ 1,032</b>	<b>\$ 757</b>	<b>\$ 915</b>	
<b>4BR</b>	<b>\$ 1,315</b>	<b>\$ 1,266</b>	<b>\$ 1,020</b>		<b>\$ 1,266</b>	<b>\$ 1,266</b>	<b>\$ 1,266</b>	<b>\$ 1,266</b>	<b>\$ 1,004</b>	<b>\$ 1,139</b>	

## **Resolution Number 2022-16**

### **Approval of the Flat Rents Schedule for the Public Housing Program for the East Baton Rouge Parish Housing Authority, Effective October 1, 2022**

**BE IT KNOWN**, that on the 29<sup>th</sup> day of September 2022, the Board of Commissioners of the Housing Authority of East Baton Rouge Parish, with Administrative Office located at 4731 North Boulevard, in the City of Baton Rouge, Parish of East Baton Rouge, adopted the following Resolution.

**WHEREAS** the Housing Authority of East Baton Rouge Parish is required by the U.S. Department of Housing and Urban Development (HUD) to establish, implement, and maintain a Flat Rent Policy to offer as a rent option to families who participate in the Public Housing Program; and

**WHEREAS**, the Housing Authority of East Baton Rouge Parish Housing Authority has revised its Flat Rent Schedule in accordance with policies and procedures as required by the U.S. Department of Housing and Urban Development; and

**NOW, THEREFORE BE IT RESOLVED**, by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish authorizes the Chief Executive Officer to implement the Flat Rent Schedule for the Public Housing Program, effective October 1, 2022.

I, hereby, certify that the foregoing is a true copy of a Resolution adopted by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish at the Regular Meeting held on the 29<sup>th</sup> day of September 2022. I further certify that a quorum of the members of the Board of Commissioners was present and that this Resolution was adopted by a Vote of \_\_\_\_ Yeas; \_\_\_\_ Nays; \_\_\_\_ Abstained.

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Dianna Payton  
Chair

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J. Wesley Daniels, Jr.  
Secretary/Chief Executive Officer

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*

## Agenda Item – No. 7

### Housing Choice Voucher – City of New Roads Permanent Transfer

#### **Action:**

1. Approve Resolution No. 2022-17 authorizing the CEO to negotiate and enter into a contract of the City of New Roads HCV Program for the permanent transfer of Housing Choice Voucher (HCV) Program, effective January 1, 2023.

#### **Staff Resource(s):**

**J. Daniels, CEO**

Janie Anderson, Housing Choice

Doris Meija, Housing Choice

Carlton Brown, Finance

#### **External Resource(s):**

HUD

City of New Roads

#### **Background/Explanation:**

The City of New Roads informed HUD of their intent to relinquish their HCV Program. Total program includes approximately forty-seven (47) vouchers. Per HUD, the City of New Roads must identify a housing authority, in good standing, and would be interested in the permanent transfer. EBRPHA received correspondence from the City of New Roads to administer the HCV Program. There is a HUD-prescribed process that must be adhered to which can range from 90-120 days. Staff working through the process for voluntary transfer of City of New Roads' HCV program. The effective date for permanent transfer is January 1, 2023. Currently, New Roads Housing Authority has sixty-two (62) PH units and approximately forty-seven (47) Housing Choice Vouchers. Along with permanently taking over the New Roads HCV program there is the potential opportunity for redeveloping the 62 PH units. This supports our regional, housing choice strategy.

#### **Time Sensitivity:**

Immediate - HUD only allows HCV program transfers to occur in January and July of each year.

#### **Funding Source:**

HCV Program – City of New Roads

#### **MWBE/DBE/Section 3:**

N/A

#### **Attachments:**

Resolution No. 2022-17

Letter of Intent - City of New Roads

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*



## **Resolution Number 2022-17**

### **Authorization to Negotiate and Execute Agreement with City of New Roads for the Transfer for the Housing Choice Voucher Program**

**BE IT KNOWN** that on the 29<sup>th</sup> day of September 2022, the Board of Commissioners of the Housing Authority of East Baton Rouge Parish, with Administrative Office located at 4731 North Boulevard, in the City of Baton Rouge, Parish of East Baton Rouge, adopted the following Resolution.

**WHEREAS**, the City of New Roads informed HUD of their intent to relinquish their Housing Choice Voucher (HCV) Program. The total HCV program includes approximately forty-seven (47) vouchers; and

**WHEREAS**, HUD informed the City of New Roads of the requirement to identify a housing authority, in good standing, that would be interested in the permanent transfer; and

**WHEREAS**, the East Baton Rouge Parish Housing Authority (EBRPHA) and the City of New Roads desires to enter into an agreement for the permanent transfer of the City of New Roads Housing Choice Voucher (HCV) Program to EBRPHA, effective January 1, 2023.

**NOW, THEREFORE BE IT RESOLVED**, that the Board of Commissioners for the Housing Authority of the Parish of East Baton Rouge hereby authorizes the negotiation and execution by the CEO of an agreement between the East Baton Rouge Parish Housing Authority and the City of New Roads.

I, hereby, certify that the foregoing is a true copy of a Resolution adopted by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish at the Regular Meeting held on the 29<sup>th</sup> day of September 2022. I further certify that a quorum of the members of the Board of Commissioners was present and that this Resolution was adopted by a Vote of \_\_\_\_ Yeas; \_\_\_\_ Nays; \_\_\_\_ Abstained.

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Dianna Payton  
Chair

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J. Wesley Daniels, Jr.  
Secretary/Chief Executive Officer

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*



OFFICE OF THE MAYOR  
*Cornell Dukes*

April 12, 2022

Mr. Thomas A. Nelson  
Interim Executive Director  
Housing Authority of New Roads  
151 Cherry Street  
New Roads, Louisiana 70760

Re: Notice of Termination of Housing Choice Voucher  
(Section 8) Program Management with The Housing Authority of New Roads


Dear Mr. Nelson:

Notice is hereby given the City of New Roads will terminate the management of Housing Choice Voucher (Section 8) program with the Housing Authority of New Roads effective April 15, 2022. All Section 8 files held by the Housing Authority for New Roads are to be returned to the City of New Roads or its new management agency on or before April 18, 2022.

Should you have any questions regarding this, please let me know.

With kind regards, I remain.

Sincerely,

  
Cornell Dukes  
Mayor

CD:lhv

cc: Elvettra N. Gibbs, Director, Public Housing

## Agenda Item – No. 8

### Asset Repositioning: River South RAD Resource Sharing Agreement

#### **Action:**

1. Approve Resolution No. 2022-18 to authorize execution of the Resource Sharing Agreement between East Baton Rouge Parish Housing Authority and East Baton Rouge Parish Housing Authority Holdings, Inc.

#### **Staff Resource(s):**

J. Daniels, CEO

Ivra Amacker, Affordable Housing

Nicole Huval, Affordable Housing

April Downs, Chief of Staff

#### **External Resource(s):**

HUD

DeCuir, Clark, & Adams

#### **Background/Explanation:**

The EBRPHA team has crafted a Resource Sharing Agreement between EBRPHA and EBRP Housing Authority Holdings, Inc. to provide management and maintenance services to RAD-converted properties.

The Resource Sharing Agreement establishes the parameters for which EBRP Housing Authority Holdings, Inc. will reimburse EBRPHA for use of management staff, maintenance staff, equipment, repairs, management fees and other expenses.

#### **Time Sensitivity:**

Immediate – Agreement effective once River South Phase I converts to Project-Based Voucher through Rental Assistance Demonstration program on September 30, 2022

#### **Funding Source:**

HUD

#### **MWBE/DBE/Section 3:**

N/A

#### **Attachments:**

EBRPHA-EBRP Housing Authority Holdings, Inc. Resource Sharing Agreement  
Resolution No. 2022-18

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*

**RESOURCE SHARING AGREEMENT**  
(EBRP Housing Authority Holdings, Inc.)

THIS RESOURCE SHARING AGREEMENT (the “Agreement”) is effective as of \_\_\_\_\_, 2021 by and between the East Baton Rouge Parish Housing Authority of the City of Baton Rouge, LA, a Louisiana public body and body corporate and politic (“EBRPHA”) and EBRP Housing Authority Holdings, Inc. a non-profit corporation and wholly owned subsidiary of East Baton Rouge Parish Housing Authority (“EBRPHA”).

**Witness That:**

WHEREAS EBRP Housing Authority Holdings, Inc. desires to utilize the skills of certain officers and other employees of EBRPHA in carrying out EBRP Housing Authority Holdings, Inc.’s business activities.

WHEREAS the parties hereto intend that EBRP Housing Authority Holdings, Inc. will compensate EBRPHA for the utilization of its officers and other employees upon the terms and conditions of this Agreement.

WHEREAS EBRP Housing Authority Holdings, Inc. desires to utilize the skills of certain officers and other employees of EBRPHA for administrative services such as accounting, human resources, janitorial, maintenance, clerical, secretarial, etc; and

NOW, THEREFORE, in consideration of the mutual covenants contained herein, EBRPHA and EBRP Housing Authority Holdings, Inc. agree as follows:

1. EBRPHA Staff. EBRPHA and EBRP Housing Authority Holdings, Inc. shall mutually agree upon and designate in writing those staff members of EBRPHA who shall be assigned to EBRP Housing Authority Holdings, Inc. to engage in the day-to-day business of EBRP Housing Authority Holdings, Inc. from time to time (each an “Assigned Staff Person”). EBRPHA and EBRP Housing Authority Holdings, Inc. shall agree upon and designate the percentage of time that an Assigned Staff Person will work for EBRP Housing Authority Holdings, Inc. on an annual basis (the “EBRP Percentage”). Both parties agree that Assigned Staff Persons do not become employees of EBRP Housing Authority Holdings, Inc. as a result of this Agreement. EBRP Housing Authority Holdings, Inc. shall have no obligation to be responsible for payment of any federal, state, or local taxes for said employees that might arise out of this Agreement and said responsibilities shall remain with EBRPHA.
2. Invoicing and Payment. As a precondition for payment for services and reimbursement of fees, costs, and expenses arising hereunder, EBRPHA shall submit invoices to EBRP Housing Authority Holdings, Inc. on a monthly basis showing which Assigned Staff Person performed services for EBRP Housing Authority Holdings, Inc, the nature of the services performed, and reimbursable expenses as described in Section 5 below. EBRP Housing Authority Holdings, inc. shall remit payment within twenty (30) days unless the parties mutually agree upon a shorter period.
3. Compensation.
  - a. Reimbursement. EBRP Housing Authority Holdings, Inc. shall reimburse EBRPHA for the services provided pursuant to this Agreement in accordance with the following calculations. EBRPHA shall multiply the EBRP Percentage by (i) the Assigned Staff Person’s rate of compensation and (ii) the Assigned Staff Person’s benefits to determine the amount that EBRP Housing Authority Holdings, Inc. would owe to EBRPHA for use of the Assigned Staff Person’s services on a monthly basis. Maintenance Cost will be calculated utilizing labor plus materials which would equal the actual cost the EBRP Housing Authority Holdings, Inc. would owe to

EBRPHA for the use of the Maintenance Staff and supplies.

- b. Management Fee. In addition to reimbursing EBRPHA for the cost of salaries and benefits as provided above in Section 3.a., EBRP Housing Authority Holdings, Inc. shall pay EBRPHA for its administrative and management services a fee to be agreed upon in writing every year by the parties' respective boards. Recognizing that there are and will be some unknown factors in determining the level of such services, the fee is subject to adjustment by mutual agreement. As of the effective date, the management fee shall be equal to eight percent 8% of the payments described in Section 3.a above.
  - c. Service Fees. EBRP Housing Authority Holdings, Inc. shall pay EBRPHA a share of the Service Fees received for its service activities as determined by the parties on a deal-by-deal basis.
4. Reimbursable Expenses. EBRPHA shall include the following reimbursable expenses with its monthly invoices to EBRP Housing Authority Holdings, Inc.:
- a. long distance telephone calls between employees of EBRPHA on behalf of EBRP Housing Authority Holdings, Inc. and other parties related to the performance of this Agreement.
  - b. handling, shipping, mailing, courier, and reproduction of materials related to performance of this Agreement.
  - c. transportation, mileage costs, tolls, meals and lodging costs when traveling in connection with the performance of this Agreement.
  - d. Information Technology, IT helpdesk, software and computer equipment related to performance of this agreement.
  - e. all other reasonable direct costs incurred on behalf of EBRP Housing Authority Holdings, Inc. related to performance of this Agreement.
5. Term. This Agreement shall take effect as of the date of its execution by EBRPHA and EBRP Housing Authority Holdings, Inc. and will continue until it is terminated in accordance with its terms.
6. Termination for Cause.
- a. If, through any cause, EBRP Housing Authority Holdings, Inc. shall fail to fulfill in a timely and proper fashion its obligations under this Agreement, or if EBRP Housing Authority Holdings, Inc. shall violate any of the covenants, agreements, or stipulations of this Agreement, EBRPHA shall thereupon have the right to terminate this Agreement by giving written notice to EBRP Housing Authority Holdings, Inc. of such termination and specifying the effective date thereof, at least thirty (30) days prior to the effective date of such termination.
  - b. If, through any cause, EBRPHA shall fail to fulfill in a timely and proper fashion its obligations under this Agreement, or if EBRPHA shall violate any of the covenants, agreements, or stipulations of this Agreement, EBRP Housing Authority Holdings, Inc shall thereupon have the right to terminate this Agreement by giving written notice to EBRPHA of such termination and specifying the effective date thereof, at least thirty (30) days prior to the effective date of such termination.
7. Termination for Convenience. EBRPHA may terminate this Agreement, in whole or in part, for EBRPHA's convenience. Any such termination shall be affected by delivery to EBRP Housing Authority Holdings, Inc. of a Notice of Termination for Convenience specifying the extent to which the performance of the work under the Agreement is terminated. The Notice of Termination for Convenience shall be effective immediately upon receipt by EBRP Housing Authority Holdings, Inc.

8. Compliance with HUD Regulations. EBRP Housing Authority Holdings, Inc. and EBRPHA shall comply with all applicable provisions of the Consolidated Annual Contributions Contract between EBRPHA and HUD, HUD Regulations, HUD Notices, and all federal, state and local laws, ordinances and executive orders.
9. Entire Agreement. This Agreement shall constitute the entire agreement between the parties and no other warranties, inducements, considerations, promises, or interpretations shall be implied or impressed upon this Agreement that are not expressly addressed herein and therein.
10. Counterparts. This Agreement may be comprised of several identical counterparts, each to be fully executed by the parties and each to be deemed an original having identical legal effect.
11. Amendments. No changes, amendments, modifications, or discharge of this Agreement, or any part thereof shall be valid unless in writing and signed by the authorized agent of EBRP Housing Authority Holdings, Inc. and by the duly authorized representative of EBRPHA.
12. Governing Law. This Agreement shall be governed as to performance and interpretation in accordance with federal laws and the laws of the State of Louisiana. In the event of any dispute between the parties, venue is properly laid in East Baton Rouge Parish for any state court action and in the Eastern District of Louisiana for any federal court action.
13. Severability. If any provision of this Agreement shall be held or deemed to be inoperative or unenforceable because it conflicts with any other provision or provisions hereof such circumstances shall not have the effect of rendering any other provision or provisions herein contained invalid, inoperative, or unenforceable. The invalidity of any one or more phrases, sentences, clauses, or sections contained in this Agreement shall not affect the remaining portions of this Agreement or any part thereof.
14. Non-Assignment. The rights and responsibilities of the parties to this Agreement may not be assigned without the prior written consent of the non-assigning party.
15. Binding Effect. All of the terms and conditions of this Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective legal representatives, successors, transferees and permitted assigns.
16. Indemnification.
  - a. EBRPHA agrees to be responsible to protect, defend, keep, save, and hold EBRP Housing Authority Holdings, Inc. its directors, officers, employees, agents and subcontractors free and harmless from and against all liabilities, losses, penalties, damages, settlements, environmental liability, costs, charges, costs incurred in connection with responding to internal and external investigations, professional fees (including attorneys' fees) or other expenses or liabilities of every kind, nature and character arising out of or relating to any and all claims, liens, demands, obligations, actions, suits, judgments, or settlements, proceedings or causes of action of every kind, nature, and character relating to EBRPHA's performance hereunder, including without limitation any claims made by an Assigned Staff Person against either EBRPHA or EBRP Housing Authority Holdings, Inc. for any reason.
  - b. EBRP Housing Authority Holdings, Inc. agrees to be responsible to protect, defend, keep, save, and hold EBRPHA, its commissioners, officers, employees, agents and subcontractors free and harmless from and against all liabilities, losses, penalties, damages, settlements, environmental liability, costs, charges, costs incurred in connection with responding to internal and external investigations, professional fees (including attorneys' fees) or other expenses or liabilities of every kind, nature and character arising out of or relating to any and all claims, liens, demands, obligations, actions, suits,

judgments, or settlements, proceedings or causes of action of every kind, nature, and character relating to EBRP Housing Authority Holdings, Inc.'s performance hereunder with the exception of any claims made by an Assigned Staff Person against either EBRPHA or EBRP Housing Authority Holdings, Inc. for any reason.

17. Communication and Notices. The parties agree to use their best efforts to communicate all material information regarding this Agreement to the other party completely and promptly. All notices, requests, claims and other communications described herein or required hereby, shall be given, or made by personal delivery, courier, facsimile or certified mail to the parties at the following addresses:

If to EBRPHA:

A. Jim Daniels., CEO  
East Baton Rouge Parish Housing Authority  
4731 North Boulevard  
Baton Rouge, Louisiana 70806  
Telephone: 225-923-8100  
Email: jdaniels@partnerssoutheast.com

If to EBRP Housing Authority Holdings, Inc.:

\_\_\_\_\_  
EBRP Housing Authority Holdings, Inc.  
4731 North Boulevard  
Baton Rouge, Louisiana 70806  
Telephone: 225-923-8100  
Email: \_\_\_\_\_

IN WITNESS WHEREOF, the parties, by and through their duly authorized representatives, have executed this Agreement effective as of the date set forth above.

**East Baton Rouge Parish Housing Authority**

By: \_\_\_\_\_  
Jim Daniels., CEO

**EBRP Housing Authority Holdings, Inc.**

By: \_\_\_\_\_

## **Resolution Number 2022-18**

### **Authorization and Approval for entering into Resource Sharing Agreement between East Baton Rouge Parish Housing Authority and EBRP Housing Authority Holdings, Inc.**

**BE IT KNOWN**, that on the 29<sup>th</sup> day of September 2022, the Board of Commissioners of the Housing Authority of East Baton Rouge Parish, with Administrative Office located at 4731 North Boulevard, in the City of Baton Rouge, Parish of East Baton Rouge, adopted the following Resolution.

**WHEREAS**, the East Baton Rouge Parish Housing Authority is responsible for the proper operation of its Public Housing and Housing Choice Voucher Programs in accordance with rules and regulations set by the U. S. Department of Housing and Urban Development and State of Louisiana; and

**WHEREAS**, the East Baton Rouge Parish Housing Authority staff is requesting the authorization and approval of the execution of the Resource Sharing Agreement with EBRP Housing Authority Holdings, Inc.

**NOW, THEREFORE, BE IT RESOLVED**, by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish has approved execution of the Resource Sharing Agreement between EBRPHA and EBRP Housing Authority Holdings, Inc.

I, hereby, certify that the foregoing is a true copy of a Resolution adopted by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish at the Regular Meeting held on the 29<sup>h</sup> day of September 2022. I further certify that a quorum of the members of the Board of Commissioners was present and that this Resolution was adopted by a Vote of \_\_\_\_ Yeas; \_\_\_\_ Nays; \_\_\_\_ Abstained.

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Dianna Payton  
Chair

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J. Wesley Daniels, Jr.  
Secretary/Chief Executive Officer



## Agenda Item – No. 9

### Vehicle Disposition

#### **Action:**

**1. Approve Resolution No. 2022-19 to authorize the disposal of obsolete vehicles:**

- HA59 - 2005 Chevrolet Cargo Van
- HA11 - 2006 Ford Freestyle Van
- HA20 - 2008 Ford F-150
- HA62 - 2012 Ford F-150

#### **Staff Resource(s):**

J. Daniels, CEO

Carlton Brown, Finance

#### **External Resource(s):**

State property disposition process

#### **Background/Explanation:**

Vehicles HA20, HA59, and HA11 all have engine failure, replacement engines & labor cost would exceed the value of the vehicles.

Vehicle HA62 has a severe oil and coolant leak. Repairs for HA62 would only extend the life of the vehicle for two to three months before complete engine failure. The recommendation received from a mechanic was to not repair unless a full engine swap is performed, which would exceed the value of the vehicle.

#### **Time Sensitivity:**

Customary Procedure

#### **Funding Source:**

N/A

#### **MWBE/DBE/Section 3:**

N/A

#### **Attachments:**

Resolution No. 2022-19

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*

## **Resolution Number 2022-19**

### **Approval of Disposition of Obsolete Vehicles For East Baton Rouge Parish Housing Authority**

**BE IT KNOWN**, that on the 29<sup>th</sup> day of September 2022, the Board of Commissioners of the Housing Authority of East Baton Rouge Parish, with Administrative Office located at 4731 North Boulevard, in the City of Baton Rouge, Parish of East Baton Rouge, adopted the following Resolution.

**WHEREAS**, the East Baton Rouge Housing Parish Authority is responsible for the proper operations of its Public Housing Program in accordance with the rules and regulations promulgated by the U. S. Department of Housing and Urban Development (HUD); and

**WHEREAS**, the East Baton Rouge Housing Parish Authority has a disposition policy which provides for the disposal of obsolete vehicles: and

**WHEREAS**, the East Baton Rouge Housing Parish Authority staff has determined that the agency vehicles described as:

HA59 - 2005 Chevrolet Cargo Van  
HA11 - 2006 Ford Freestyle Van  
HA20 - 2008 Ford F-150  
HA62 - 2012 Ford F-150

should be disposed; and

**NOW, THEREFORE BE IT RESOLVED**, by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish that said vehicles, HA59, HA11, HA20 and HA62 shall be disposed or discarded by the Housing Authority in accordance with the Disposition Policy.

I, hereby, certify that the foregoing is a true copy of a Resolution adopted by the Board of Commissioners of the Housing Authority of East Baton Rouge Parish at the Regular Meeting held on the 29<sup>th</sup> day of September 2022. I further certify that a quorum of the members of the Board of Commissioners was present and that this Resolution was adopted by a Vote of \_\_\_\_ Yeas; \_\_\_\_ Nays; \_\_\_\_ Abstained.

---

Dianna Payton  
Chair

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J. Wesley Daniels, Jr.  
Secretary/Chief Executive Officer

#### *Mission Statement*

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## Agenda Item – No. 10

### Chief Executive Officer Report

September 2022

#### Administrative

**Office Hours** – EBRPHA has resumed its pre-COVID office hours. The main office hours are:

- Monday -Thursday: 7am – 6pm
- Friday: 7:30am – 4:30pm

These new office hours will facilitate creating convenience and ACCESS to our families and partners.

**Transition** –Recruiting efforts continue for the EBRPHA COO and CFO positions.

**Housing Choice Vouchers** – EBRPHA received an additional, twenty-nine (29) vouchers from HUD as new and Fair Share vouchers of approximately **\$280,000** in funding.

**Capital Fund Drawdown** – The board-approved, Capital Fund plans have been approved by HUD. Based upon this approval, staff will drawdown the FY21 and FY22 Capital Fund administrative fees in the approximate amount of **\$579,000** (FY21 – \$260,000 and FY22 - \$316,000). FY21 Admin Fees of \$260K will be added the FY22 COCC revenue and FY22 Admin Fees will be added to FY23 COCC revenue.

**Partners Southeast: Autumn/Willow Guarantor Reserves** – Partners Southeast formally requested the reduction of the Guarantor Reserve for Autumn Place and Willow Creek. As a result, the investor approved the release of **\$350,000** (\$175K per property) to Partners Southeast. Per the Limited Partnership Agreements (LPA), the Guarantor Reserve may be reduced to a minimum balance of \$100,000, per project. The funds are subject to the Distribution of Net Cash Flow per the LPA, the proposed use of the funds are RDA loan repayments, accrued asset management fees and developer fees.

**Cypress Pinchback: Partners Southeast Liquidity Requirement** – Following the fulfillment of the grant commitment, Partners Southeast will have a projected bank balance of \$939,252.77. Partners is requesting a deposit up to **\$65,000** to ensure a bank account balance of at least \$1,000,000 to comply with the Partners liquidity requirement as the guarantor for the Cypress Pinchback. The \$62,563.97 will be returned to EBRPHA after complying with Partners' liquidity requirements by the tax credit investor.

**Partners Southeast: Property Insurance Deductible Reimbursement** – In 2017, Partners Southeast booked a \$100,000 insurance deductible payment for the flood insurance loss for Cedar Pointe and Brookstown Place. Partners secured a \$10,000 grant from Enterprise to defray a portion of the deductible cost. The FEMA/GOHSEP request for nonprofit grant assistance of **\$90,000** was denied. Therefore, Partners had to book the expense as the General Partner of the properties because the property operating accounts were insufficient to cover the expense. Years later, the properties have recovered financially and staff is seeking the reimbursement of the \$90,000. This transaction should occur in early 2023.

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**Employee Retention Credit** – The Infrastructure Investment and Jobs Act, enacted on November 15, 2021, created the Employee Retention Credit (ERC). This credit is a refundable tax credit against certain employment taxes equal to 50% of the qualified wages an eligible employer pays to employees after March 12, 2020, and before January 1, 2021. Eligible employers can get immediate access to the credit by reducing employment tax deposits they are otherwise required to make. For each employee, wages (including certain health plan costs) up to \$10,000 can be counted to determine the amount of the 50% credit. Employers, including tax-exempt organizations such as Partners, are eligible for the credit if they operate a trade or business during calendar year 2020. After a detailed review of the documents submitted, ERC Specialists have determined that PSE qualifies for an Employee Retention Credit in the amount up to **\$58,200**.

**Oklahoma Street – LA DODT Expropriation** – A portion of EBRPHA's Oklahoma Street property was expropriated and is now owned by the State through DOTD, per the Order from the Court placing DOTD into possession and ownership signed October 19, 2021. The state's ability to expropriate the parcels under this provision allows them to gain immediate ownership upon placing the appraised value of the property into the Court registry. DOTD deposited into the registry of the Court \$31,308. This is the undisputed amount that DOTD estimated as the value of the property based on its assessments. Staff is not disputing the amount and has elected to withdraw the **\$31,308** in proceeds.

## **Pipeline**

Closings scheduled for 2022:

- **Cypress Pinchback – CLOSED: April 2021**
- **Capstone at Scotlandville (formerly known as "Elm Grove") – CLOSED: December 2021**
- Cypress River Lofts – Closing scheduled for December 2022
- Earl K. Long – Closing scheduled for December 2022
- North Blvd. – Closing scheduled for December 2022
- Cypress at Ardendale – Phase I – Closing scheduled for December 2022

## **Initiatives**

### **Choice Neighborhood Implementation**

Infrastructure – In June 2021, EBRPHA requested \$15M from the City-Parish (CNI Co-Applicant) for the CNI housing infrastructure investment. In January 2022, EBRPHA renewed its \$15M funding request from the City-Parish. The CNI team has endeavored to engage additional partners such as LHC, State OCD and other public organizations to assist with funding effort.

In August 2022, the City-Parish has made a commitment of **\$8M** to support the CNI housing plan. The funding will be expended for infrastructure and housing costs.

Cypress at Ardendale – Phase I is scheduled to close in December 2022. Cypress at Ardendale Senior – Phase II was awarded \$1.5M 9% tax credit at LHC's April 2022 Board Meeting. This award represents \$13.0M in tax credit equity investment from the private sector.

### *Mission Statement*

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EBRPHA held a CNI Stakeholder Meeting on August 4, 2022, updating partners on our progress and critical issues that need to be resolved for us to be successful in meeting grant requirements within our timeline.

Wilson Foundation – EBRPHA participated in the Ardendale community stakeholder meeting, at CTEC, highlighting investments in and around the Ardendale community. The goal of Wilson’s meeting was to communicate a better understanding of how the CNI area will look different in the next five years. Also, EBRPHA highlighted the plans for supportive services for residents. This presentation will assist Wilson in its decision of implementing the “Purpose Built Communities” model in this neighborhood and avoiding an unnecessary duplication of efforts by EBRPHA and its partners.

MoveBR Future Community Enhancement Program – Councilmember Cleve Dunn submitted two, CNI projects to the MoveEBR Future Community Enhancement Program in a Call for Projects:

- **BR Choice Multi-Modal Path and Connector Bridge Non-Federal Matching Funds (\$435,000)**  
The City/Parish of Baton Rouge and EBRPHA were awarded \$1,750,000 in LADOTD Transportation Alternate Program funds to construct a new multi-modal path and connector bridge along the main thoroughfares within the new mixed-income housing development, Cypress at Ardendale.
- **North Ardenwood Drive (Florida Blvd to Greenwell Springs) Street Improvement Project**  
Ardenwood Drive is a four-lane corridor with limited lighting and sidewalks. The proposed project would improve existing conditions along Ardenwood Dr., including sidewalks on each side of the roadway, lighting, streetscape and separated bike lanes. Planning and construction funds are being requested to implement this project.

**RAD** – Per HUD’s instruction, staff is proceeding with the “subsidy only” conversion for River South. The EBRPHA Board approved moving forward with the “subsidy only” conversions for River South, Autumn Place and Willow Creek September 2019 via Resolution No. 2019-22.

RAD closing schedule:

- **AMP 6**
  - River South – Pending closing on September 30, 2022
- **AMP 7**
  - Autumn Place – **Closed: August 2021**
- **AMP 8**
  - Willow Creek – **Closed: August 2021**

#### **Other Repositioning Activities**

- **AMP 3**
  - Turner Plaza: Section 18 Disposition – Application submitted June 2021
    - Considering RAD Section 18 Blend strategy
- **AMP 5**
  - Sharlo Terrace: Section 18 Disposition
    - Application submitted – June 2021
    - Application withdrawn – December 2021 (SAC would not accept justification)
    - Considering RAD Section 18 Blend strategy

#### *Mission Statement*

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- **AMP 4**

- Duane Street: New financing strategy
  - 2022 LIHTC Application submitted – December 2021
  - Not awarded 9% tax credits
  - Historic tax credits app submitted – May 2022

## **Partnerships**

**Entergy Louisiana's Power Through program** – Entergy's Power Through program was voted upon and approved by the Louisiana Public Service Commission (PSC). Entergy's Power Through program will be piloted by our newly constructed, 99-unit senior community, Cypress Pinchback. This partnership should become a national model of resiliency and hardened infrastructure. We expect to receive the written order from LPSC Staff in the coming weeks. Looking forward to firming up the Power Through proposals and working towards finalizing the commercial agreements for Pinchback.

**New Roads Housing Authority** – EBRPHA received correspondence from the City of New Roads to administer the HCV Program. Staff working through the process for voluntary transfer of City of New Roads' HCV program. The potential effective date for permanent transfer is January 1, 2023.

Currently, New Roads Housing Authority has sixty-two (62) PH units and approximately forty-seven (47) Housing Choice Vouchers. Along with permanently taking over the New Roads HCV program there is the potential opportunity for redeveloping the 62 PH units. This supports our regional, housing choice strategy.

## **Marketing/PR**

- 2022 NAHRO National Conference – Awards (6 awards)
  - Commissioner of the Year Award – Chair Dianna Payton
  - Agency Awards – EBRPHA (5 awards)
    - Administrative Innovation: "Telling the Affordable Housing Story" – Innovation in Public Relations
    - Resident & Client Services: Beds for Kids & Babies
    - Resident & Client Services: Bell Ringers
    - Resident & Client Services: Harmony Garden for Wellness
    - Resident & Client Services: Tech Tools for Children in Housing Communities
- OWA 2021 Community Report – release October 2022

## **Board Actions – Looking Forward**

- Transaction Authorization: Earl K. Long – November Board Meeting

## **Board Development & Enhancement**

- 2022 Louisiana Housing Council Fall Conference: November 1-4, 2022
- 2023 NAHRO Washington Conference: March 6-8, 2023

## **Next Board Meeting**

Thursday, November 10, 2022

### *Mission Statement*

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## Agenda Item – No. 11

### Departmental Reports

**Action:**

No action required

**Staff Resource(s):**

Janie Anderson, Housing Choice

Nicole Huval, Affordable Housing

Doris Mejia, Housing Choice

Ivra Amacker, Affordable Housing & Human Resources (Interim)

Jarkus McKinley, Facilities Management

**External Resource(s):**

HUD

Supportive Service Providers

Vendors/Contractors

HCV Landlords

**Background/Explanation:**

The EBRPHA COO manages several departments including Housing Choice, Public Housing, Capital Fund, Finance and Human Resources.

**Time Sensitivity:**

N/A

**Funding Source:**

COCC

Housing Choice Program

Affordable Housing/AMP

Capital Fund

**MWBE/DBE/Section 3:**

No reporting scheduled

**Attachments:**

Chief Operating Officer Report

Financial Statements/Reports

Housing Choice Voucher Program

Affordable Housing

Capital Fund Program

Human Resources

*Mission Statement*

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## Agenda Item – No. 11a

### Chief Operating Officer Report

**Action:**

None

**Staff Resource(s):**

April Downs, Chief of Staff

Janie Anderson, Housing Choice

Ivra Amacker, Affordable Housing & Human Resources (Interim)

Jarkus McKinley, Facilities Management

Carlton Brown, Finance

**External Resource(s):**

HUD

Supportive Service Providers

Vendors/Contractors

HCV Landlords

**Updates/Background/Explanation:**

Included in Departmental Reports

**Time Sensitivity:**

N/A

**Funding Source:**

COCC

Affordable Housing/AMP

Housing Choice Program

Capital Fund

Insurance Proceeds

**MWBE/DBE/Section 3:**

N/A

**Attachments:**

Reports Attached

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## **Agenda Item – No. 11b**

### **Financial Statements - Income & Expense Report**

#### *Mission Statement*

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### Central Office Cost Center

[illegible]

### Central Office Cost Center

[illegible]

**FY 22 ANALYSIS - June 2022 FINANCIALS**
**HCV**

	<u>Monthly Actuals</u>	<u>Monthly Budget</u>	<u>YTD Actuals</u>	<u>YTD %</u>	<u>Annual Budget</u>	<u>Budget Balance</u>
<b>75% Budget Year</b>						
<b><u>Operating Income</u></b>						
Other Income (Interest, Misc)	\$ -	\$ 2,188	\$ 4,917	19%	\$ 26,250	\$ 21,333
Admin Fees - Port In from other PHAs	\$ 2,348	\$ -	\$ 18,727		\$ -	\$ (18,727)
Fraud Recovery	\$ 1,471	\$ -	\$ 25,178		\$ -	\$ (25,178)
Operating Subsidy-Adm. Fees Earned	\$ 264,427	\$ 229,014	\$ 2,153,472	78%	\$ 2,748,163	\$ 594,691
<b>Total operating receipts</b>	<b>\$ 268,246</b>	<b>\$ 231,201</b>	<b>\$ 2,202,294</b>	<b>79%</b>	<b>\$ 2,774,413</b>	<b>\$ 572,119</b>
<b><u>Operating Expenses</u></b>						
Administrative	\$ 170,401	\$ 216,047	\$ 1,347,269	52%	\$ 2,592,568	\$ 1,245,299
Management Fees	\$ 52,885	\$ 45,803	\$ 430,220	78%	\$ 549,632	\$ 119,412
Utilities	\$ 435	\$ 404	\$ 3,716	77%	\$ 4,850	\$ 1,134
Ordinary Maintenance & Operations	\$ 9,831	\$ 4,780	\$ 36,282	63%	\$ 57,362	\$ 21,080
General Expense	\$ -	\$ 2,083	\$ 5,090	20%	\$ 25,000	\$ 19,910
Insurance	\$ 16,156	\$ 13,435	\$ 103,423	64%	\$ 161,225	\$ 57,802
Collection Losses	\$ -	\$ 83	\$ 1,271	127%	\$ 1,000.00	\$ (271)
<b>Total operating expenses</b>	<b>\$ 249,708</b>	<b>\$ 282,636</b>	<b>\$ 1,927,271</b>	<b>57%</b>	<b>\$ 3,391,637</b>	<b>\$ 1,464,366</b>
<b>Surplus/Deficit</b>	<b>\$18,537</b>	<b>(\$51,435)</b>	<b>\$275,023</b>		<b>(\$617,224)</b>	
Prop. Betterments & Additions	\$ -	\$ -	\$ -		\$ -	\$ -
CARES ACT Funding	\$ -		\$ (227,035)	\$ 863,558		
CARES ACT Expenses	\$ -		\$ 227,035	\$ 863,558		
<b>Net Total</b>	<b>\$ -</b>		<b>\$ 0</b>	<b>\$ -</b>		
	<u>Monthly Actuals</u>	<u>Monthly Budget</u>	<u>YTD Actuals</u>	<u>YTD %</u>	<u>YTD Budget</u>	<u>Budget Balance</u>
<b>Operating Subsidy</b>						
HAP	\$ 2,689,455	\$ 2,718,658	\$ 21,834,584	67%	\$ 32,623,901	\$ 10,789,317
Fraud Recovery	\$ 1,471	\$ -	\$ 9,928	0%	\$ -	\$ (9,928)
Interest	\$ -	\$ -	\$ -		\$ -	\$ -
<b>HAP Expenses</b>						
HAP	\$ 2,764,212	\$ 2,685,053	\$ 23,973,451	74%	\$ 32,220,630	\$ 8,247,179
<b>Surplus/Deficit</b>	<b>(73,286)</b>	<b>33,606</b>	<b>(2,128,939)</b>		<b>403,271</b>	
<b>Notes:</b>						
<b>Administrative Expenses</b>						
Salaries and benefits, travel, legal, training, contracts, office supplies, postage, advertising, telephones, memberships, expendable equipment						
<b>Ordinary Maintenance &amp; Operations</b>						
Salaries & Benefits, materials, contracts-electrical, plumbing, lawncare, pest control, hvac						
<b>General Expenses</b>						
Insurances-property, general liability, fidelity bond, public officials, workers comp, flood						
			<b>2021 Admin (UNP)Retained Earning Balance</b>			<b>\$ 2,066,586</b>

**FY 22 ANALYSIS - July 2022 FINANCIALS**
**HCV**

	Monthly Actuals	Monthly Budget	YTD Actuals	YTD %	Annual Budget	Budget Balance
<b>83% Budget Year</b>						
<b>Operating Income</b>						
Other Income (Interest, Misc)	\$ -	\$ 2,188	\$ 4,917	19%	\$ 26,250	\$ 21,333
Admin Fees - Port In from other PHAs	\$ 2,294	\$ -	\$ 21,021		\$ -	\$ (21,021)
Fraud Recovery	\$ 1,293	\$ -	\$ 26,471		\$ -	\$ (26,471)
Operating Subsidy-Adm. Fees Earned	\$ 264,060	\$ 229,014	\$ 2,417,532	88%	\$ 2,748,163	\$ 330,631
<b>Total operating receipts</b>	<b>\$ 267,647</b>	<b>\$ 231,201</b>	<b>\$ 2,469,941</b>	<b>89%</b>	<b>\$ 2,774,413</b>	<b>\$ 304,472</b>
<b>Operating Expenses</b>						
Administrative	\$ 172,516	\$ 216,047	\$ 1,519,785	59%	\$ 2,592,568	\$ 1,072,783
Management Fees	\$ 52,956	\$ 45,803	\$ 483,176	88%	\$ 549,632	\$ 66,456
Utilities	\$ 775	\$ 404	\$ 4,491	93%	\$ 4,850	\$ 359
Ordinary Maintenance & Operations	\$ 2,079	\$ 4,780	\$ 38,361	67%	\$ 57,362	\$ 19,001
General Expense	\$ -	\$ 2,083	\$ 5,090	20%	\$ 25,000	\$ 19,910
Insurance	\$ 16,051	\$ 13,435	\$ 119,474	74%	\$ 161,225	\$ 41,751
Collection Losses	\$ -	\$ 83	\$ 1,271	127%	\$ 1,000.00	\$ (271)
<b>Total operating expenses</b>	<b>\$ 244,377</b>	<b>\$ 282,636</b>	<b>\$ 2,171,648</b>	<b>64%</b>	<b>\$ 3,391,637</b>	<b>\$ 1,219,989</b>
<b>Surplus/Deficit</b>	<b>\$23,270</b>	<b>(\$51,435)</b>	<b>\$298,293</b>		<b>(\$617,224)</b>	
Prop. Betterments & Additions	\$ -	\$ -	\$ -		\$ -	\$ -
CARES ACT Funding	\$ -		\$ (227,035)	\$ 863,558		
CARES ACT Expenses	\$ -		\$ 227,035	\$ 863,558		
<b>Net Total</b>	<b>\$ -</b>		<b>\$ 0</b>	<b>\$ -</b>		
	<b>Monthly Actuals</b>	<b>Monthly Budget</b>	<b>YTD Actuals</b>	<b>YTD %</b>	<b>YTD Budget</b>	<b>Budget Balance</b>
<b>Operating Subsidy</b>						
HAP	\$ 3,574,155	\$ 2,718,658	\$ 25,408,739	78%	\$ 32,623,901	\$ 7,215,162
Fraud Recovery	\$ 1,293	\$ -	\$ 11,221	0%	\$ -	\$ (11,221)
Interest	\$ -	\$ -	\$ -		\$ -	\$ -
<b>HAP Expenses</b>						
HAP	\$ 2,729,786	\$ 2,685,053	\$ 26,703,238	83%	\$ 32,220,630	\$ 5,517,392
<b>Surplus/Deficit</b>	<b>845,661</b>	<b>33,606</b>	<b>(1,283,278)</b>		<b>403,271</b>	
<b>Notes:</b>						
<b>Administrative Expenses</b>						
Salaries and benefits, travel, legal, training, contracts, office supplies, postage, advertising, telephones, memberships, expendable equipment						
<b>Ordinary Maintenance &amp; Operations</b>						
Salaries & Benefits, materials, contracts-electrical, plumbing, lawncare, pest control, hvac						
<b>General Expenses</b>						
Insurances-property, general liability, fidelity bond, public officials, workers comp, flood						
			<b>2021 Admin (UNP)Retained Earning Balance</b>			<b>\$ 2,066,586</b>

# FY 22 ANALYSIS - June 2022 FINANCIALS

## PARTNERS SOUTHEAST

	Monthly Actuals	Monthly Budget	YTD Actuals	YTD %	Annual Budget	Budget Balance
<b>75% Budget Year</b>						
<b><u>Operating Income</u></b>						
Interest/Misc Income	\$ 4,500	\$ -	\$ 39,000	111%	\$ 35,000	\$ (4,000)
Development Fee Income	\$ -	\$ 58,938	\$ 200	0%	\$ 707,255	\$ 707,055
Grants/Other		\$ 2,917		0%	\$ 35,000	\$ 35,000
<b>Total operating income</b>	<b>\$ 4,500</b>	<b>\$ 61,855</b>	<b>\$ 39,200</b>	<b>5%</b>	<b>\$ 777,255</b>	<b>\$ 738,055</b>
<b><u>Operating Expenses</u></b>						
Administrative	\$ 23,004	\$ 30,061	\$ 249,445	69%	\$ 360,735	\$ 111,290
Management Fees	\$ 6,271	\$ 7,084	\$ 70,883	83%	\$ 85,009	\$ 14,126
Tenant Services	\$ -	\$ 2,500	\$ 10,000	33%	\$ 30,000	\$ 20,000
Utilities	\$ 180	\$ 129	\$ 969	63%	\$ 1,550	\$ 581
Maintenance	\$ 134	\$ 736	\$ 2,496	28%	\$ 8,833	\$ 6,337
Protective Services	\$ -	\$ -	\$ -		\$ -	\$ -
Insurance	\$ 1,010	\$ 1,144	\$ 5,631	41%	\$ 13,729	\$ 8,098
Property Betterment and Additions	\$ -	\$ -	\$ -		\$ -	\$ -
Non Routine Maintenance	\$ -	\$ -	\$ -		\$ -	\$ -
Interest Expense	\$ -	\$ 2,366	\$ 6,594	23%	\$ 28,394	\$ 21,800
Other General Expense	\$ -	\$ 5,894	\$ 10	0%	\$ 70,726	\$ 70,716
Collection Loss	\$ -					
Gain or Loss Fixed Asset	\$ -	\$ -	\$ -		\$ -	\$ -
<b>Total operating expenses</b>	<b>\$ 30,599</b>	<b>\$ 49,915</b>	<b>\$ 346,027</b>	<b>58%</b>	<b>\$ 598,976</b>	<b>\$ 252,949</b>
<b>Surplus/Deficit</b>	<b>(\$26,099)</b>	<b>\$11,940</b>	<b>(\$306,827)</b>		<b>\$178,279</b>	
<b>Notes:</b>						
<b>Administrative Expenses</b>						
Salaries and benefits, travel, legal, training, contracts, office supplies, postage, advertising, telephones, memberships, expendable equipment						
<b>Ordinary Maintenance &amp; Operations</b>						
Salaries & Benefits,materials, contracts-electrical,plumbing, lawncare, pest control, hvac						
<b>General Expenses</b>						
Insurances-property, general liability, fidelity bond, public officials, workers comp, flood						

# FY 22 ANALYSIS - July 2022 FINANCIALS

## PARTNERS SOUTHEAST

	Monthly Actuals	Monthly Budget	YTD Actuals	YTD %	Annual Budget	Budget Balance
83% Budget Year						
<b>Operating Income</b>						
Interest/Misc Income	\$ -	\$ -	\$ 39,000	111%	\$ 35,000	\$ (4,000)
Development Fee Income	\$ -	\$ 58,938	\$ 200	0%	\$ 707,255	\$ 707,055
Grants/Other		\$ 2,917		0%	\$ 35,000	\$ 35,000
<b>Total operating income</b>	\$ -	\$ 61,855	\$ 39,200	5%	\$ 777,255	\$ 738,055
<b>Operating Expenses</b>						
Administrative	\$ 20,629	\$ 30,061	\$ 270,074	75%	\$ 360,735	\$ 90,661
Management Fees	\$ 7,065	\$ 7,084	\$ 77,948	92%	\$ 85,009	\$ 7,061
Tenant Services	\$ -	\$ 2,500	\$ 10,000	33%	\$ 30,000	\$ 20,000
Utilities	\$ 277	\$ 129	\$ 1,246	80%	\$ 1,550	\$ 304
Maintenance	\$ 69	\$ 736	\$ 2,565	29%	\$ 8,833	\$ 6,268
Protective Services	\$ -	\$ -	\$ -		\$ -	\$ -
Insurance	\$ 908	\$ 1,144	\$ 6,539	48%	\$ 13,729	\$ 7,190
Property Betterment and Additions	\$ -	\$ -	\$ -		\$ -	\$ -
Non Routine Maintenance	\$ -	\$ -	\$ -		\$ -	\$ -
Interest Expense	\$ 3,064	\$ 2,366	\$ 9,657	34%	\$ 28,394	\$ 18,737
Other General Expense	\$ -	\$ 5,894	\$ 10	0%	\$ 70,726	\$ 70,716
Collection Loss	\$ -					
Gain or Loss Fixed Asset	\$ -	\$ -	\$ -		\$ -	\$ -
<b>Total operating expenses</b>	\$ 32,012	\$ 49,915	\$ 378,039	63%	\$ 598,976	\$ 220,937
<b>Surplus/Deficit</b>	<b>(\$32,012)</b>	<b>\$11,940</b>	<b>(\$338,839)</b>		<b>\$178,279</b>	
<b>Notes:</b>						
<b>Administrative Expenses</b>						
Salaries and benefits, travel, legal, training, contracts, office supplies, postage, advertising, telephones, memberships, expendable equipment						
<b>Ordinary Maintenance &amp; Operations</b>						
Salaries & Benefits,materials, contracts-electrical,plumbing, lawncare, pest control, hvac						
<b>General Expenses</b>						
Insurances-property, general liability, fidelity bond, public officials, workers comp, flood						

## Agenda Item – No. 11b

### AMP Income & Expense Report

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*



**FY22 ANALYSIS - June 2022 FINANCIALS**
**AMP 1**
**Monte Sano, Clarksdale**
**Wood Plaza, Scotland Villa**

	<u>Monthly Actuals</u>	<u>Monthly Budget</u>	<u>YTD Actuals</u>	<u>YTD %</u>	<u>Annual Budget</u>	<u>Budget Balance</u>
<b>75% Budget Year</b>						
<b><u>Operating Income</u></b>						
Tenant Rental Inc.(rent & utilities)	\$ 36,031	\$ 46,129	\$ 352,974	65%	\$ 539,628	\$ 186,654
Operating Subsidy	\$ 176,408	\$ 81,665	\$ 763,196	91%	\$ 842,206	\$ 79,010
Other (Interest)	\$ -	\$ 46	\$ -	0%	\$ 550	\$ 550
Other(Late Fees, Laundry Inc, Maint. Reimb.)	\$ 2,946	\$ 4,517	\$ 34,469	63%	\$ 54,500	\$ 20,031
<b>Total operating receipts</b>	<b>\$ 215,385</b>	<b>\$ 132,356</b>	<b>\$ 1,150,639</b>	<b>80%</b>	<b>\$ 1,436,884</b>	<b>\$ 286,245</b>
<b><u>Operating Expenses</u></b>						
Administrative	\$ 7,329	\$ 14,423	\$ 89,129	48%	\$ 186,906	\$ 97,777
Management & Bookkeeping Fees	\$ 13,713	\$ 14,901	\$ 122,408	71%	\$ 172,040	\$ 49,632
Tenant Services	\$ 4,161	\$ 3,450	\$ 41,530	86%	\$ 48,283	\$ 6,753
Utilities	\$ 45,292	\$ 24,910	\$ 242,299	84%	\$ 286,903	\$ 44,604
Ordinary Maintenance & Operations	\$ 52,558	\$ 42,148	\$ 426,382	74%	\$ 576,493	\$ 150,111
Protective Services	\$ 1,834	\$ 1,479	\$ 12,899	72%	\$ 18,000	\$ 5,101
Insurance Expense	\$ 28,953	\$ 19,461	\$ 217,412	68%	\$ 318,224	\$ 100,812
Expendable Equipment (Appliances)	\$ -	\$ 5,500	\$ 4,128	6%	\$ 65,000	\$ 60,872
Other General Expenses		\$ -			\$ -	\$ -
Non Routine Maintenance	\$ -	\$ 1,250	\$ -		\$ -	\$ -
Collection Losses	\$ 16,837	\$ 2,083	\$ 81,816	327%	\$ 25,000	\$ (56,816)
Proceeds from Insurance	\$ -	\$ -	\$ (1,000)		\$ -	\$ 1,000
Fire Damage Contracts	\$ -	\$ -	\$ -		\$ -	\$ -
<b>Total operating expenses</b>	<b>\$ 170,677</b>	<b>\$ 129,606</b>	<b>\$ 1,237,004</b>	<b>73%</b>	<b>\$ 1,696,849</b>	<b>\$ 459,845</b>
<b>Surplus/Deficit</b>	<b>44,708</b>	<b>2,750</b>	<b>(86,365)</b>		<b>(259,965)</b>	
Prop. Betterments & Additions	\$ -	\$ -	\$ -			\$ -
CARES ACT Funding	\$ -					
CARES ACT Expenses	\$ -					
Net Total	\$ -		\$ -			
		<b>Notes:</b>				
		<b>Administrative Expenses</b>				
		Salaries and benefits, travel, legal, training, contracts, office supplies, postage, advertising, telephones, memberships, expendable equipment				
		<b>Ordinary Maintenance &amp; Operations</b>				
		Benefits,materials,				
		<b>General Expenses</b>				
		Insurances-property, general liability, fidelity bond, public officials, workers comp, flood				
		<b>2021 Retained Earnings Ending Balance</b>				<b>\$ 719,303</b>

## Kelly Terrace and Zion Terrace

[illegible]

### AMP 3 Turner Plaza

	Monthly Actuals	Monthly Budget	YTD Actuals	YTD %	Annual Budget	Budget Balance
<b>75% Budget Year</b>						
<b>Operating Income</b>						
Tenant Rental Inc.(rent & utilities)	\$ 39,957	\$ 41,292	\$ 369,741	75%	\$ 495,509	\$ 125,768
Operating Subsidy/CFP Funds	\$ 50,506	\$ 28,005	\$ 322,706	96%	\$ 336,062	\$ 13,356
Other (Interest)	\$ -	\$ 125	\$ -	0%	\$ 1,500	\$ 1,500
Other(Late Fees, Laundry Inc, Maint. Reimb.)	\$ 1,381	\$ 2,083	\$ 14,380	58%	\$ 25,000	\$ 10,620
<b>Total operating receipts</b>	<b>\$ 91,844</b>	<b>\$ 71,506</b>	<b>\$ 706,827</b>	<b>82%</b>	<b>\$ 858,071</b>	<b>\$ 151,244</b>
<b>Operating Expenses</b>						
Administrative	\$ 7,863	\$ 14,728	\$ 86,417	49%	\$ 176,734	\$ 90,317
Management Fees	\$ 10,761	\$ 11,658	\$ 102,276	73%	\$ 139,891	\$ 37,615
Tenant Services	\$ 1,677	\$ 6,876	\$ 37,113	45%	\$ 82,506	\$ 45,393
Utilities	\$ 20,985	\$ 14,171	\$ 147,898	87%	\$ 170,048	\$ 22,150
Ordinary Maintenance & Operations	\$ 29,155	\$ 24,541	\$ 244,532	83%	\$ 294,488	\$ 49,956
Protective Services	\$ 1,604	\$ 1,417	\$ 11,287	66%	\$ 17,000	\$ 5,713
Insurance Expense	\$ 17,407	\$ 13,740	\$ 126,097	76%	\$ 164,875	\$ 38,778
Casualty Losses	\$ -	\$ -	\$ -		\$ -	\$ -
Expendable Equipment (Appliances)	\$ -	\$ 1,833	\$ 700	3%	\$ 22,000	\$ 21,300
Non Routine Maintenance		\$ -		0%	\$ -	\$ -
Collection Losses	\$ 9,371	\$ 833	\$ 42,806	428%	\$ 10,000	\$ (32,806)
<b>Total operating expenses</b>	<b>\$ 98,823</b>	<b>\$ 89,795</b>	<b>\$ 799,125</b>	<b>74%</b>	<b>\$ 1,077,542</b>	<b>\$ 278,417</b>
<b>Surplus/Deficit</b>	<b>(6,979)</b>	<b>(18,289)</b>	<b>(92,298)</b>		<b>(219,471)</b>	
Prop. Betterments & Additions	\$ -	\$ -	\$ -		\$ -	\$ -
CARES ACT Funding	\$ -		\$ -			
CARES ACT Expenses	\$ -		\$ -			
Net Total	\$ -		\$ -			
<b>Notes:</b>						
<b>Administrative Expenses</b>						
Salaries and benefits, travel, legal, training, contracts, office supplies, postage, advertising, telephones, memberships, expendable equipment						
Administrative Expenses were reduced to accommodate the Expendable Equipment line item						
<b>Ordinary Maintenance &amp; Operations</b>						
Salaries & Benefits,materials, contracts-electrical,plumbing, lawncare, pest control, hvac						
<b>General Expenses</b>						
Insurances-property, general liability, fidelity bond, public officials, workers comp, flood						
<b>2021 Retained Earnings Ending Balance</b>						<b>\$ 1,777,779</b>

	Monthly Actuals	Monthly Budget	YTD Actuals	YTD %	Annual Budget	Budget Balance
<b>75% Budget Year</b>						
<b>Operating Income</b>						
Tenant Rental Inc.(rent & utilities)	\$ 25,296	\$ 38,643	\$ 246,395	53%	\$ 463,713	\$ 217,318
Operating Subsidy/CFP Funds	\$ 113,305	\$ 61,005	\$ 553,289	76%	\$ 732,054	\$ 178,766
Other(Late Fees, Laundry,Misc, Maint. Reimb.)	\$ 2,576	\$ 2,917	\$ 21,204	61%	\$ 35,000	\$ 13,796
Other (Interest)	\$ -	\$ 63	\$ -	0%	\$ 750	\$ 750
<b>Total operating receipts</b>	<b>\$ 141,177</b>	<b>\$ 102,626</b>	<b>\$ 820,888</b>	<b>67%</b>	<b>\$ 1,231,517</b>	<b>\$ 410,629</b>
<b>Operating Expenses</b>						
Administrative	\$ 12,348	\$ 14,998	\$ 116,528	65%	\$ 179,979	\$ 63,451
Management Fees	\$ 11,305	\$ 11,423	\$ 101,494	74%	\$ 137,076	\$ 35,582
Tenant Services	\$ 1,722	\$ 3,979	\$ 17,888	37%	\$ 47,752	\$ 29,864
Utilities	\$ 15,312	\$ 16,453	\$ 154,476	78%	\$ 197,437	\$ 42,961
Ordinary Maintenance & Operations	\$ 48,423	\$ 45,137	\$ 337,847	62%	\$ 541,643	\$ 203,796
Protective Services	\$ 1,528	\$ 1,250	\$ 10,749	72%	\$ 15,000	\$ 4,251
Insurance Expense	\$ 25,840	\$ 20,632	\$ 182,155	74%	\$ 247,581	\$ 65,426
Casualty Losses		\$ -		0%	\$ -	\$ -
Expendable Equipment (Appliances)	\$ -	\$ 3,000	\$ 12,653	35%	\$ 36,000	\$ 23,347
Non Routine Maintenance	\$ -	\$ -	\$ -		\$ -	\$ -
Proceeds from Insurance	\$ -	\$ -	\$ -		\$ -	\$ -
Collection Losses	\$ 2,522	\$ 1,500	\$ 16,032	89%	\$ 18,000	\$ 1,968
<b>Total operating expenses</b>	<b>\$ 119,002</b>	<b>\$ 118,372</b>	<b>\$ 949,823</b>	<b>67%</b>	<b>\$ 1,420,468</b>	<b>\$ 470,645</b>
<b>Surplus/Deficit</b>	<b>\$22,175</b>	<b>(\$15,746)</b>	<b>(\$128,935)</b>		<b>(\$188,951)</b>	
Property Betterments & Additions			\$ -		\$ -	\$ -
CARES ACT Funding	\$ -					
CARES ACT Expenses						
Net Total	\$ -		\$ -			
Notes:						
Administrative Expenses						
Salaries & Benefits, travel, legal, training, contracts, office supplies, postage, advertising, telephones , memberships and expendable equipment.						
Ordinary Maintenance & Operations						
Salaries & Benefits,materials, contracts-electrical,plumbing, lawncare, pest control, hvac						
General Expenses						
Insurances-property, general liability, fidelity bond, public officials, workers comp, flood						
<b>2021 Retained Earnings Ending Balance</b>					<b>\$ 1,125,940</b>	

**AMP 5**  
**Sharlo Terrace**

[illegible]

## River South Scattered Site

75% Budget Year	Monthly Actuals	Monthly Budget	YTD Actuals	YTD %	Annual Budget	Budget Balance
Operating Income						
Tenant Rental Inc.(rent & utilities)	\$ 6,313	\$ 7,083	\$ 50,133	118%	\$ 42,500	\$ (7,633)
Operating Subsidy/CFP Funds	\$ 14,081	\$ 11,333	\$ 67,141	99%	\$ 68,000	\$ 859
Other (Interest)	\$ -	\$ 7	\$ -	0%	\$ 40	\$ 40
Other (Late fees, Maint Reimb)	\$ 376	\$ 500	\$ 2,496	83%	\$ 3,000	\$ 504
Total operating receipts	\$ 20,770	\$ 18,923	\$ 119,770	105%	\$ 113,540	\$ (6,230)
Operating Expenses						
Administrative	\$ 2,614	\$ 2,638	\$ 23,576	149%	\$ 15,825	\$ (7,751)
Management Fees	\$ 2,265	\$ 1,003	\$ 20,676	344%	\$ 6,016	\$ (14,660)
Tenant Services	\$ 200	\$ 785	\$ 1,372	29%	\$ 4,710	\$ 3,338
Utilities	\$ (19)	\$ 233	\$ 1,237	88%	\$ 1,399	\$ 162
Ordinary Maintenance & Operations	\$ 8,120	\$ 8,132	\$ 66,499	136%	\$ 48,789	\$ (17,710)
Protective Services	\$ 306	\$ 206	\$ 2,150	174%	\$ 1,235	\$ (915)
Insurance Expense	\$ 6,287	\$ 4,202	\$ 45,529	181%	\$ 25,214	\$ (20,315)
Casualty Losses	\$ -	\$ -	\$ -		\$ -	\$ -
Expendable Equipment (Appliances)	\$ -	\$ 611	\$ 1,402	38%	\$ 3,668	\$ 2,266
Non Routine Maintenance	\$ -	\$ -	\$ -	0%	\$ -	\$ -
Interest Expense	\$ -	\$ -	\$ -	0%	\$ -	\$ -
Collection Losses	\$ 236	\$ 208	\$ 992	79%	\$ 1,250	\$ 259
Total operating expenses	\$ 20,008	\$ 18,018	\$ 163,432	151%	\$ 108,106	\$ (55,326)
Surplus/Deficit	762	906	(43,662)		5,434	
Property Betterments & Additions	\$ -		\$ -	0%	\$ -	\$ -
CARES ACT Funding	\$ -		\$ -		\$ -	
CARES ACT Expenses	\$ -		\$ -			
Net Total	\$ -		\$ -			
Notes:						
Administrative Expenses						
salaries and benefits, travel, legal, training, contracts, office supplies, postage, advertising, telephones, memberships, expendable equipment						
Ordinary Maintenance & Operations						
Salaries & Benefits, materials, contracts-electrical, plumbing, lawncare, pest control, hvac						
General Expenses						
Insurances-property, general liability, fidelity bond, public officials, workers comp, flood						
2021 Retained Earnings Ending Balance						\$ 92,138

**FY22 ANALYSIS - July 2022 FINANCIALS**
**AMP 1**
**Monte Sano, Clarksdale**
**Wood Plaza, Scotland Villa**

	<u>Monthly Actuals</u>	<u>Monthly Budget</u>	<u>YTD Actuals</u>	<u>YTD %</u>	<u>Annual Budget</u>	<u>Budget Balance</u>
<b>83% Budget Year</b>						
<b><u>Operating Income</u></b>						
Tenant Rental Inc.(rent & utilities)	\$ 35,246	\$ 46,129	\$ 388,220	72%	\$ 539,628	\$ 151,408
Operating Subsidy	\$ 88,204	\$ 81,665	\$ 851,400	101%	\$ 842,206	\$ (9,194)
Other (Interest)	\$ -	\$ 46	\$ -	0%	\$ 550	\$ 550
Other(Late Fees, Laundry Inc, Maint. Reimb.)	\$ 3,540	\$ 4,517	\$ 38,009	70%	\$ 54,500	\$ 16,491
<b>Total operating receipts</b>	\$ 126,990	\$ 132,356	\$ 1,277,629	<b>89%</b>	\$ 1,436,884	\$ 159,255
<b><u>Operating Expenses</u></b>						
Administrative	\$ 12,215	\$ 14,423	\$ 101,344	54%	\$ 186,906	\$ 85,562
Management & Bookkeeping Fees	\$ 13,839	\$ 14,901	\$ 136,248	79%	\$ 172,040	\$ 35,792
Tenant Services	\$ 4,126	\$ 3,450	\$ 45,657	95%	\$ 48,283	\$ 2,626
Utilities	\$ 46,788	\$ 24,910	\$ 289,087	101%	\$ 286,903	\$ (2,184)
Ordinary Maintenance & Operations	\$ 61,668	\$ 42,148	\$ 488,051	85%	\$ 576,493	\$ 88,442
Protective Services	\$ 2,150	\$ 1,479	\$ 15,049	84%	\$ 18,000	\$ 2,951
Insurance Expense	\$ 29,012	\$ 19,461	\$ 246,424	77%	\$ 318,224	\$ 71,800
Expendable Equipment (Appliances)	\$ -	\$ 5,500	\$ 4,128	6%	\$ 65,000	\$ 60,872
Other General Expenses		\$ -			\$ -	\$ -
Non Routine Maintenance	\$ -	\$ 1,250	\$ -		\$ -	\$ -
Collection Losses	\$ 16,947	\$ 2,083	\$ 98,763	395%	\$ 25,000	\$ (73,763)
Proceeds from Insurance	\$ -	\$ -	\$ (1,000)		\$ -	\$ 1,000
Fire Damage Contracts	\$ -	\$ -	\$ -		\$ -	\$ -
<b>Total operating expenses</b>	\$ 186,746	\$ 129,606	\$ 1,423,750	<b>84%</b>	\$ 1,696,849	\$ 273,099
<b>Surplus/Deficit</b>	<b>(59,756)</b>	<b>2,750</b>	<b>(146,121)</b>		<b>(259,965)</b>	
Prop. Betterments & Additions	\$ -	\$ -	\$ -			\$ -
CARES ACT Funding	\$ -					
CARES ACT Expenses	\$ -					
Net Total	\$ -		\$ -			
		<b>Notes:</b>				
		<b>Administrative Expenses</b>				
		Salaries and benefits, travel, legal, training, contracts, office supplies, postage, advertising, telephones, memberships, expendable equipment				
		<b>Ordinary Maintenance &amp; Operations</b>				
		Benefits,materials,				
		<b>General Expenses</b>				
		Insurances-property, general liability, fidelity bond, public officials, workers comp, flood				
		<b>2021 Retained Earnings Ending Balance</b>				<b>\$ 719,303</b>

## AMP 2

### Kelly Terrace and Zion Terrace

[illegible]



# FY22 ANALYSIS - July 2022 FINANCIALS

## AMP 3 Turner Plaza

	Monthly Actuals	Monthly Budget	YTD Actuals	YTD %	Annual Budget	Budget Balance
83% Budget Year						
Operating Income						
Tenant Rental Inc.(rent & utilities)	\$ 39,794	\$ 41,292	\$ 409,535	83%	\$ 495,509	\$ 85,974
Operating Subsidy/CFP Funds	\$ 35,361	\$ 28,005	\$ 358,067	107%	\$ 336,062	\$ (22,005)
Other (Interest)	\$ -	\$ 125	\$ -	0%	\$ 1,500	\$ 1,500
Other(Late Fees, Laundry Inc, Maint. Reimb.)	\$ 1,467	\$ 2,083	\$ 15,847	63%	\$ 25,000	\$ 9,153
Total operating receipts	\$ 76,622	\$ 71,506	\$ 783,449	91%	\$ 858,071	\$ 74,622
Operating Expenses						
Administrative	\$ 10,848	\$ 14,728	\$ 97,265	55%	\$ 176,734	\$ 79,469
Management Fees	\$ 10,635	\$ 11,658	\$ 112,912	81%	\$ 139,891	\$ 26,979
Tenant Services	\$ 1,732	\$ 6,876	\$ 38,845	47%	\$ 82,506	\$ 43,661
Utilities	\$ 24,467	\$ 14,171	\$ 172,365	101%	\$ 170,048	\$ (2,317)
Ordinary Maintenance & Operations	\$ 24,374	\$ 24,541	\$ 268,906	91%	\$ 294,488	\$ 25,582
Protective Services	\$ 1,882	\$ 1,417	\$ 13,168	77%	\$ 17,000	\$ 3,832
Insurance Expense	\$ 17,464	\$ 13,740	\$ 143,561	87%	\$ 164,875	\$ 21,314
Casualty Losses	\$ -	\$ -	\$ -		\$ -	\$ -
Expendable Equipment (Appliances)	\$ -	\$ 1,833	\$ 700	3%	\$ 22,000	\$ 21,300
Non Routine Maintenance		\$ -		0%	\$ -	\$ -
Collection Losses	\$ 10,123	\$ 833	\$ 52,928	529%	\$ 10,000	\$ (42,928)
Total operating expenses	\$ 101,526	\$ 89,795	\$ 900,652	84%	\$ 1,077,542	\$ 176,890
Surplus/Deficit	(24,905)	(18,289)	(117,203)		(219,471)	
Prop. Betterments & Additions	\$ -	\$ -	\$ -		\$ -	\$ -
CARES ACT Funding	\$ -		\$ -			
CARES ACT Expenses	\$ -		\$ -			
Net Total	\$ -		\$ -			
Notes:						
Administrative Expenses						
Salaries and benefits, travel, legal, training, contracts, office supplies, postage, advertising, telephones, memberships, expendable equipment						
Administrative Expenses were reduced to accommodate the Expendable Equipment line item						
Ordinary Maintenance & Operations						
Salaries & Benefits,materials, contracts-electrical,plumbing, lawncare, pest control, hvac						
General Expenses						
Insurances-property, general liability, fidelity bond, public officials, workers comp, flood			2021 Retained Earnings Ending Balance			\$ 1,777,779

83% Budget Year											
	Monthly Actuals	Monthly Budget	YTD Actuals	YTD %	Annual Budget	Budget Balance					
Operating Income											
Tenant Rental Inc.(rent & utilities)	\$ 24,062	\$ 38,643	\$ 270,458	58%	\$ 463,713	\$ 193,255					
Operating Subsidy/CFP Funds	\$ 62,991	\$ 61,005	\$ 616,280	84%	\$ 732,054	\$ 115,775					
Other(Late Fees, Laundry,Misc, Maint. Reimb.)	\$ 1,828	\$ 2,917	\$ 23,032	66%	\$ 35,000	\$ 11,968					
Other (Interest)	\$ -	\$ 63	\$ -	0%	\$ 750	\$ 750					
Total operating receipts	\$ 88,881	\$ 102,626	\$ 909,769	74%	\$ 1,231,517	\$ 321,748					
Operating Expenses											
Administrative	\$ 14,271	\$ 14,998	\$ 130,799	73%	\$ 179,979	\$ 49,180					
Management Fees	\$ 10,864	\$ 11,423	\$ 112,358	82%	\$ 137,076	\$ 24,718					
Tenant Services	\$ 1,775	\$ 3,979	\$ 19,663	41%	\$ 47,752	\$ 28,089					
Utilities	\$ 26,085	\$ 16,453	\$ 180,562	91%	\$ 197,437	\$ 16,875					
Ordinary Maintenance & Operations	\$ 50,516	\$ 45,137	\$ 388,363	72%	\$ 541,643	\$ 153,280					
Protective Services	\$ 1,792	\$ 1,250	\$ 12,541	84%	\$ 15,000	\$ 2,459					
Insurance Expense	\$ 25,912	\$ 20,632	\$ 208,067	84%	\$ 247,581	\$ 39,514					
Casualty Losses		\$ -		0%	\$ -	\$ -					
Expendable Equipment (Appliances)	\$ -	\$ 3,000	\$ 12,653	35%	\$ 36,000	\$ 23,347					
Non Routine Maintenance	\$ -	\$ -	\$ -		\$ -	\$ -					
Proceeds from Insurance	\$ -	\$ -	\$ -		\$ -	\$ -					
Collection Losses	\$ 6,940	\$ 1,500	\$ 22,972	128%	\$ 18,000	\$ (4,972)					
Total operating expenses	\$ 138,155	\$ 118,372	\$ 1,087,977	77%	\$ 1,420,468	\$ 332,491					
Surplus/Deficit	(\$49,273)	(\$15,746)	(\$178,208)		(\$188,951)						
Property Betterments & Additions			\$ -		\$ -	\$ -					
CARES ACT Funding	\$ -										
CARES ACT Expenses											
Net Total	\$ -		\$ -								
Notes:											
Administrative Expenses											
Salaries & Benefits, travel, legal, training, contracts, office supplies, postage, advertising, telephones , memberships and expendable equipment.											
Ordinary Maintenance & Operations											
Salaries & Benefits,materials, contracts-electrical,plumbing, lawncare, pest control, hvac											
General Expenses											
Insurances-property, general liability, fidelity bond, public officials, workers comp, flood											
2021 Retained Earnings Ending Balance						\$ 1,125,940					

**AMP 5**  
**Sharlo Terrace**

	Monthly Actuals		Monthly Budget		YTD Actuals		YTD %		Annual Budget		Budget Balance
83% Budget Year											
Operating Income											
Tenant Rental Inc.(rent only)	\$	12,651	\$	12,091	\$	123,845	85%	\$	145,087	\$	21,242
Operating Subsidy/CFP Funds	\$	19,473	\$	16,043	\$	184,932	96%	\$	192,520	\$	7,589
Other (Interest)	\$	-	\$	42	\$	-	0%	\$	500	\$	500
Other(Late Fees, Laundry,Misc, Maint. Reimb.	\$	188	\$	542	\$	3,770	58%	\$	6,500	\$	2,730
Total operating receipts	\$	32,312	\$	28,717	\$	312,546	91%	\$	344,607	\$	32,061
Operating Expenses											
Administrative	\$	7,877	\$	6,660	\$	86,595	108%	\$	79,922	\$	(6,673)
Management Fees	\$	4,879	\$	5,207	\$	48,726	78%	\$	62,482	\$	13,756
Tenant Services	\$	853	\$	2,810	\$	13,004	39%	\$	33,720	\$	20,716
Utilities	\$	4,828	\$	2,536	\$	38,191	125%	\$	30,433	\$	(7,758)
Ordinary Maintenance & Operations	\$	15,950	\$	11,923	\$	115,004	80%	\$	143,077	\$	28,073
Protective Services	\$	806	\$	583	\$	5,644	81%	\$	7,000	\$	1,356
Insurance Expense	\$	7,358	\$	5,916	\$	61,620	87%	\$	70,994	\$	9,374
Casualty Losses	\$	-	\$	-	\$	-		\$	-	\$	-
Expendable Equipment (Appliances)	\$	-	\$	650	\$	890	11%	\$	7,800	\$	6,910
Non Routine Maintenance	\$	-	\$	-	\$	-	0%			\$	-
Collection Losses	\$	2,477	\$	167	\$	13,813	691%	\$	2,000	\$	(11,813)
Total operating expenses	\$	45,028	\$	36,452	\$	383,487	88%	\$	437,428	\$	53,941
Surplus/Deficit		(12,716)		(7,735)		(70,941)			(92,821)		
Property Betterments & Additions	\$	-			\$	-		\$	-	\$	-
CARES ACT Funding	\$	-			\$	-					
CARES ACT Expenses					\$	-					
Net Total	\$	-			\$	-					
Notes:											
Adminstrative Expenses: Salaries and benefits, travel, legal, training, contracts, office supplies, postage, advertising, telephones, memberships, expendable equipment											
Ordinary Maintenance & Operations:											
Salaries & Benefits,materials, contracts-electrical,plumbing, lawncare, pest control, hvac											
General Expenses: Insurances-property, general liability, fidelity bond, public officials, workmens comp, and flood.											
					2021 Retained Earnings Ending Balance					\$	1,011,272

## AMP 6

### River South Scattered Site

[illegible]

## Agenda Item – No. 11c

### Housing Choice Voucher Program Report

#### **Action:**

No action required

#### **Staff Resource(s):**

**Janie Anderson, Housing Choice**

Doris Mejía, Housing Choice

Stephen Dunn, Housing Choice

Ivra Amacker, Human Resources (Interim)

#### **External Resource(s):**

HUD

Housing Choice Landlords

#### **Background/Explanation:**

##### EBRPHA - HCV Program

- Housing Choice hosting virtual Landlord Seminars monthly
- Housing Choice working with Louisiana Balance of State Continuum of Care (LABOSCOC) to utilize Emergency Housing Vouchers and provide related services to these families.
- Housing Choice is continuing to hire for an Eligibility Analyst, Housing Analyst and an FSS Coordinator.
- Housing Choice working through process for voluntary transfer of City of New Roads' HCV program. Potential effective date of January 1, 2023.
- Healthy Housing Forum – Housing Choice participates in monthly meetings with Mayor's Office, landlords, and community partners to address housing related issues in our community. Housing Choice also in two working groups: Property Inspections and Office of Rental Assistance Pilot Program.
- National League of Cities Landlord Engagement Lab – Housing Choice part of year-long working group to implement a landlord engagement strategy and address housing issues in Baton Rouge.
- HUD released new Fair Market Rents (FMRs). Housing Choice submitting Board resolution adopting new Payment Standards.
- Housing Choice contracted services for calculating new Utility Allowances. Awaiting results from vendor. Housing Choice will submit completed schedules for Board approval once received.
- HUD awarded twenty-five additional HCV vouchers to EBRPHA as part of their "Fair Share Allocation." These vouchers are effective October 1, 2022.
- HUD released two funding opportunities for HUD-VASH: registration of interest for new VASH voucher allocation and process for reallocating VASH vouchers between PHAs. Housing Choice working with VA regarding both opportunities. New allocation requires Letter of Support from

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*

local VAMC and actual award based on HUD/VA formula. Reallocation is a voluntary process between two PHAs and the VAMC that requires HUD Field Office approval.

#### EBRPHA - HCV Waiting Lists

- EBRPHA has two HCV waiting lists:
  - EBRP HCV (3,417 applicants)
  - City of Plaquemine HCV (1,415 applicants)
- Housing Choice has been conducting eligibility interviews for both waiting lists and issuing vouchers accordingly. Housing Choice meets with Senior Accountant regularly to review lease up and utilization.

#### EBRPHA – HCV Utilization

<b>VMS Figures as of:</b>	<b>UMAs</b>	<b>Actual UMLs</b>	<b>PUC</b>	<b>YTD UML %</b>	<b>YTD ABA Expended %</b>
July 2022	4461	3715	\$714	82.5%	106.4%
HAP expenses currently exceed 100% of ABA as HUD wants Housing Authority to draw down our HAP reserves. HCV working to issue additional vouchers to further reduce reserves.					

- *VMS – Voucher Management System*
- *UMA – Unit Month Available – Number of vouchers allocated to the PHA (baseline). PHA cannot exceed UMA even if there is available funding to support more vouchers.*
- *UML – Unit Month Leased – Number of actual vouchers under contract as of the first of the month*
- *HAP – Housing Assistance Payment – Subsidy payment to landlord on behalf of family*
- *PUC – Per Unit Cost – Current average HAP expense per voucher*
- *YTD – Year to Date*
- *ABA – Annual Budget Authority – Current Fiscal Year funding for HAP expenses*

#### EBRPHA - Project-Based Vouchers (PBV) and RAD-PBV

- Housing Choice has six (6) site-specific PBV waiting lists:
  - Autumn Place (1,199 applicants)
  - Cypress Pinchback (222 applicants)
  - River South I (935 applicants)
  - River South II (1,068 applicants)
  - Roosevelt Terrace (789 applicants)
  - Willow Creek (1,213 applicants)
- Housing Choice refers applicants to applicable property management company for available PBV units. The waiting list includes families who are either pending eligibility or have been referred for suitability screening
- Housing Choice working with Public Housing in preparation for RAD conversion of River South I. Anticipated effective date of November 1, 2022.
- Housing Choice working with Partners Southeast on Cypress Pinchback PBV program. Housing Choice opened the Cypress Pinchback waiting list May 31, 2022, from 10:00 AM to 6:00 PM. Due to limited response, Housing Choice reopened the Pinchback waiting list June 20, 2022, at 10:00 AM. List will remain open for the time being. Housing Choice working with Latter & Blum (management company) on inspection and lease-up.

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*

#### EBRPHA – Family Self-Sufficiency (FSS) Program

- HCV submitting application for FSS Coordinator funding per 2022 FSS NOFO
- EBRPHA has 409 applicants on the FSS waiting list
- FSS has twenty-five (25) participants under contract. All slots currently filled
- Revised FSS Action Plan approved by HUD
- FSS inputting and tracking case information in software
- FSS continues communication with PCC
- FSS continues partnership outreach
- FSS continues to manage FSS email marketing group and FSS related activities
  - Planning workshops with Neighbors FCU, SU Ag Center, and Keller Williams to be held at East Baton Rouge Parish Library
- FSS regularly follows up with participants on goals and objectives
  - Seven participants currently earning escrow. A cumulative of eight participants have earned escrow so far totaling \$9,860.
  - Twelve participants are actively employed. A cumulative of sixteen (16) employed participants.
  - Six participants have completed First Time Homebuyer's Training through LHC
  - Eight participants have received/are receiving training or have enrolled in training (through BRCC, SUSLA Connect, LSU, SU Ag Center, Penn Foster, and Advanced Health Care Institute)
  - One participant has completed school
  - Eight participants have received credit counseling (through NFCU, NFCU Women's Empowerment Program, and Money Management International)

#### EBRPHA – Homeownership Program

- Homeownership Program has fifteen (15) current participants and one person with a voucher seeking a home for purchase.
- LHC has restarted their Step Up 2 EBR program with Home Bank

#### **Time Sensitivity:**

No action required

#### **Funding Source:**

EBRPHA Housing Choice Voucher (HCV) Program

#### **MWBE/DBE/Section 3:**

No reporting

#### **Attachments:**

N/A

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*

## Agenda Item – No. 11d

### Affordable Housing Report

**Action:**

No action required

**Staff Resource(s):**

Ivra Amacker, Affordable Housing

Nicole Huval, Affordable Housing

**External Resource(s):**

HUD

Supportive Service Providers

Vendors/Contractors

**Background/Explanation:**

The Affordable Housing program manages over 913 public housing units within thirteen (13) communities. Affordable housing staff includes property management, maintenance, and main office supervisors.

**Time Sensitivity:**

N/A

**Funding Source:**

COCC

Affordable Housing/AMP

Capital Fund

**MWBE/DBE/Section 3:**

No reporting scheduled

**Attachments:**

PH Summary Report

Leasing & Occupancy Report

Waiting List Status Report

Resident Services

*Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*





Affordable Housing  
Ivra Amacker, Vice President of  
Affordable Housing  
September 29, 2022

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### ***Certifications***

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All Affordable Housing residents are required to be evaluated annually for compliance with HUD regulations. **Currently, our Affordable Housing department has a HUD submission rate of 98.91%.**

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### ***Collections***

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**Affordable Housing collected about 92% and 87% of the rents charged in July and August, respectively.**

As always, repayment plans have been offered to all delinquent residents to maintain our occupancy and the financial health of our families. Our management staff has been working in tandem with our Family Services Coordinators and outside partners to enroll residents with large balances in financial aid programs.

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### ***Occupancy***

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**The Affordable Housing occupancy sits above 83%.** Sharlo Terrace and Turner Plaza applications for disposition were rejected, and we will begin turning units and housing from the waitlist at Sharlo Terrace until we are able to achieve approval. Turner Plaza move-ins continue to be paused.

Additionally, some of our waitlists are nearly depleted, and many of our families are migrating to the Housing Choice Voucher program. **The Affordable Housing waitlist opened on July 11<sup>th</sup> for all communities except Turner Plaza and River South (which converts to PBV November 1<sup>st</sup>).** Affordable Housing will be reopening the waitlist for both Sharlo Terrace and Zion Terrace, as they are nearly depleted.



Affordable Housing  
Ivra Amacker, Vice President of  
Affordable Housing  
September 29, 2022

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### ***Family Services***

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#### Metro Health

- HIV testing was provided to our residents, as well as tutoring and life skills seminars for the children.

#### Habitat for Humanity

- A homeownership class was hosted at the Scotlandville Library. There were about 20 participants, who received valuable information on taking the next financial steps.

#### Baton Rouge Early Childhood Development

- BRECEC continues to successfully host their Home Start program at our family sites. The children and parents have been given packets to prepare the children for Head Start by teaching reading and math skills.

#### FOAM

- FOAM continues to host ongoing events at our communities, including HSET training, gun safety strategies, financial freedom classes, and a course on recognizing and preventing abuse.

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### ***Attachments***

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- i. Occupancy Report
- ii. Collections Comparison
- iii. Waitlist Report

## Affordable Housing Occupancy August 2022 Report

AH Occupancy Report	August 2022								
Development	Total ACC Units	Units Available	Occupied Units	% Occupied	Move In	Move out	Turnarounds Completed	Total Vacant Units	Vacant Ready Units
3-1 Monte Sano	72	72	63	87.50%	1	4	1	9	0
3-2 Clarksdale	47	47	43	91.49%	1	0	0	4	0
3-9 Wood Plaza	50	44	37	84.09%	1	1	0	13	0
3-14 Scotland Villa	42	42	38	90.48%	0	1	0	4	0
3-8 Kelly Terrace	100	100	88	88.00%	0	4	1	20	2
3-11 Zion Terrace	98	97	82	83.67%	2	2	1	16	0
3-5 Turner Plaza	189	186	139	74.73%	0	3	0	47	4
3-4 Duane Street	29	29	27	93.10%	0	0	0	2	0
3-6 Ardenwood Village	93	92	76	82.61%	3	7	5	17	2
3-13 Capital Square	50	50	43	86.00%	0	1	0	7	0
3-15 Sharlo Terrace	78	78	67	85.90%	2	0	0	11	6
3-16 River South	33	33	30	90.91%	0	1	0	3	1
<b>TOTAL</b>	<b>881</b>	<b>870</b>	<b>725</b>	<b>83.33%</b>	<b>10</b>	<b>24</b>	<b>8</b>	<b>153</b>	<b>15</b>

FY22	FY22	
YTD Occupancy %	Turn-arounds Completed	
88.27%	12	
88.08%	8	
90.97%	7	
90.48%	4	
		<b>AMP 1</b>
86.20%	12	
85.57%	11	
		<b>AMP 2</b>
81.62%	1	
		<b>AMP 3</b>
85.52%	4	
85.59%	13	
93.06%	4	
		<b>AMP 4</b>
82.75%	8	
		<b>AMP 5</b>
93.66%	1	
		<b>AMP 6</b>
86.03%	85	<b>Overall</b>

## AFFORDABLE HOUSING COLLECTIONS COMPARISON

### August 2022

<u>Property</u>	<u>August Collection Rate</u>	<u>July Collection Rate</u>	<u>June Collection Rate</u>
3-1 Monte Sano	79.57%	81.95%	86.41%
3-2 Clarksdale	129.29%	157.91%	76.72%
3-9 Wood Plaza	48.24%	71.91%	60.57%
3-14 Scotland Villa	88.21%	81.99%	79.33%
3-8 Kelly Terrace	77.70%	82.27%	69.92%
3-11 Zion Terrace	73.38%	89.27%	95.80%
3-5 Turner Plaza	98.62%	98.98%	95.43%
3-4 Duane Street	179.70%	123.24%	179.34%
3-6 Ardenwood Village	72.35%	74.52%	78.50%
3-13 Capital Square	102.30%	91.53%	93.49%
3-15 Sharlo Terrace	93.52%	97.86%	98.20%
3-16 River South	<u>99.28%</u>	<u>93.30%</u>	<u>102.05%</u>
<b>TOTAL</b>	<b>87.00%</b>	<b>91.18%</b>	<b>86.19%</b>

*PH Mission: The mission of the Public Housing Department is to provide housing assistance to low-income and moderate-income families and individuals while maintaining "High Performer" designation under the U. S. Department of Housing and Urban Development's Public Housing Assessment System (PHAS) indicators and maintaining a high level of standards and professionalism in the day-to-day management of all public housing program components.*



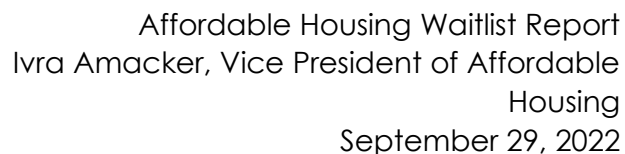
Affordable Housing Waitlist Report  
Ivra Amacker, Vice President of Affordable  
Housing  
September 29, 2022

### Affordable Housing Waitlist Activity Summary

Total number of scheduled appointments: 32  
Total number of missed appointments: 11  
Total number of move ins: 6

### Affordable Housing Waitlist Status

	AMP 1 Waitlist Totals	Total Units	0 BR	1 BR	2 BR	3 BR	4 BR	Total WL Applicants
<b>AMP 1 - 211 Units</b>	Monte Sano Village	72	0	18	21	28	5	
	* Number of Applicants on Waitlist		0	387	215	118	51	771
	Clarksdale	47	0	14	14	19	0	
	* Number of Applicants on Waitlist		0	284	162	90	4	540
	Scotland Villa	42	0	0	25	15	2	
	* Number of Applicants on Waitlist		0	0	134	73	50	257
	Wood Plaza	50	0	20	20	10	0	
	* Number of Applicants on Waitlist		0	235	126	65	0	426
	AMP 2 Waitlist Totals							<b>1994</b>
<b>AMP 2 - 198 Units</b>	Zion Terrace	98	0	28	39	27	4	
	* Number of Applicants on Waitlist		0	84	17	8	0	109
	Kelly Terrace	100	0	32	40	24	4	
	* Number of Applicants on Waitlist		0	147	32	3	1	183
	AMP 3 Waitlist Totals							<b>292</b>
<b>AMP 3 - 186 Units</b>	Turner Plaza	186	85	92	9			
	* Number of Applicants on Waitlist		0		1			1



	AMP 4 Waitlist Totals							<b>1</b>
<b>AMP 4 - 172 Units</b>	Ardenwood Village	93	0	20	30	35	8	
	* Number of Applicants on Waitlist		0	316	102	42	15	475
	Capital Square	50	0	12	19	17	2	
	* Number of Applicants on Waitlist		0	214	93	48	5	360
	Duane Street	29	0	0	15	13	1	
	* Number of Applicants on Waitlist		0	0	114	62	31	207
	AMP 5 Waitlist Totals							<b>1042</b>
<b>AMP 5 - 78 Units</b>	Sharlo Terrace	78	42	36				
	* Number of Applicants on Waitlist		9					9
	AMP 6 Waitlist Totals							<b>9</b>
<b>AMP 6 - 33 Units</b>	River South	33		2	18	13		
	* Number of Applicants on Waitlist			0	0	0		
<b>Total Applicants on all Affordable Housing Waitlists:</b>								<b>3337</b>

## Agenda Item – No. 11e

### Capital Improvements Report

**Action:**

No action required

**Staff Resource(s):**

Jarkus McKinley, Facilities Management

Ivra Amacker, Affordable Housing/Human Resources

**External Resource(s):**

HUD

General Contractors (various)

**Background/Explanation:**

Capital Fund Program

HUD Field Office approved Capital Fund plans and revisions.

REAC and Capital Improvements

Facilities Management assisted Affordable Housing with REAC preparations.

**Time Sensitivity:**

N/A

**Funding Source:**

COCC

Affordable Housing

**MWBE/DBE/Section 3:**

No reporting

**Attachments:**

N/A

*Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*

## Agenda Item – No. 11f

### Human Resources Report

#### **Action:**

No action required

#### **Staff Resource(s):**

**Ivra Amacker, Human Resources (Interim)**

J. Daniels, CEO

Janie Anderson, Housing Choice

April Downs, Chief of Staff

#### **External Resource(s):**

Paylocity

Indeed

LinkedIn

EmployBR

ZipRecruiter

#### **Background/Explanation:**

##### Vacant Positions

- Maintenance Technician (3)
- Assistant Community Manager (1)
- Human Resources Manager
- Marketing/Communications

##### Filled Positions

- Housing Analyst (2)
- Administrative Assistant (2)
- Maintenance Supervisor (3)
- Community Manager (2)
- Resident Services Coordinator
- Client Services Coordinator

##### Upcoming Projects

- Completion of job study
- Agency Employee Evaluation Plan to replace the Civil Service PES Evaluation Plan
- OGB Open Enrollment

#### **Time Sensitivity:**

- N/A

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*



**Funding Source:**

COCC

Housing Choice

Affordable Housing

**MWBE/DBE/Section 3:**

N/A

**Attachments:**

N/A

*Mission Statement*

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## Agenda Item – No. 12

### BR Choice Neighborhood Report

#### **Action:**

Discussion purposes only

#### **Staff Resource(s):**

Janelle Brown, CNI Director

J. Daniels, CEO

April Downs, Chief of Staff

#### **External Resource(s):**

HUD

Coats Rose

The Ascent Project

Integral Development

Build Baton Rouge

City-Parish (Co-Applicant)

Banks Law Firm

Louisiana Housing Corp. (LHC)

Remson Haley Herpin

Various community organizations

#### **Background/Explanation:**

In September 2019, EBRPHA was awarded the HUD FY18 Choice Neighborhood Implementation Grant in the amount of \$29,512,500 to transform the Ardenwood Village community and surrounding neighborhoods. This is a five-year grant executed with the collaboration of public and private sectors partners across all industries.

#### **Time Sensitivity:**

Grants expires September 2025

#### **Funding Source:**

Choice Neighborhood Grant

Developer Fee – operational

Grants (various) – operational/project-related

Private, Conventional Debt – project-related

LIHTC Tax Credit Equity – project-related

#### **MWBE/DBE/Section 3:**

DeCuir, Adams & Clark – MWBE Firm

Integral – MWBE Firm

#### **Attachments:**

BR Choice – September 2022 CNI Report

#### *Mission Statement*

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### ***People Strategy***

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People's Implementation Lead: The Ascent Project (TAP)  
CNI Budget: \$2.9M

- TAP's afterschool program resumed Monday, September 12<sup>th</sup>, the program will offer homework assistance, tutoring, arts & crafts and music enrichment.
- Baton Rouge Community College (BRCC) held an on-site seminar to discuss opportunities for individuals to receive guidance on secondary school re-entry or entry to a HiSet program (formerly GED), career counseling and workshops, and academic advice.
- Hosted annual Back to School Blast, provided free haircuts and backpacks filled with supplies.

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### ***Housing Strategy***

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Cypress at Ardendale  
Housing Implementation Lead: Integral Development, LLC  
Total Units: 434 (1BR/2BR/3BR/4BR)  
Replacement Units: 93  
CNI Budget: \$22.2M (Phases I-IV)

#### **Infrastructure**

- To date, we have identified 73% (\$7M) of the total infrastructure funds(\$15M) needed for the entire site. The city-parish metro council unanimously approved \$8M toward the Ardendale project, \$4M has been allocated toward infrastructure cost. We are working to receive commitment letters and identify remaining sources needed to install the infrastructure required to build all four phases of housing.

**GOAL: \$15,000,000**



### **Land Acquisition**

- Build Baton Rouge is working to transfer the land for the housing component to EBRPHA.

### **Phase I (predevelopment)**

- New construction 170-unit (1BR/2BR/3BR) family development with 40 replacement units for existing families at Ardenwood Village.
- The development team is working to close the financing for phase I by Dec. 2022.
- The city-parish metro council unanimously approved \$8M toward the Ardendale project, \$4M has been allocated toward housing and \$4M toward infrastructure cost.
- Applied for Fast Gap program funds in May of 2022 through the State of Louisiana OCD.
- Applied for AHP funds in April 2022 through the FHLB.
- Phase I has received a commitment of CDBG funds and 4% tax credits from the Louisiana Housing Corporation (LHC).

### **Cypress at Ardendale – Phase II (predevelopment)**

- New construction 70-unit (1BR/2BR) senior development with 4 replacement units for existing seniors at Ardenwood Village.
- Applied for AHP funds in April 2022 through the FHLB.
- Applied for Developer Assistance Plan (DAP) funds through LHC in September 2022.
- Starting schematic design process for senior building.
- Received 9% tax credit award in April 2022.

### **Cypress at Ardendale – Phase III (predevelopment)**

- New construction 94-unit (1BR/2BR/3BR) family development with 28 replacement units for existing families at Ardenwood Village.

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## ***Neighborhood Strategy***

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BR Choice Neighborhood Initiative Report  
Janelle Brown, CNI Director  
September 2022

Neighborhood Implementation Lead: Build BR  
CNI Budget: \$3M

- Design services have begun for Façade Improvement Program; also developing program guidelines and application.
- Reviewing call for artists submittals for murals and sculptures within corridor.
- Build Baton Rouge received its environmental clearance necessary for the disposition of land for the housing component.

## Agenda Item – No. 13

### Partners Southeast – COO Report

#### **Action:**

Discussion purposes only

#### **Staff Resource(s):**

**J. Daniels, CEO**

**Janelle Brown, Interim COO**

David Summers, Development Manager

April Downs, Chief of Staff

#### **External Resource(s):**

DeCuir, Adams & Clark

Louisiana Housing Corp. (LHC)

Coats Rose

Butler Snow

NDC/HSA/NDC Asset Management

Integral Development

Build Baton Rouge

City/Parish – OCD

Remson Haley Herpin

Coleman Partners

#### **Background/Explanation:**

Partners Southeast (Partners) is the real estate development arm of the EBRPHA. Partners' mission is "to enhance the quality of life for our residents by providing exceptional housing opportunities and positive economic value to the community." Partners' strategy is to secure LIHTCs to deliver affordable housing units throughout the Southeast, primarily in Baton Rouge.

#### **Time Sensitivity:**

N/A

#### **Funding Source:**

COCC – operational

Developer Fee – operational

Grants (various) – operational/project-related

Private, Conventional Debt – project-related

LIHTC Tax Credit Equity – project-related

#### **MWBE/DBE/Section 3:**

DeCuir, Adams & Clark – MWBE Firm

Integral – MWBE Firm

#### **Attachments:**

Partners Southeast – September 2022 COO Report

#### *Mission Statement*

*To provide and develop quality affordable housing opportunities for individuals and families while promoting self-sufficiency and neighborhood revitalization*

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**Under Construction**

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**Cypress Pinchback (formerly Cypress at Gardere)**

Development Type: New Construction  
Product: Senior  
Units: 99 (1BR/2BR)  
Financing: 4% LIHTC (closed April 2021)  
Platform: Direct Development Consultant (Integral Development)  
Total Dev. Cost: \$23.4M (\$236K/unit)  
MWBE: 30% - Construction (Tier 1)/9% - Professional  
Construction: 100% complete (completion Sept. 2022) est.

- Pinchback is 92% preleased, move-in are expected to begin at the end of the month

**Capstone at Scotlandville (formerly Elm Grove Apartments)**

Development Type: New Construction  
Product: Family  
Units: 84 (1BR/2BR)  
Financing: 9% LIHTC (closed Dec. 2021)  
Platform: Development Partner (Banyan Foundation)  
Total Dev. Cost: \$22.8M (\$271K/unit)  
MWBE: TBD  
Construction: 63% complete (completion Feb. 2023) est.

- Partnership with the Banyan Foundation, Partners will receive 15-20% of the developer fee.

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**Acquisitions**

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**North Boulevard**

- A site acquisition proposal was submitted to HUD in April 2022; it is anticipated the acquisition will be completed by the end of Q4 2022; the acquisition is delayed due to the environmental approval process taking longer than anticipated. The environmental clearance is needed to access our capital fund dollars that will be used as the required equity within the transaction.

- A purchase and sale agreement to acquire 4550 and 4560 North Blvd was entered into in June 2021; the site is 7.5 acres and is comprised of one 3 story building and three single story buildings totaling 56,000 square feet.

### **North Point Seniors (Phase I: Earl K. Long Redevelopment)**

Development Type: New Construction

Product: Mixed-Use

Units: TBD

Financing: TBD

Platform: Development Partner

Total Dev. Cost: TBD

MWBE: TBD

- Phase I will be built in partnership with the Banyan Foundation.
- Strategic discussions are ongoing to formulate the most feasible and mutually beneficial building design and layout.

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### ***Predevelopment***

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### **Cypress River Lofts (aka "River Flats")**

Development Type: New Construction

Product: Family

Units: 19 (1BR/3BR)

Financing: Constr./Perm. Debt (closing summer 2022) est.

Platform: Direct Development

Total Dev. Cost: \$6.7M (\$350K/unit) est.

MWBE: 30% - Construction (Tier 1)/ 0% - Professional

- Predevelopment activities continue for Cypress River Lofts, a mixed-income family deal in Old South Baton Rouge adjacent to the River South LIHTC site.
- An application for additional funding was submitted to OCD through the Louisiana Fast Gap program in May of 2022.
- The following conditional awards have been provided to date from LHC, OCD and the City/Parish Office of Community Development:
  - \$1.5M in CDBG- Disaster Recovery funds from LHC Neighborhood Landlord Rental Program for fifteen (15) units;
  - \$1.415M in CDBG entitlement funds from the Rebuilds Developer Program;





- \$800,000 in HOME Program funds from LHC's NOAH Program for four (4) units;
  - \$1.2M from Tax Credit Assistance Program (TCAP) Program Income
- Hancock Whitney Bank has issued a forward commitment for \$2.1M in permanent financing.
- In January 2021, Partners procured a new general contractor, Milton J. Womack; updated pricing was \$1.5M higher than the previous budget. Due to exorbitant construction costs, Partners is currently seeking \$1M in gap funding to move the transaction toward closing.

## **Cypress at Ardendale – Phase I**

Development Type: New Construction

Product: Family

Units: 170 (1BR/2BR/3BR)

Financing: 4% LIHTC (closing Dec. 2022) est.

Platform: Development Partner (Integral Development)

Total Dev. Cost: \$55.1M (\$324K/unit) est.

MWBE: 30% - Construction (Tier 1)/ 9% - Professional

- New construction 170-unit (1BR/2BR/3BR) family development with 40 replacement units for existing families at Ardenwood Village.
- The development team is working to close the financing for phase I by Dec. 2022.
- The city-parish metro council unanimously approved \$8M toward the Ardendale project, \$4M has been allocated toward housing and \$4M toward infrastructure cost.
- Applied for Fast Gap program funds in May of 2022 through the State of Louisiana OCD.
- Applied for AHP funds in April 2022 through the FHLB.
- Phase I has received a commitment of CDBG funds and 4% tax credits from the Louisiana Housing Corporation (LHC).

## **Cypress at Ardendale – Senior**

Development Type: New Construction

Product: Senior

Units: 70 (1BR/2BR)

Financing: 9% LIHTC (closing Q1 2023) est.

Platform: Development Partner (Integral Development)

Total Dev. Cost: \$20M (\$285K/unit) est.

MWBE: 30% - Construction (Tier 1)/ 9% - Professional

- New construction 70-unit (1BR/2BR) senior development with 4 replacement units for existing seniors at Ardenwood Village.
- Applied for AHP funds in April 2022 through the FHLB.
- Applied for Developer Assistance Plan (DAP) funds through LHC in September 2022.
- Starting schematic design process for senior building.
- Received 9% tax credit award in April 2022.

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### *Pipeline*

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#### **Cypress at Ardendale – Phase III**

Development Type: New Construction

Product: Family

Units: 95 (1BR/2BR/3BR)

Financing: 4% LIHTC

Platform: Development Partner (Integral)

Total Dev. Cost: \$30.1M (\$324K/unit) est.

MWBE: 30% - Construction (Tier 1)/ 9% - Professional

#### **Cypress Asante (Duane Street)**

Development Type: Renovation

Product: Family

Units: 29 (2BR/3BR/4BR)

Financing: TBD

Platform: Direct Development

Total Dev. Cost: \$7M (\$241K/unit) est.

MWBE: TBD

- A Historic Tax Credit application was submitted in March 2022.
- We were unsuccessful in receiving a LIHTC award from the 2022-2023 QAP; we are continuing to explore alternative financing options.



**The Residences at Northview**

Development Type: New Construction  
Product: Family  
Units: 8 (1BR/2BR)  
Financing: CDBG  
Platform: Direct Development  
Total Dev. Cost: \$2M (\$250K/unit) est.  
MWBE: TBD

- We received a commitment of \$300k for each of the 4-unit buildings from LHC's Neighborhood Landlord Rental Program (NLRP) Phase II.
- A NOAH funding application through LHC was submitted in April 2020; conversations are ongoing with LHC regarding funding availability.
- Alternative financing options are also being pursued.