

Streamlined Annual PHA Plan <i>(High Performer PHAs)</i>	U.S. Department of Housing and Urban Development Office of Public and Indian Housing	OMB No. 2577-0226 Expires: 02/29/2016
--	---	--

Purpose. The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families

Applicability. Form HUD-50075-HP is to be completed annually by **High Performing PHAs**. PHAs that meet the definition of a Standard PHA, Troubled PHA, HCV-Only PHA, Small PHA, or Qualified PHA do not need to submit this form.

Definitions.

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

A.	PHA Information.																														
<p>PHA Name: LOWELL HOUSING AUTHORITY (LHA) PHA Code: MA001 PHA Type: <input type="checkbox"/> Small <input checked="" type="checkbox"/> High Performer PHA Plan for Fiscal Year Beginning: (MM/YYYY): 10/01/2020 PHA Inventory (Based on Annual Contributions Contract (ACC) units at time of FY beginning, above) Number of Public Housing (PH) Units: 1,682 Number of Housing Choice Vouchers (HCVs): 1,331 Total Combined: 3,013 PHA Plan Submission Type: <input checked="" type="checkbox"/> Annual Submission <input type="checkbox"/> Revised Annual Submission</p> <p>Availability of Information. In addition to the items listed in this form, PHAs must have the elements listed below readily available to the public. A PHA must identify the specific location(s) where the proposed PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and proposed PHA Plan are available for inspection by the public. Additionally, the PHA must provide information on how the public may reasonably obtain additional information of the PHA policies contained in the standard Annual Plan but excluded from their streamlined submissions. At a minimum, PHAs must post PHA Plans, including updates, at each Asset Management Project (AMP) and main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official website. PHAs are also encouraged to provide each resident council a copy of their PHA Plans.</p> <p>Please See Attachment A for the Legal Notice regarding the Public Comment Period for the Annual Plan.</p> <p><input type="checkbox"/> PHA Consortia: (Check box if submitting a Joint PHA Plan and complete table below)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th rowspan="2">Participating PHAs</th> <th rowspan="2">PHA Code</th> <th rowspan="2">Program(s) in the Consortia</th> <th rowspan="2">Program(s) not in the Consortia</th> <th colspan="2">No. of Units in Each Program</th> </tr> <tr> <th>PH</th> <th>HCV</th> </tr> </thead> <tbody> <tr> <td>Lead PHA:</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>						Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program		PH	HCV	Lead PHA:																	
Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program																											
				PH	HCV																										
Lead PHA:																															

B.	Annual Plan Elements
B.1	<p>Revision of PHA Plan Elements.</p> <p>(a) Have the following PHA Plan elements been revised by the PHA since its last Annual <u>PHA Plan</u> submission?</p> <p>Y N</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Statement of Housing Needs and Strategy for Addressing Housing Needs.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Financial Resources.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Rent Determination.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Homeownership Programs.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Safety and Crime Prevention.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Pet Policy.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Substantial Deviation.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Significant Amendment/Modification</p> <p>(b) The PHA must submit its Deconcentration Policy for Field Office Review.</p> <p>An updated Deconcentration Analysis has been included. Please see Attachment B.</p> <p>The LHA adopted temporary waivers to the Low Rent Public Housing Administrative Plan and the Housing Choice Voucher Program Administrative Plan related to the COVID health emergency. Please see Attachment C.</p> <p>(c) If the PHA answered yes for any element, describe the revisions for each element below:</p> <p>The Financial Resources report has been revised to show updated financial information. Please see Attachment D.</p>
B.2	<p>New Activities.</p> <p>(a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?</p> <p>Y N</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Hope VI or Choice Neighborhoods.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Mixed Finance Modernization or Development.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Demolition and/or Disposition.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Conversion of Public Housing to Tenant Based Assistance.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Conversion of Public Housing to Project-Based Assistance under RAD.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Project Based Vouchers.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Units with Approved Vacancies for Modernization.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Other Capital Grant Programs (i.e., Capital Fund Community Facilities Grants or Emergency Safety and Security Grants).</p> <p>(b) If any of these activities are planned for the current Fiscal Year, describe the activities. For new demolition activities, describe any public housing development or portion thereof, owned by the PHA for which the PHA has applied or will apply for demolition and/or disposition approval under section 18 of the 1937 Act under the separate demolition/disposition approval process. If using Project-Based Vouchers (PBVs), provide the projected number of project based units and general locations, and describe how project basing would be consistent with the PHA Plan.</p> <p>Through its non-profit affiliate Revitalization Effort Toward New Urbanism (RENU), the final phase of development will be completed at the River's Edge on the Concord. The Development Plan must be approved by the City of Lowell and the Massachusetts Department of Housing and Community Development (DHCD) before work can commence.</p> <p>The LHA will seek approval from the Department of Housing and Urban Development (HUD) to take units off-line for modernization purposes, as needed.</p> <p>The LHA will continue with the disposition of 87 scattered site units in AMP 2, in compliance with the approval letter issued by the Special Applications Center (SAC) of the Department of Housing and Urban Development (HUD) dated August 30, 2018.</p> <p>The LHA may use Project Based Vouchers as part of the below market disposition to local non-profit agencies. The LHA may also utilize PBV with development activities intended to expand the supply of affordable housing, but to do so in a manner that affirmatively furthers fair housing.</p> <p>The LHA received a Emergency Safety and Security Grant in the amount of \$116,816.00 to address crime at the North Common Village (AMP1) through increased camera surveillance.</p>

B.3	<p>Progress Report.</p> <p>Provide a description of the PHA's progress in meeting its Mission and Goals described in the PHA 5-Year Plan.</p> <p>A Progress Report has been included. Please see Attachment E.</p>
B.4.	<p>Most Recent Fiscal Year Audit.</p> <p>(a) Were there any findings in the most recent FY Audit?</p> <p>Y N <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>(b) If yes, please describe:</p>
Other Document and/or Certification Requirements.	
C.1	<p>Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan</p> <p><u>Form 50077-ST-HCV-HP, Certification of Compliance with PHA Plans and Related Regulations</u>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>
C.2	<p>Civil Rights Certification.</p> <p><u>Form 50077-ST-HCV-HP, Certification of Compliance with PHA Plans and Related Regulations</u>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>
C.3	<p>Resident Advisory Board (RAB) Comments.</p> <p>(a) Did the RAB(s) provide comments to the PHA Plan?</p> <p>Y N <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations.</p> <p>The Agenda and Minutes of the RAB Meeting are attached. Please see Attachment F.</p>
C.4	<p>Certification by State or Local Officials.</p> <p><u>Form HUD 50077-SL, Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan</u>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>

D	Statement of Capital Improvements. Required in all years for all PHAs completing this form that administer public housing and receive funding from the Capital Fund Program (CFP).
D.1	<p>Capital Improvements. Include a reference here to the most recent HUD-approved 5-Year Action Plan (HUD-50075.2) and the date that it was approved by HUD.</p> <p>The most recent 5-Year Action Plan was approved on October 31, 2019.</p> <p>A Statement of Capital Improvements is included. Please see attachment G.</p>

Instructions for Preparation of Form HUD-50075-HP Annual Plan for High Performing PHAs

A. PHA Information. All PHAs must complete this section.

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

PHA Consortium: Check box if submitting a Joint PHA Plan and complete the table. (24 CFR §943.128(a))

B. Annual Plan.

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

Identify specifically which plan elements listed below that have been revised by the PHA. To specify which elements have been revised, mark the "yes" box. If an element has not been revised, mark "no."

☐ **Statement of Housing Needs and Strategy for Addressing Housing Needs.** Provide a statement addressing the housing needs of low-income, very low-income and extremely low-income families and a brief description of the PHA's strategy for addressing the housing needs of families who reside in the jurisdiction served by the PHA. The statement must identify the housing needs of (i) families with incomes below 30 percent of area median income (extremely low-income), (ii) elderly families and families with disabilities, and (iii) households of various races and ethnic groups residing in the jurisdiction or on the waiting list based on information provided by the applicable Consolidated Plan, information provided by HUD, and other generally available data. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. For years in which the PHA's 5-Year PHA Plan is also due, this information must be included only to the extent it pertains to the housing needs of families that are on the PHA's public housing and Section 8 tenant-based assistance waiting lists. 24 CFR §903.7(a)(1) and 24 CFR §903.12(b). Provide a description of the PHA's strategy for addressing the housing needs of families in the jurisdiction and on the waiting list in the upcoming year. For years in which the PHA's 5-Year PHA Plan is also due, this information must be included only to the extent it pertains to the housing needs of families that are on the PHA's public housing and Section 8 tenant-based assistance waiting lists. 24 CFR §903.7(a)(2)(ii) and 24 CFR §903.12(b).

☐ **Deconcentration and Other Policies that Govern Eligibility, Selection and Admissions.** Describe the PHA's admissions policy for deconcentration of poverty and income mixing of lower-income families in public housing. The Deconcentration Policy must describe the PHA's policy for bringing higher income tenants into lower income developments and lower income tenants into higher income developments. The deconcentration requirements apply to general occupancy and family public housing developments. Refer to 24 CFR §903.2(b)(2) for developments not subject to deconcentration of poverty and income mixing requirements. 24 CFR §903.7(b). Describe the PHA's procedures for maintaining waiting lists for admission to public housing and address any site-based waiting lists. 24 CFR §903.7(b). A statement of the PHA's policies that govern resident or tenant eligibility, selection and admission including admission preferences for both public housing and HCV. (24 CFR §903.7(b)) Describe the unit assignment policies for public housing. 24 CFR §903.7(b)

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

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

☐ **Homeownership Programs.** A description of any homeownership programs (including project number and unit count) administered by the agency or for which the PHA has applied or will apply for approval. For years in which the PHA's 5-Year PHA Plan is also due, this information must be included only to the extent that the PHA participates in homeownership programs under section 8(y) of the 1937 Act. (24 CFR §903.7(k)) and 24 CFR §903.12(b).

☐ **Safety and Crime Prevention (VAWA).** A description of: 1) Any activities, services, or programs provided or offered by an agency, either directly or in partnership with other service providers, to child or adult victims of domestic violence, dating violence, sexual assault, or stalking; 2) Any activities, services, or programs provided or offered by a PHA that helps child and adult victims of domestic violence, dating violence, sexual assault, or stalking, to obtain or maintain housing; and 3) Any activities, services, or programs provided or offered by a public housing agency to prevent domestic violence, dating violence, sexual assault, and stalking, or to enhance victim safety in assisted families. (24 CFR §903.7(m)(5))

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

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

☐ **Significant Amendment/Modification.** PHA must provide its criteria for determining a "Significant Amendment or Modification" to its 5-Year and Annual Plan. Should the PHA fail to define "significant amendment/modification", HUD will consider the following to be "significant amendments or modifications": a) changes to rent or admissions policies or organization of the waiting list; b) additions of non-emergency public housing CFP work items (items not included in the current CFP Annual Statement or CFP 5-Year Action Plan); or c) any change with regard to demolition or disposition, designation, homeownership programs or conversion activities. See guidance on HUD's website at: Notice PIH 1999-51. (24 CFR §903.7(r)(2)(ii))

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

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

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

☐ **Hope VI.** 1) A description of any housing (including project name, number (if known) and unit count) for which the PHA will apply for HOPE VI; and 2) A timetable for the submission of applications or proposals. The application and approval process for Hope VI is a separate process. See guidance on HUD's website at: <http://www.hud.gov/offices/pih/programs/ph/hope6/index.cfm>. (Notice PIH 2010-30)

☐ **Mixed Finance Modernization or Development.** 1) A description of any housing (including name, project number (if known) and unit count) for which the PHA will apply for Mixed Finance Modernization or Development; and 2) A timetable for the submission of applications or proposals. The application and approval process for Mixed Finance Modernization or Development is a separate process. See guidance on HUD's website at:

<http://www.hud.gov/offices/pih/programs/ph/hope6/index.cfm>. (Notice PIH 2010-30)

☐ **Demolition and/or Disposition.** Describe any public housing projects owned by the PHA and subject to ACCs (including name, project number and unit numbers [or addresses]), and the number of affected units along with their sizes and accessibility features) for which the PHA will apply or is currently pending for demolition or disposition; and (2) A timetable for the demolition or disposition. This statement must be submitted to the extent that approved and/or pending demolition and/or disposition has changed. The application and approval process for demolition and/or disposition is a separate process. See guidance on HUD's website at: http://www.hud.gov/offices/pih/centers/sac/demo_dispo/index.cfm. (24 CFR §903.7(h))

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

☐ **Project-Based Vouchers.** Describe any plans to use HCVs for new project-based vouchers. (24 CFR §983.57(b)(1)) If using project-based vouchers, provide the projected number of project-based units and general locations, and describe how project-basing would be consistent with the PHA Plan.

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

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

B.4 Most Recent Fiscal Year Audit. If the results of the most recent fiscal year audit for the PHA included any findings, mark "yes" and describe those findings in the space provided. (24 CFR §903.7(p))

C. Other Document and/or Certification Requirements

C.1 Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan. Provide a certification that the following plan elements have been revised, provided to the RAB for comment before implementation, approved by the PHA board, and made available for review and inspection by the public. This requirement is satisfied by completing and submitting form HUD-50077 SM-HP.

C.2 Civil Rights Certification. Form HUD-50077 SM-HP, *PHA Certifications of Compliance with the PHA Plans and Related Regulation*, must be submitted by the PHA as an electronic attachment to the PHA Plan. This includes all certifications relating to Civil Rights and related regulations. A PHA will be considered in compliance with the AFFH Certification if: it can document that it examines its programs and proposed programs to identify any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with the local jurisdiction to implement any of the jurisdiction's initiatives to affirmatively further fair housing; and assures that the annual plan is consistent with any applicable Consolidated Plan for its jurisdiction. (24 CFR §903.7(o))

C.3 Resident Advisory Board (RAB) comments. If the RAB provided comments to the annual plan, mark "yes," submit the comments as an attachment to the Plan and describe the analysis of the comments and the PHA's decision made on these recommendations. (24 CFR §903.13(c), 24 CFR §903.19)

C.4 Certification by State or Local Officials. Form HUD-50077-SL, *Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan*, must be submitted by the PHA as an electronic attachment to the PHA Plan. (24 CFR §903.15)

D. Statement of Capital Improvements. PHAs that receive funding from the Capital Fund Program (CFP) must complete this section. (24 CFR 903.7 (g))

D.1 Capital Improvements. In order to comply with this requirement, the PHA must reference the most recent HUD approved Capital Fund 5 Year Action Plan.

PHAs can reference the form by including the following language in Section C. 8.0 of the PHA Plan Template: "See HUD Form 50075.2 approved by HUD on XX/XX/XXXX."

This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937, as amended, which introduced the 5-Year and Annual PHA Plan. The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission, goals and objectives for serving the needs of low-income, very low-income, and extremely low-income families.

Public reporting burden for this information collection is estimated to average 16.64 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

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

ATTACHMENT A

HOUSING AUTHORITY OF THE CITY OF LOWELL

LEGAL NOTICE

On July 24, the Year 2020, the Draft Annual Plan of the Lowell Housing Authority (LHA), as required under Section 511 of the Quality Housing and Work Responsibility Act (QHWRA) of 1998, is available for a forty-five (45) day public review and comment period. A copy of the draft Annual Plan is available for review at the Executive Office, located at 350 Moody Street, Lowell, MA, during regular office hours and can be found on our website www.lhma.org. The Executive Office is wheelchair accessible. Reasonable accommodations will be provided to persons requesting assistance. The Annual Plan is scheduled to be submitted to the U.S. Department of Housing and Urban Development (HUD) on or before September 16, 2020.

On September 9, 2020 at 3:30 p.m. a Public Hearing will be held to accept oral or written comments on the Plan. Written comments will also be accepted at the Executive office until 4:30 p.m. on September 9, 2020. The LHA will conduct the Public Hearing virtually due to social distancing guidelines related to the COVID-19 state of emergency.

Hearing location: Join Zoom Meeting: <https://zoom.us/j/93896728828>
Toll-Free Phone: 877-853-5247 or 888-788-0099
Meeting ID: 938 9672 8828

Anyone seeking further information should contact the Authority. The telephone number for the Authority is (978) 364-5311. The LHA can be reached by TDD at 1-800-545-1333, Extension 178.

ATTACHMENT B

Deconcentration Analysis and Admissions Policy for De-Concentration

Deconcentration Analysis June, 2020

Site	Average			Avg Income Per Development	Does LHA Develop Fall b/w Ranges
	Actual Same units <u>Average</u>	85% of PHA Wide Avg Income (Avg x .85)	115% of PHA Wide Avg Income (Avg x 1.15)		
MA 1-1	18,586	15,798	21,374	17,065	YES
MA 1-2 / 1-17	18,586	15,798	21,374	22,408	NO
MA 1-7	18,586	15,798	21,374	22,174	NO
MA 1-12	18,586	15,798	21,374	21,935	NO
MA 1-14	18,586	15,798	21,374	18,053	YES

MA 1-2 / 1-17 Average falls above range by \$ 1,032

MA 1-7 Average falls above range by \$ 800

MA 1-12 Average falls above range by \$ 562

The Lowell Housing Authority has reviewed the analysis and has determined that their admission preferences in their deconcentration policy have not improved the situation since the last report. Despite MA 1-7 being over income, the Authority has had success in reducing income at the Harold Hartwell Development by an average of \$236 per unit. This has brought this development to within \$800 of the range, but the development remains over 115%. The LHA will monitor on a quarterly basis and if the trends cannot be changed, the Authority will use the skipping technique to ensure households with incomes below the combined average will be given first preference for vacancies at the locations above.

The following is an extract from the Low Rent Public Housing Administrative Plan, approved by the Board on July 11th, 2007 which applies to this issue:

Policies on Selection and Admission of Applicants from Waiting List

Subsequent to verification of the information provided in the full application, LHA will group the applications into two tiers.

Tier 1 will include all applicants with incomes that do not exceed 30 % of median income for the Lowell area (NOTE: Families in this income category are termed Extremely Low-Income (ELI) families).

Tier 2 will include all applicants with incomes that exceed 30 % of median income but do not exceed 80 % of median income for the area (Such families are termed Low-Income Families).

Within each tier, families with local preferences will be listed first. Those preference-holders meeting the ranking preference described in Chapter 4.5 will be filed first by earliest date of pre-application, followed by preference-holders not meeting the ranking preference ordered by earliest date of pre-application.

In order to assure that the statutory income-targeting requirement that "not less than 40 % of the families admitted to a PHA's LRPH program during the PHA fiscal year from the PHA waiting list be ELI families", 4 of the initial 10 referrals to briefings shall be families on the waiting list who are Tier 1 families and 6 of the initial 10 referrals to briefings shall be Tier 2 families that are preference-holders. If there is not a sufficient number of Tier 2 preference-holders, one or more of the referrals which were to be initially Tier 2 families will Tier 1 preference-holders.

In addition, if the agency's deconcentration analysis indicates that there are any developments which require targeted selection of below average or above average income families then a further tiering of applications will be done.

Tier 3 will include all covered applicants whose incomes are less than 85% of the average income of all covered families.

Tier 4 will include all covered applicants whose incomes are more than 115% of the average income of all covered families.

As units become available for any covered development under the deconcentration analysis, then in addition to the targeting tiers and procedures, skipping will be applied to admit only those applicants who are also in Tier 3 or Tier 4 as may be required.

Decapitalization Analysis

June, 2020

PHA total	BDR			BR Adj	
	#	\$	Factor	#	Factor
0	15.00	0.70	11.20		
1	211.00	0.85	179.35		
2	321.00	1.00	321.00		
3	184.00	1.25	230.00	Actual	Now
4	48.00	1.40	67.20	Same	Same
5	15.00	1.61	24.15	Actual	Now
6	5.00	1.82	9.10	Actual	Now
	509.00		851.70	1.05	

MA 1-1 MA 1-16	BDR			BR Adj		Now Actual Same Now	85% Develop Fall Range
	#	\$	Factor	#	Factor		
0	-	0.70	-				
1	181.00	0.85	152.85				
2	215.00	1.00	215.00				
3	110.00	1.25	137.50				
4	10.00	1.40	14.00	Actual Develop	Now Same		
5	-	1.61	-				
6	-	1.82	-				
	521.00		528.35	1.01			

MA 1-2 & 1-17 Tr / Res	BDR			BR Adj		Now Actual Same Now	85% Develop Fall Range
	#	\$	Factor	#	Factor		
0	18.00	0.70	12.60				
1	18.00	0.85	15.30				
2	82.00	1.00	82.00				
3	18.00	1.25	22.50				
4	14.00	1.40	19.60	Actual Develop	Now Same		
5	-	1.61	-				
6	-	1.82	-				
	150.00		172.00	1.04			

MA 1-7	BDR			BR Adj		Now Actual Same Now	85% Develop Fall Range
	#	\$	Factor	#	Factor		
0	-	0.70	-				
1	1.00	0.85	0.85				
2	19.00	1.00	19.00				
3	8.00	1.25	10.00				
4	3.00	1.40	4.20	Actual Develop	Now Same		
5	3.00	1.61	4.83				
6	-	1.82	-				
	25.00		31.00	1.01			

MA 1-12	BDR			BR Adj		Now Actual Same Now	85% Develop Fall Range
	#	\$	Factor	#	Factor		
0	-	0.70	-				
1	-	0.85	-				
2	10.00	1.00	10.00				
3	17.00	1.25	21.25				
4	7.00	1.40	9.80	Actual Develop	Now Same		
5	2.00	1.61	3.22				
6	5.00	1.82	9.10				
	41.00		53.37	1.0			

MA 1-14	BDR			BR Adj		Now Actual Same Now	85% Develop Fall Range
	#	\$	Factor	#	Factor		
0	-	0.70	-				
1	-	0.85	-				
2	6.00	1.00	6.00				
3	23.00	1.25	28.75				
4	12.00	1.40	16.80	Actual Develop	Now Same		
5	10.00	1.61	16.10				
6	-	1.82	-				
	51.00		67.65	1.33			

Per Tha's MIS Report

	Total Income	Now	Devil Avg	
MA 1-1	5,510,771.00	560	17,021.54	
MA 1-16	377,213.00	18	20,956.28	
MA 1-1	5,887,984.00	578	17,280.37	
MA 1-17	183,380.00	2	91,690.00	1-2 & 1-17 m
MA 1-7	3,650,450.00	61	59,843.28	23,983.42
MA 1-7	690,274.00	28	24,688.36	
MA 1-12	942,280.00	35	26,922.29	
MA 1-14	923,162.00	30	30,770.73	
MA 1-2	3,324,240.00	240.00	13,850.00	
	10,222,224.00	777.00	13,156.02	

ATTACHMENT C

Temporary Amendments to the Low Rent Public Housing Program Administrative Plan and the Housing Choice Voucher Program Administrative Plan

Coronavirus Aid, Relief and Economic Security Act

In accordance with the Coronavirus Aid, Relief and Economic Security (CARES) Act, the US Department of Housing and Urban Development (HUD) has established temporary waivers and alternative processes for certain regulatory and statutory requirements of the Low Rent Public Housing (LRPH) Program and the Housing Choice Voucher (HCV) Programs. The implementation of these waivers is at the discretion of the Lowell Housing Authority (LHA).

During this health emergency, the LHA is making every attempt to maintain the safety of our residents, property owners and dedicated staff. The LHA has adopted the following amendments to our Administrative Plans in order to ensure safe program operation, while maintaining program integrity to the fullest extent possible. The following changes have been adopted by the LHA:

AMENDMENTS TO THE LOW RENT PUBLIC HOUSING (LRPH) ADMINISTRATIVE PLAN AND THE HOUSING CHOICE VOUCHER (HCV) ADMINISTRATIVE PLAN

FAMILY INCOME AND COMPOSITION: ANNUAL INCOME

LRPH Administrative Plan -- Chapter 11, Section A,B,C,D,E

HCV Administrative Plan -- Chapter 11, Section A,B,C,D,E

Temporary amendment will expire on December 31, 2020 or at a time determined by HUD through waiver extension.

The LHA is required to reexamine each family's income and composition annually. During this health emergency, the LHA will work remotely with families to conduct annual recertifications of income and family composition. To do this, a process has been implemented to mail recertification documents requiring signatures to families, conduct telephone interviews, and request documentation, if available, to be provided via electronic methods or through the US Postal Service. A stamped, addressed envelope is included in the packet to ensure that documents requiring signatures and supporting documentation will be mailed back to the LHA.

In the event that the LHA is unable to process an annual recertification of family income and composition, tenant rent will be based on the most recent certification on file. The LHA will conduct a recertification of family income at the earliest possible date prior to December 31, 2020. For families participating in the Housing Choice Voucher Program, an increased Payment Standard will be applied to determine tenant rent, effective on the date of the annual recertification.

FAMILY INCOME AND COMPOSITION: ANNUAL REEXAMINATION OF FAMILY INCOME – VERIFICATION REQUIREMENTS

LRPH Administrative Plan – Chapter 7, Section A,B,C,D,E

HCV Administrative Plan – Chapter 7, Section A,B,C,D,E

Temporary amendment will expire on July 31, 2020, or at a time determined by HUD through waiver extension.

The LHA is required to verify all information that is used to establish tenant rent and is also required to obtain a family's consent to collect the information. During this health emergency, at the time of the annual recertification of income, the LHA will request verification of the most recent income and family composition information that is readily available to the family. Electronically transmitted photos of income and family composition documentation will be accepted. Documentation may also be sent through the US Postal Service. If documentation is not readily available, and income or family composition information cannot be verified through third party methods, the LHA will accept a family members self-certification verbally (documented by LHA staff) or through electronic communications.

LHA staff will continue to utilize Enterprise Income Verification (EIV) information as a means of verification, to the fullest extent possible. The LHA will monitor EIV information going forward, and any discrepancies identified will be addressed through enforcement procedures described in the Administrative Plan.

FAMILY INCOME AND COMPOSITION: INTERIM CERTIFICATION OF INCOME

LRPH Administrative Plan – Chapter 11, Section F,G

HCV Administrative Plan – Chapter 11, Section F,G

Temporary amendment will expire on July 31, 2020, or at a time determined by HUD through waiver extension.

Interim certifications are completed when a family has a change in income or composition. At the time a family requests an interim certification of income, the LHA will request verification of the change. The LHA will make every attempt to complete an interim determination of rent within a reasonable time period. The LHA will request income and family composition information that is readily available to the family. Electronically transmitted photos of income and family composition information will be accepted. Documentation may also be sent through the US Postal Service. If documentation is not readily available, and income or family composition information cannot be verified through third party methods, the LHA will accept a family members self-certification verbally (documented by LHA staff) or through electronic communications.

LHA staff will continue to utilize and Enterprise Income Verification (EIV) information as a means of verification, to the fullest extent possible. The LHA will monitor EIV information going forward and any discrepancies identified will be addressed through enforcement procedures described in the Administrative Plan.

AMENDMENTS TO THE HOUSING CHOICE VOUCHER (HCV) PROGRAM ADMINISTRATIVE PLAN

HOUSING QUALITY STANDARDS (HQS) - INITIAL INSPECTIONS

HCV Administrative Plan – Chapter 8, Section A, G

Temporary amendment will expire on July 31, 2020, or October 31, 2020, as described below. This amendment may be extended to a time determined by HUD through waiver extension.

HUD requires that all units occupied by families receiving Housing Choice Voucher Program assistance meet Housing Quality Standard (HQS). The LHA is committed to ensuring the safety of our families who have submitted a Request for Tenancy Approval to lease a unit. During this health emergency, the LHA will make every attempt to conduct initial inspections of apartments. To do this, the LHA will inspect vacant units utilizing safety protocols of social distancing and the use of protective equipment. Upon inspection, property owners will be asked to provide unit access to our inspector, but remain outside the unit until the inspection is completed.

During this time, initial inspections of occupied units cannot be conducted. In extreme cases, the LHA will accept a property owner's certification that he/she has no reasonable basis to have knowledge that life threatening conditions exist in the unit. As determined by HUD, property owner certifications will only be accepted through July 31, 2020 (or at a time determined by HUD through waiver extension). In this case, an initial inspection will be conducted by the LHA on the soonest possible date prior to October 31, 2020 (or at a time determined by HUD through waiver extension).

The LHA retains the right to conduct an HQS inspection on any assisted unit, at any time. Additionally, the LHA may conduct an Initial inspection on a unit if such inspection is determined to be warranted by the LHA.

The process described above will cover initial inspections for the HCV Project Based Program, including Project Based turn-over inspections or inspections to add or substitute units under the Project Based Program.

HOUSING QUALITY STANDARDS (HQS) – BIENNIAL INSPECTIONS

HCV Administrative Plan – Chapter 8, Section I

Temporary amendment will expire on October 31, 2020, or at a time determined by HUD through waiver extension.

The LHA is required to conduct inspections of units under contract no later than 24 months from the date of the most recent inspection. During this health emergency the LHA will delay biennial inspections for both tenant based and project based units. All delayed inspections will be completed as soon as reasonably possible on or before October 31, 2020, or at a time determined by HUD through waiver extension.

HOUSING QUALITY STANDARDS (HQS) – INTERIM INSPECTIONS –SPECIAL INSPECTIONS

HCV Administrative Plan – Chapter 8, Section J,L

Temporary amendment will expire on July 31, 2020, or at a time determined by HUD through waiver extension.

Upon notification to the LHA by a family or government official of a life-threatening condition in an assisted unit, the LHA will immediately notify the property owner. The property owner will be required to correct the life-threatening deficiency within 24 hours of the LHA notification. The property owner MUST provide documentation of the correction through a text or email, including a photo and written verification that the deficiency has been corrected. In the case of a non-life threatening deficiency, the LHA will notify the property owner in writing and require that correction be made within 30 days. A property owner's failure to comply will result in further action as described in the Administrative Plan which may include suspension of subsidy and/or termination of the Housing Assistance Payments Contract.

HOUSING QUALITY STANDARDS (HQS) – QUALITY CONTROL INSPECTIONS

HCV Administrative Plan – Chapter 8, Section K

Temporary amendment will expire on October 31, 2020, or at a time determined by HUD through waiver extension.

HUD requires an LHA supervisor or other qualified person to conduct quality control inspections of sample units annually. During this health emergency, the LHA will suspend HQS supervisory inspections.

HOUSING QUALITY STANDARDS – SPACE AND SECURITY – DETERMINING FAMILY UNIT SIZE

HCV Administrative Plan – Chapter 5, Section C

Temporary amendment will expire on April 10, 2021, or at a time determined by HUD through waiver extension.

There are minimum space requirements (occupancy standards) established to determine the appropriate number of bedrooms for each family participating in the HCV Program and the HCV Project Based Program. With the addition of a family member into an assisted unit, the unit may not meet the space and security standards. During this health emergency, the LHA will waive these requirements and tenants with family composition changes will be allowed to remain in the unit until the end of the lease.

term or April 10, 2020, whichever comes first. Families will not be allowed to extend leases or enter into new leases for units where the space and security standards are not met.

HOUSING QUALITY STANDARDS (HQS)–INITIAL INSPECTIONS FOR HOMEOWNERSHIP

Temporary amendment will expire on July 31, 2020, or at a time determined by HUD through waiver extension.

HCV Administrative Plan – Appendix C – Homeownership Program

Two pre-purchase inspections are required in order for a home to be considered for assistance. The LHA must conduct an initial HQS inspection and an inspection must be performed by an independent professional home inspector. During this health emergency, initial HQS inspections for homeownership will not be conducted. The LHA will accept the report of an independent professional home inspector and will review the information provided. The LHA reserves the right to disapprove a unit for assistance under the homeownership program if the information provided shows that the home is not compliant with Housing Quality Standards.

HOUSING CHOICE VOUCHER PROGRAM – HCV ORAL BRIEFING

HCV Administrative Plan – Chapter 5, Section A

Temporary amendment will expire on July 31, 2020, or at a time determined by HUD through waiver extension.

During this health emergency, the LHA will conduct HCV Briefings through webcast or video call. Briefings will be conducted in English, Spanish and Khmer, as needed. Briefing packets, with required documentation, will be mailed to families in advance of the webcast or video call. Special accommodations will be made for those who are vision or hearing impaired.

HOUSING CHOICE VOUCHER PROGRAM – VOUCHER TERM, EXTENSIONS, AND SUSPENSIONS

HCV Administrative Plan – Chapter 5, Section F

Temporary amendment will expire on July 31, 2020, or at a time determined by HUD through waiver extension.

The maximum term for a Voucher holder in housing search is a period of up to 120 days. During this health emergency, the LHA will consider extensions beyond this term to ensure that families in need of rental assistance are housed. The Division Director of Leased Housing Programs will make determinations on extensions beyond the 120 term based on individual situations. Families will be required to communicate housing search status to the Division Director of Leased Housing Programs during the 120 day time period.

HOUSING CHOICE VOUCHER PROGRAM – ABSENCE FROM UNIT – MANDATORY POLICIES AND OTHER AUTHORIZED TERMINATIONS

HCV Administrative Plan – Chapter 12, Section D

Temporary amendment will expire on December 31, 2020, or at a time determined by HUD through waiver extension.

Families living in units under a Housing Assistance Payments (HAP) Contract may not be absent from the unit for more than 180 days. During this health emergency, the LHA may continue HAP payments and not terminate HAP contracts due to extenuating circumstances including hospitalization, inability to travel due to restrictions, or other reasons. A final determination to continue HAP payments will be made by the Division Director of Leased Housing Programs after consultation with the family.

HOUSING CHOICE VOUCHER PROGRAM – AUTOMATIC TERMINATION OF HOUSING ASSISTANCE PAYMENTS CONTRACT – FAMILY NO LONGER REQUIRES ASSISTANCE

HCV Administrative Plan – Chapter 12, Section A

Temporary amendment will expire on December 31, 2020, or at a time determined by HUD through waiver extension.

When a family's income increases and a determination is made that 30% of adjusted income exceeds the Payment Standard for the leased unit, and the Housing Assistance Payment is \$0, the family is placed in a suspension period for 180 days. During the suspension period, families who have a reduction in income will continue to receive rental assistance. Those that do not have a reduction in income will be subject to a termination of the Housing Assistance Payments Contract at the end of the 180 day suspension period. During this health emergency, the LHA may consider an extension beyond the 180 day suspension period. Extension requests may be authorized by the Division Director of Leased Housing Programs after careful review of a family's situation. Extensions will not be granted beyond December 31, 2020.

HOUSING CHOICE VOUCHER PROGRAM – INCREASE IN PAYMENT STANDARD UNDER HAP CONTRACT TERM – CHANGES IN PAYMENT STANDARDS AND UTILITY ALLOWANCE

HCV Administrative Plan – Chapter 11, Section H

Temporary amendment will expire on December 31, 2020, or at a time determined by HUD through waiver extension.

Increased Payment Standards are applied to calculate tenant rent at the time of the regular recertification of family income. During this health emergency, the LHA may apply an increased Payment Standard at the time of interim certification of income, or at the time an owner requests a rent increase. In cases where an annual reexamination of family income has been delayed, the LHA will apply the increased Payment Standard amount to calculate tenant rent on the date that the family's regular examination of income would have been effective, in the absence of the waiver. All participants will receive the increased Payment Standard no later than the effective date of the family's first regular reexamination of income following the increased Payment Standard.

HOUSING CHOICE VOUCHER PROGRAM – UTILITY ALLOWANCE SCHEDULE REVIEW AND REVISION – CHANGES IN PAYMENT STANDARDS AND UTILITY ALLOWANCE

HCV Administrative Plan – Chapter 11, Section H

Temporary amendment will expire on December 31, 2020, or at a time determined by HUD through waiver extension.

The utility allowance schedule for the LHA is reviewed and revised annually. During this health emergency, the LHA may delay this revision. The utility allowance schedule will be revised at the soonest possible time before December 31, 2020.

LOW RENT PUBLIC HOUSING ADMINISTRATIVE PLAN AMENDMENTS

PUBLIC HOUSING PROGRAM – COMMUNITY SERVICE AND SELF-SUFFICIENCY REQUIREMENT

LRPH Administrative Plan - Community Service Policy – Appendix E

Temporary amendment will expire on March 31, 2021, or at a time determined by HUD through waiver extension.

Each adult resident living in public housing, except for those family members that are exempt, must perform 3 hours of community service or participate in an economic self-sufficiency program, or a combination of both. During this health emergency, the LHA will suspend this requirement until the family's next reexamination of income and family composition. After the annual reexamination of the family, the Community Service and Self-Sufficiency requirement will become effective again for non-exempt family members.

PUBLIC HOUSING PROGRAM – OVER-INCOME FAMILIES

LRPH Administrative Plan – Over-Income Policy – Appendix P

Temporary amendment will expire on December 31, 2020, or at a time determined by HUD through waiver extension.

Under the current policy, families whose income exceeds the program maximum income level for two consecutive years are required to be terminated or be charged an alternative rent amount. During this health emergency, the LHA will permit over income families to remain in their units and pay the same rental amount until the LHA conducts the next annual recertification of family income.

FAMILY SELF SUFFICIENCY PROGRAM ACTION PLAN AMENDMENT

FAMILY SELF SUFFICIENCY PROGRAM – CONTRACT EXTENSION

Temporary amendment will expire on December 31, 2020, or at a time determined by HUD through waiver extension.

The Family Self Sufficiency program allows for the extension of an FSS contract of participation for a two year period for good cause. During this health emergency, program participants may extend their contracts using COVID-19 as good cause for a period not to extend beyond December 31, 2020.

ATTACHMENT D

Statement of Financial Resources

[24 CFR Part 903.7 9 (b)] *Updated for new 2CFR200*

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan year. Note: the table assumes that Federal public housing or tenant based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2020 grants)		
a) Public Housing Operating Fund	7,346,761	
A. Public Housing Capital Fund	4,793,739	
B. HOPE VI Revitalization	0	
C. HOPE VI Demolition	0	
D. Annual Contributions for Section 8 Tenant-Based Assistance	14,123,804	
E. Public Housing Drug Elimination Program (including any Technical Assistance funds)	0	
a) Resident Opportunity and Self-Sufficiency Grants	141,032	
b) Community Development Block Grant	0	
c) HOME	0	
Other Federal Grants (list below)	0	
2. Prior Year Federal Grants (unobligated funds only) (list below)		
Capital Fund Program	2,535,538	Public Housing Capital Improvements
3. Public Housing Dwelling Rental Income		
Federal Low Rent Public Housing	8,120,000	Public Housing Operations

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
4. Other income (list below)		
Investment Income(Federal)	134,000	Public Housing Operations
Other Income other than rent and interest.	1,347,641	Public Housing Operations
5. Non-federal sources (list below)		
State Low Rent Public Housing including MRVP vouchers	3,494,047	Public Housing Operations
Unrestricted Investment Income (State)	17,000	Public Housing Operations
Total Resources	\$42,053,562	

ATTACHMENT E: 2020-2024 LHA FIVE YEAR GOALS

PROGRESS MADE IN YEAR 1 (FY 2020) OF THE FIVE YEAR PLAN

Goals for 2020-2024	Progress made or Estimated to be Completed by September 30, 2020
Physical Facilities:	
<p>Creation of a mixed-use development on the site of the Mercier Center or other location within the City through the non-profit Revitalization Effort Toward New Urbanism (RENU). The LHA received approval from the Special Applications Center (SAC) of HUD in August 2018, for the disposition of 87 scattered site units under AMP2. The LHA will dispose of these units in accordance with the directive issued by the SAC.</p>	<p>The Lowell Housing Authority conducted a Request for Proposals (RFP) process for the disposition of 20 scattered site buildings. To date, three (3) buildings have been sold (16 units), the LHA has executed Purchase and Sale Agreements on fourteen (14) properties (64 units) and RFP respondents are negotiating Purchase and Sale Agreements for three (3) properties (7 units).</p>
<p>Relocation of residents occupying scattered site units who choose to move to other public housing or lease with a private landlord utilizing a Housing Choice Voucher.</p>	<p>To date, twelve (12) families have been issued a Housing Choice Voucher. Eleven (11) families have used the voucher to lease in place and one (1) family has relocated to an apartment in Lowell.</p> <p>Moving forward, thirty-eight (38) families intend to relocate with a Housing Choice Voucher, three (3) families intend to relocate to other Public Housing units and fourteen (14) families intend to remain in place with a Housing Choice Voucher.</p>
<p>Complete housing development at the Rivers Edge On the Concord site.</p>	<p>In January 2020, the Residents First Development Corporation (RFDC) issued a request for proposals for completion of the final phase of the project. Revitalization Effort Toward New Urbanism (RENU), an LHA affiliate non-profit, submitted a proposal and was notified on February 27, 2020 that RENU's proposal was selected by the RFDC for award. RENU is in the process of obtaining land ownership, rezoning the site and is working with O'Brien Construction to design the final phase of the development. The final plan for both construction type and affordability will require both City and MA Department of Housing and Community Development (DHCD) approval.</p>
<p>As opportunities arise, Federalize State Public Housing developments based on the number of available units under the Faircloth Amendment. The LHA has identified 11 units of family housing that are pending approval by DHCD and HUD.</p>	<p>The Lowell Housing Authority has received a Modernization to Independence Grant in the amount of \$162,916 to facilitate to federalization of ten (10) units at 40 – 58 Dublin Street. The design phase for modernization of kitchen and baths will begin in the Fall of 2020.</p>

Goals for 2020-2024	Progress made or Estimated to be Completed by September 30, 2020
Establish a comprehensive capital plan to address aging roofs, elevators and other building systems.	Contained in the 2020 – 2024 Capital Fund Plan is funding allocated for the upgrade/replacement of elevators at six (6) locations at South Common Village, roof replacements at the Highland Parkway Triplex and Centralville Gardens and generator replacements at Belvidere Heights, City View Towers, Francis Gatehouse and Centralville Gardens.
Revitalization of the Hadley House, a historic home in which the LHA intends to establish a supportive housing program for Veterans or other special needs groups. This is contingent upon the award of site control by the City of Lowell.	The Residents First Development Corporation (RFDC) has acquired the Hadley house structure and is working with the State to gain site control of the land on which the building is situated. The Authority is currently obtaining appraisals on LHA owned land at Faulkner Street, Stackpole Street and Broadway Street to be offered to the State as a land swap for the property on Broadway Street.
Explore the technology behind and the benefits of the creation of Smart Buildings for better efficiencies and cost savings.	The Authority will be bidding the supply and installation of digital messaging boards in our elderly and young disabled developments. This technology will allow the LHA to stream important information and messages to our residents. In the next year, our facilities team will be investigating other technological improvements in our buildings that will include electronic leak detection, pressure and heat loss detection and electrical outages. These electronic detectors will provide immediate alerts through a smart device to allow for immediate LHA response and repair.
Determine if implementation of the Rental Assistance Demonstration (RAD) Program or other repositioning opportunities are feasible for the preservation of LHA public housing properties. The LHA will look at the Moving to Work Program and explore the benefits to the LHA.	The LHA was to attend a RAD informational and feasibility session with the Department of Housing and Urban Development (HUD) in March 2020. This session was postponed due to COVID. A virtual meeting with HUD's Office of Recapitalization is scheduled for August 4, 2020. The LHA will review the pros and cons of a conversion with program experts. LHA will provide information on our available units, unit condition, certain resident data, financial health and our experience administering HUD Vouchers to HUD to assist in our conversation.
Research energy programs for the replacement of building systems and structural fixtures for increased energy efficiencies.	The LHA has received approval from the US Department of Housing and Urban Development (HUD) to enter into an extension to our energy performance contract (EPC) with Ameresco, Inc. for a period of eight years. The extension allows the Authority to

Goals for 2020-2024	Progress made or Estimated to be Completed by September 30, 2020
	continue to receive the HUD incentives and savings from our original EPC for an additional eight years and offers a significant opportunity to LHA to implement energy efficient capital improvements such as: common area lighting upgrades, premium efficiency boilers and toilets, new hot water heater tanks, roof replacement and insulation, and solar water heating.
Management Operations	
Revise the Mission Statement to reflect the goals and priorities of the agency.	A new slogan for the LHA has been developed and the revised Mission Statement will follow.
Incorporate data driven decision making in all areas of the Authority's operation.	The LHA has recently hired a Data Analyst to review information and provide trend reports to the Executive and Management Teams. The Analyst will work with all staff to develop reports related to maintenance operations and property management.
Increase the use of technology among all staff members for secure information storage and streamlining of administrative processes	The LHA has entered into a contract with a 3 rd party IT Management Team to ensure secure network operations and safe cloud storage of information. The Authority will soon provide mobile tablets to maintenance and management staff that offer remote capabilities such as opening and closing work orders and sharing inspection results.
Update maintenance procedures for a more efficient operation and explore possible outsourcing of work through privatization.	After conducting an operational analysis in 2019, the LHA established a dedicated Unit Turnover Team which is comprised of 4 maintenance staff members. This has resulted in a 150% reduction in unit turnover time and in some instances, the ability to offer units to applicants three weeks earlier than before. This was accomplished through the dedication of team members and an improved inventory management system to ensure that staff members no longer leave the worksite for tools or parts to complete their assignment. A team-oriented approach is also being considered for landscaping and regular maintenance work.
Restructure the Organizational Chart and update job descriptions and the Personnel policy to reflect the Authority's needs.	The Organizational Chart for the Agency has been updated and shared with the Board of Commissioners. Job descriptions were updated to remove language and job functions that were obsolete. New job duties were included to meet the current operational needs of the agency. The Personnel Policy was updated and will be sent to the

Goals for 2020-2024	Progress made or Estimated to be Completed by September 30, 2020
	Personnel Sub-committee for review.
Continue the rebranding efforts of the agency. This will include increasing staff participation on local non-profit boards and expanding social media efforts to reach new stakeholders, residents and the general public.	The LHA currently has 5 staff members who are participating on local non-profit boards and commissions. Please see Attachment E-1
Expand grant writing efforts for the sustainability of the agency.	<p>It was a very successful year for the LHA in obtaining grant funding for Federal and State Programs. From 2019-2020, the LHA was awarded over 5.3 million in grant funds. Some highlights are shown as follows:</p> <p>Jobs Plus Grant – 2.3 million to provide nearly 200 families at the North Common Village with employment counseling, training and employment referrals. Services will be offered at the Mercier Center which is situated in the heart of the North Common Village.</p> <p>Resident Opportunities and Self-Sufficiency Grant: \$239,250 to sustain critical resident service program for our elderly and disabled population at 4 developments.</p> <p>For a list of all grants, please see Attachment E-2</p>
<p>Improve job performance at all levels and develop procedures for better performance output, with an emphasis on staff accountability. Increase resident accountability through increased communication and better lease</p> <p>The LHA will pursue future allocations of Housing Choice Vouchers, targeted toward special populations (Mainstream, VASH, FUP) to address the issue of homelessness in Lowell.</p>	<p>Over the last year, LHA staff at all levels participated in trainings on-line, at the Mercier Center and at other venues across the State. Maintenance and Management staff participated in REAC Inspection Training, Administrative Staff participated in Procurement Training and the Resident Coordinator attended a Senior Needs Assessment Training as well as a Fair Housing Training. For a list of all trainings attended, please see Attachment E-3</p> <p>In 2019 the LHA administered 103 Mainstream Vouchers and over the last year that number has increased by 36 with awards of 21 Vouchers through a competitive process and 15 additional Voucher under the CARES Act. Five VASH Vouchers were leased in the Lowell area over the last year.</p>

Goals for 2020-2024	Progress made or Estimated to be Completed by September 30, 2020
Continue to recruit and hire qualified minority applicants to expand diversity within the agency.	The LHA continues to place a high value on the recruitment and hiring of qualified minority candidates. In 2018, the Authority adopted an "Acre Hiring Preference" to hire residents from the high poverty neighborhood with a concentration of minority citizens. Since adoption of the policy, the Authority has filled ten positions out of twenty-one with qualified minority applicants. The LHA has achieved a 48% minority hiring rate. If including the number of female hires, this rate would increase to 67%. Of the twenty-one positions filled since 2018, thirteen of these were for professional administration positions requiring a degree. Eight of these positions were filled by minority candidates.
Expand and monitor staff development to increase productivity and ensure compliance with program regulations.	The LHA provides training and guidance to all staff to ensure compliance with federal and state regulations. Training is provided through outside vendors on specific program requirements related to Property Management, REAC Inspections, the Housing Choice Voucher Program and OSHA standards of compliance.
Client Services	
Create a set-aside of Housing Choice Vouchers for Public Housing residents graduating out of the Family Self Sufficiency Program and ready for homeownership	The LHA will establish a set-aside of 3-5 Housing Choice Vouchers for Public Housing Family Self-Sufficiency Program participants who have graduated from the program and have qualified for home ownership. This will ensure the financial stability needed by families transitioning to home ownership. The Authority is in the process of establishing an addendum to the Housing Choice Voucher Program Administrative Plan for this set-aside of vouchers.
Establish definitive protocols for communicating information to applicants/residents in order to provide better customer service.	<p>Increased communication with residents has been a goal of the Administration. Digital signage is one important tool to bring information to residents within our developments. The LHA has mapped out locations for digital signage and a formal bld packet is being developed to initiate this project.</p> <p>The LHA website is continuously updated to bring the most up-to-date information to applicants and</p>

Goals for 2020-2024	Progress made or Estimated to be Completed by September 30, 2020
	residents.
Collaborate with area non-profits in the development of programs and activities for resident youth advancement, and the expansion of the Family Self Sufficiency Program.	The LHA currently provides space at the Mercier Center to the Lowell School Department, to conduct individual student assessments. In addition, space is provided to conduct toddler play groups. The School Department also provides meals and snacks for the Learning Zone, an after-school homework assistance program offered at the Mercier Center and the Community Room at Highland Parkway.

ATTACHMENT E-1

Lowell Housing Authority Staff Participation on

Local Non-profit Boards and Commissions

July 2020

Tha Chhan	Cambodian Mutual Assistance Association
Michelle Dinan	Manolis Family Foundation, Inc.
Tracie Morgan	Open Pantry of Greater Lowell
Eunice Zeigler	Lowell Hunger & Homeless Commission
Jonathan Goldfield	American Red Cross
Dennis Mercier	Lowell Cemetery Commission
	Megan House Foundation, Inc.
	Mayor's Opioid Task Force
	Katelyn Kazanjian Foundation
Gary Wallace	Project LEARN, Inc.

ATTACHMENT E-2

2019 Lowell LHA Grant History

#	Grant Name/ Program	Grant Location (State Public Housing, Federal Public Housing, or both)	Amount Secured	Partnership Grant	Implementation	Summary
1	Greater Lowell Health Alliance	Federal Public Housing	\$ 1,500.00		Slated for launch in Spring 2020	The LHA was awarded a \$1,500 grant from the Greater Lowell Health Alliance for the LHA Farm to Table Program. This 5-week gardener training program will help to build confidence in the kitchen, teaching skills necessary for cooking fresh produce, food cultivation while connecting participants to the community. The youth and their families begin to participate in the LHA community garden they will be motivated by the value it will bring to their families.
2	Enterprise Bank Digital Inclusion Grant	Federal Public Housing	\$ 4,000.00		In progress	The LHA was awarded a \$4,000 grant from the Enterprise Bank to purchase 20 tablets for participants but will help to provide a resource that will aid in the educational pursuits. Participants will also be introduced to resources they can access 24/7 online sites such as Khan Academy Throughout the year, they will have the support of Learning Zone Staff to usher them towards their educational pursuits. Ultimately, LHA's Digital Inclusion initiative will empower our youth to have a stronger command of technology and use of the internet to that can help to improve their quality of life.
3	MOD Phase	State Public Housing	\$ 1,425,000.00		The A/E proposal is currently with the Designer Selection Board and the Resident Services program has begun in partnership with the Senior Center.	The LHA was awarded a \$1,425,000 grant from the Department of Community Development to conduct much needed capital at 572 - 610 Lakeview Ave, a 20 unit row house cluster. For capital improvements that would enhance the quality of life for its residents. The capital improvements include the following: repair building envelope, replacing entry doors/front and back, repair concrete stairs and railings; a complete kitchen and bathroom renovation electrical redistribution, Wi-Fi enabling, repaving walkways and the parking lot, (2) concrete pads and sidewalks, adding exterior lighting, clean out installations, and installing an activities/public notices board. In addition, to the physical improvements the LHA proposed a resident services and social engagement plan to cultivate a vibrant community. The plan will give residents access to onsite/ offsite activities supported by our partners Senior Center, Veterans Services, Lowell General Hospital, Mill City Grows, Elder Services of the Merrimack Valley, and Northeast Independent Living.
4	Emergency Safety and Security Grant	Federal Public Housing	\$ 116,816.00		Completed	The LHA was awarded a \$116,816 Emergency Safety and Security Grant to address crime prevention and camera surveillance at the North Common Village.
5	DHCD Sustainability Funds	State Public Housing	\$ 23,700.00		Spring 2020	The LHA was awarded \$23,700 in sustainability funding to assist with completing roof replacement project, Bathroom ventilation and install exhaust fans at 572- 610 Lakeview Ave.
6	Modernization to Independence	State Public Housing	\$ 162,916.00		In the Design Phase for a Fall 2020 launch	The LHA was awarded \$162, 916 to facilitate the federalization of the Dublin Street property.
7	ESSG Carbon Monoxide Grant	Federal Public Housing	\$ 68,529.00		Fall 2020	The LHA was awarded a \$68,529 grant from the Housing and Urban Development (HUD) to install 130 hardwired CO/smokes throughout Francis Gatchouse.
8	Ross Grant	Federal Public Housing	\$ 239,250.00		ongoing	The LHA was awarded a \$239,250 grant from the Housing and Urban Development (HUD) to sustain a robust resident services program for our elderly disabled community.

2019 Lowell HA Grant History					
#	Grant Name/ Program	Grant Program Location (State, Public Housing, Federal Public Housing or both)	Amount Secured	Partnership Grant	Implementation
9	Jobs Plus Grant	Federal Public Housing	\$ 2,300,000.00		Planning Phase
10	Lead and Healthy Homes Technical Studies Program with UML	Federal Public Housing		\$ 999,999.00	Planning Phase
11	Youth Build	Federal Public Housing			
12	AARP Community Challenge Grant	Both			
13	TD Bank Greater Lowell	Federal Public Housing			
14	Community Foundation LeClair Lider Service Grant	Federal Public Housing			
	Total Secured		\$ 4,341,711.00	\$ 999,999.00	
	Total Secured including the partnership		\$ 5,341,710.00		
Summary					
The LHA was awarded a \$2,300,000 grant from the Housing and Urban Development (HUD) to expand economic empowerment and employment opportunities for our residents at the North Common Village.					
A team of UML researchers will work with LHA's elderly population (55+) residing at Cityview Towers, Belvidere Heights, Francis Gatehouse, and Centralville Gardens. Through the study residents will be provided with air purifiers with HEPA filters for their kitchen and bedroom to reduce air pollutants.					
The LHA applied for a \$2,300,000 grant from the Housing and Urban Development (HUD) to expand economic empowerment and employment opportunities for our youth at the North Common Village					
The LHA applied for a \$6,815.00 grant from the AARP to support the Healthy Living Seniors Program and 3 month long nutrition series led by UML graduate students in the Nutrition program. The program was still launched in the Fall of 2019 and all materials for the nutrition workshops were provided by the University.					
The LHA applied for a \$125,000 grant from TD Bank to repair and replace the windows at 50 Stackpole Street.					
The LHA applied for a \$5,500 grant from the GLCF to cover a fraction of the resident service coordinator salary.					

2020 Lowell HA Grant History

#	Grant Name/ Program	Grant Program Location (State Public Housing, Federal Public Housing or both)	Amount Secured	Partnership Grant	Implementation	Summary
1	DHCD Resident Service Coordinator Grant	State Public Housing	\$ 40,000.00		In progress	The LHA was awarded a \$30,000 grant from DHCD to establish a Resident Service Coordinator position to serve the needs of State aided housing authority residents.
2	DHCD Healthy Initiatives Grant	State Public Housing	\$ 17,368.00		In progress	The LHA was awarded a \$17,368 grant from DHCD to for life safety upgrades to 58 D Street.
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
	Total Secured		\$ 57,368.00			
	Total Secured including the partnership		\$ 57,368.00			

ATTACHMENT E-3



Lowell Housing Authority Employee Training Fiscal Year 19-20

Training Information

Employee Name	Date of Training	Name of Training	Training Group	Training Category	Location of Training	Certificate Received	# of Hours	Cost \$	Comments
Sherry Gblin	3/11/2019	Licensing Session on Paid Family Medical Leave	Greater Lowell Chamber of Commerce	Payroll & HR	On-Line	No	2	Free	
Sherry Gblin	2/19/2019	Essentials of HR Law	Fred Pryor Seminars	Payroll & HR	Holiday Inn Tewksbury, MA	Yes	7.5	\$140	
Sherry Gblin	10/4/2018	Procurement & Contract Management	N/A-ED	Professional Development	On-Line	Yes	3	\$295	
Sherry Gblin	3/12/2019	Final 2019 HUD Budget & Implications Confirmation	Center on Budget and Policy Priorities	Finance	On-Line	No	1	Free	
Sherry Gblin	5/9/2019	Devis Beacon Workshop	HUD	Finance	Waltham Public Library	No	3	Free	
Erica Bradford	3/12/2019	Exploring Evidence-Based Program to Address Depression in Community Based Settings	Elder Services	Resident Services	On-Line	N/A	1.5	Free	
Erica Bradford	3/14/2019	Documenting Resident Violations	NEA/HMA	Resident Services	On-Line	N/A	1	Free	
Erica Bradford	2/21/2019	Resident Services Whats New in 2019	Mass Association of Resident Service Coordinators, Inc.	Resident Services	Lynn Housing Authority	No	2	Free	
Andrea Hall	2/21/2019	Resident Services Whats New in 2019	Mass Association of Resident Service Coordinators, Inc.	Resident Services	Lynn Housing Authority	No	2	Free	
Esther Zeigler	3/13 & 3/14	Essentials for Healthy Homes Practitioners	Unnass Lowell	Resident Services	Unnass Lowell	Yes	14	\$230	
Adam Garvey	3/14/2019	Documenting Resident Violations	NEA/HMA	Development	On-Line	No	4	\$139	
Dennis Mordor	3/14/2019	Documenting Resident Violations	NEA/HMA	Development	On-Line	No	4		
Amy Dalton	3/14/2019	Documenting Resident Violations	NEA/HMA	Development	On-Line	No	4		
Denise Ryan	3/14/2019	Documenting Resident Violations	NEA/HMA	Development	On-Line	No	4		
Sandra Bertios	3/14/2019	Documenting Resident Violations	NEA/HMA	Development	On-Line	No	4		
Andrea Hall	3/14/2019	Documenting Resident Violations	NEA/HMA	Development	On-Line	No	4		
Erica Bradford	3/14/2019	Documenting Resident Violations	NEA/HMA	Development	On-Line	No	4		
Michelle Dineen	3/14/2019	Fair Housing & Reasonable Accommodation Certification Enrollment	HTV/N/Nan McCoy	Resident Services	On-Line	No	4		
Michelle Dineen	11/7-11/9/18	Family Self Sufficiency Certification with PIC Consulting Company	PIC Consulting Company	Resident Services	On-Line	N/A	20	\$699	
Michelle Dineen	3/19/2019	How to Prevent Fraud	HTV/N/Nan McCoy	Resident Services	Warwick, RI	Yes	2	\$875	
Leo Mascon	11/28/2018	REAC Training	US Housing Consultants	Maintenance	On-Line	Yes	2	Free	
Bob Lhusier	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Mender Center	No	6	\$177	
Ken Fleming	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Mender Center	No	6	\$177	
John Greenwood	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Mender Center	No	6	\$177	
Paul Stahery	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Mender Center	No	6	\$177	
Brian Dean	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Mender Center	No	6	\$177	
William Cassella	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Mender Center	No	6	\$177	
Dan McCalloudy	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Mender Center	No	6	\$177	
Benny Murphy	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Mender Center	No	6	\$177	
Denise Ryan	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Mender Center	No	6	\$177	
Amy Dalton	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Mender Center	No	6	\$177	
Sandra Bertios	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Mender Center	No	6	\$177	
Michael Milano	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Mender Center	No	6	\$177	
Brian Moriarty	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Mender Center	No	6	\$177	

Juan Garcia	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Merced Center	No	6	\$177
Sam Talbot	11/28/2018	REAC Training	US Housing Consultants	Maintenance	Merced Center	No	6	\$177
Adam Garvey	3/19/2019	Fair Housing & Half Day Reasonable Accommodations	NEA-HMA	Resident Services	39 First Street, Worcester MA	NO	4	\$269
Dennis Mercler	3/19/2019	Fair Housing & Half Day Reasonable Accommodations	NEA-HMA	Resident Services	39 First Street, Worcester MA	No	4	\$269
Andrea Hall	3/30-5/3/19	21st Annual NERSC, Inc. Conference	NERSC	Resident Services	Falmouth, MA	Yes	13	\$460
Sherry Gblin	3/26/2019	MTW Webinar - Cohort 2		Finance	In-House	No	1	Free
Rachel Spero	3/25/2019	MTW Webinar - Cohort 2		Finance	In-House	No	1	Free
Dennis Mercler	4/4/2019	New Realities to HUD REAC Compliance Webinar	US Housing Consultants	Development	In-House Webinar	No		\$99
Erica Bradford	3/21/2019	Bad Bug Awareness	HTW/Nhan Mobay	Resident Services	In-House Webinar	Yes	1	Free
Adam Garvey	4/4/2019	Evictions of Public Housing Residents	HTW	Inspections	In-House Webinar	Yes	1.5	Free
Adam Garvey	4/4/2019	New Realities to HUD REAC Compliance Webinar	US Housing Consultants	Inspections	In-House Webinar	No	N/C	N/C
Serita Berrios	4/4/2019	New Realities to HUD REAC Compliance Webinar	US Housing Consultants	Inspections	In-House Webinar	No	1.5	N/C
Denise Ryan	4/4/2019	New Realities to HUD REAC Compliance Webinar	US Housing Consultants	Inspections	In-House Webinar	No	1.5	N/C
Sam Talbot	4/4/2019	New Realities to HUD REAC Compliance Webinar	US Housing Consultants	Inspections	In-House Webinar	No	1.5	N/C
Adam Garvey	7/24/2019	Are You Ready for RAD	NEA-HMA	Finance	In-House Webinar		1.5	\$129
Sherry Gblin	7/24/2019	Are You Ready for RAD	NEA-HMA	Finance	In-House Webinar		1.5	N/C
Rachel Spero	7/24/2019	Are You Ready for RAD	NEA-HMA	Finance	In-House Webinar		1.5	N/C
Andrea Hall	4/9/2019	Performing Senior Needs Assessments	HTW	Resident Services	In-House Webinar	Yes	1	Free
Kevin Forsley	5/16/2019	Managing a Wait List	NEA-HMA	Development	In-House Webinar		1.5	\$129
Rosa Gil	5/16/2019	Managing a Wait List	NEA-HMA	Development	In-House Webinar		1.5	Free
Brenda O'Connell	4/10/2019	Understanding the New HUD Section 3 Rule	Motivation Inc.	Finance	In-House Webinar	No	2	Free
Sherry Gblin	4/10/2019	Understanding the New HUD Section 3 Rule	Motivation Inc.	Finance	In-House Webinar	No	2	Free
Amelia Nichols	4/10/2019	Understanding the New HUD Section 3 Rule	Motivation Inc.	Finance	In-House Webinar	No	2	Free
Emilia Zeigler		Grant Writing Made Easy	Write Good Company	Development	In-House Webinar			\$97
Rachel Spero	4/24/2019	How to Set Up the FDS Report in Eltra	Emphasys	Finance	In-House Webinar	No	2	Free
Sherry Gblin	4/24/2019	How to Set Up the FDS Report in Eltra	Emphasys	Finance	In-House Webinar	No	2	Free
Rachel Spero	4/25/2019	Repayment Agreements	NEA-HMA	Finance	In-House Webinar	No	1.5	\$129
Sherry Gblin	4/25/2019	Repayment Agreements	NEA-HMA	Finance	In-House Webinar	No	1.5	N/C
Dennis Mercler	4/25/2019	Repayment Agreements	NEA-HMA	Finance	In-House Webinar	No	1.5	N/C
Denise Ryan	4/25/2019	Repayment Agreements	NEA-HMA	Finance	In-House Webinar	No	1.5	N/C
Serita Berrios	4/25/2019	Repayment Agreements	NEA-HMA	Finance	In-House Webinar	No	1.5	N/C
Amy Dalton	4/25/2019	Repayment Agreements	NEA-HMA	Finance	In-House Webinar	No	1.5	N/C
Allen Puntel	4/25/2019	Repayment Agreements	NEA-HMA	Finance	In-House Webinar	No	1.5	N/C
Joshua Alvarado	4/29/2019	Crime Prevention in Housing	HTW	Resident Services	In-House Webinar	No	1.5	N/C
Joshua Alvarado	4/29/2019	Active Shooter	HTW	Resident Services	In-House Webinar	Yes	1	N/C
Joshua Alvarado	4/29/2019	Creating Sustainable Communities	HTW	Resident Services	In-House Webinar	Yes	0.5	N/C
Laura Weeds	5/9/2019	David Bacon Workshop	HUD	Finance	Waltham Public Library	Yes	1	N/C
Jonathan Goldfield	5/9/2019	David Bacon Workshop	HUD	Finance	Waltham Public Library	No	3	Free
Amelia Nichols	5/9/2019	David Bacon Workshop	HUD	Finance	Waltham Public Library	No	3	Free
Sherry Gblin	6/6-6/7/19	Rental Assistance Demonstration Basics	NA-HRO	Finance	Deerham Housing Authority	No	3	Free
Rachel Spero	6/6-6/7/19	Rental Assistance Demonstration Basics	NA-HRO	Finance	Deerham Housing Authority			\$399

Andrea Hall	5/17/2019	Resilience Factors for People Who Use Drugs	Quantum Units	Resident Services	Webinar	Yes	1	Free
Andrea Hall	5/17/2019	Understanding Co-Occurring Mental Illness & Substance Use Disorders	Quantum Units	Resident Services	Webinar	Yes	1	Free
Andrea Hall	5/17/2019	Increasing the Effectiveness of Suicide Prevention Strategies	Quantum Units	Resident Services	Webinar	Yes	1	Free
Andrea Hall	3/6/2019	Hospital to Home	American Society on Aging	Resident Services	Webinar	Yes	1	Free
Andrea Hall	4/9/2017	Performing Senior Needs Assessments	HTYN	Resident Services	Webinar	Yes	1	Free
Andrea Hall	4/9/2019	Bed Bug Awareness	HTYN	Resident Services	Webinar	Yes	1	Free
Adam Garvey	6/26/2019	Screening Your Residents	NEAHMA	Resident Services	Webinar	Yes	1	Free
Joshua Alapuna	4/29/2019	Cyber Risk	HTYN	Resident Services	Webinar	Yes	1.5	Free
Joshua Alapuna	5/7/2019	Healthy Homes In Housing	HTYN	Resident Services	Webinar	Yes	1	Free
Joshua Alapuna	5/1/2019	Evictions of Public Housing Residents	HTYN	Resident Services	Webinar	Yes	1	Free
Joshua Alapuna	5/7/2019	Advocacy 101: Adding Your Voice to Conversation	HTYN	Resident Services	Webinar	Yes	1	Free
Barbara O'Connor	6/26/2019	Marijuana and its Impact on the Workplace	AUM	Resident Services	Webinar	Yes	1	Free
Michelle Dineen	6/26/2019	Marijuana and its Impact on the Workplace	AUM	Payroll & HR	Webinar	Yes		\$50
Andrew Rocha	8/12-8/16	PHM Seminar & Exam	AUM	Payroll & HR	Webinar			N/C
Joshua Alapuna	8/12-8/16	PHM Seminar & Exam	Narc/Nahro	Development	Worcester, MA	Yes	5 Days	\$699
Jonathan Goddard	7/18/2018	Preparing for New REAC 7 NSPIRE Rules	Narc/Nahro	Development	Worcester, MA	Yes	5 Days	\$699
Laura Weiss	7/18/2019	Preparing for New REAC 7 NSPIRE Rules	Eventbrite	Development	Boston		6	\$315
Joshua Alapuna	7/18/2019	Preparing for New REAC 7 NSPIRE Rules	Eventbrite	Development	Boston		6	\$315
Joshua Kazanjian	7/18/2019	Preparing for New REAC 7 NSPIRE Rules	Eventbrite	Development	Boston		6	\$315
Thomas Lafferty	7/18/2019	Preparing for New REAC 7 NSPIRE Rules	Eventbrite	Development	Boston		6	\$315
Erica Bradford	8/12-8/16	PHM Seminar & Exam	Narc/Nahro	Development	Worcester, MA	Yes	5 Days	\$699
Kevin Forsley	8/5/19 & 8/5/19 & 8/9/19	What's New with CHAMP	CyberSense Training	Development	Webinar		1.5	N/C
Rosa Gill	11/19/2019	Preparing for New REAC 7 NSPIRE Rules	CyberSense Training	Development	Webinar		1.5	N/C
Sain Talbot	8/22/2019	Documenting Resident Violations	Eventbrite	Development	Portsmouth, NH		6	\$350
Denise Ryan	8/22/2019	Documenting Resident Violations	NEAHMA	Resident Services	Webinar		1	Free
Erica Bradford	8/22/2019	Documenting Resident Violations	NEAHMA	Resident Services	Webinar		1	Free
Mike Misdano	8/22/2019	Documenting Resident Violations	NEAHMA	Resident Services	Webinar		1	Free
Andrea Hall	8/28/2019	Certified Senior Advisor	Society of Certified Seniors	Resident Services	Webinar		1	Free
Andrea Hall	9/26/2019	Improving Goal Achievement Behavior in Adults with Limited Incomes	Quantum Unit Education	Resident Services	Books/Exam	Yes	160	\$315
Joshua Alapuna	9/26/2019	REAC Inspection: An Overview-Spot On	National Center for Housing Management	Inspections	Webinar	Yes	1	Free
Erica Bradford	9/26/2019	REAC Inspection: An Overview-Spot On	National Center for Housing Management	Inspections	Webinar	No	1	\$115
Sherry Giblin	9/16-9/18	MOPPO-Design & Construction Contracting	MOPPO	Development	Webinar	No	1	N/C
Barbara O'Connor	9/16-9/18	MOPPO-Design & Construction Contracting	MOPPO	Development	Umass Lowell	Yes	24	\$695
Erica Zeigler	9/16-9/18	MOPPO-Design & Construction Contracting	MOPPO	Development	Umass Lowell	Yes	24	\$695
Sherry Giblin	9/24-9/25	MOPPO Certification for MOPPO	MOPPO	Development	Umass Lowell	Yes	24	\$695
Erica Zeigler	11/18-11/20	Supplies & Services Contracting	MOPPO	Development	Umass Lowell	Yes	16	\$495
Michelle Dineen	9/3/2019	2018-2019 ConnecticutUSA	MOPPO	Development	Umass Lowell	Yes	16	\$595
Erica Zeigler	6/5/19-6/7/19	Public Contracting Overview	MOPPO	Development	Webinar	No		N/C
Adam Garvey	12/3/2019	Management and Occupancy Review		Development	Umass Lowell	Yes	16	\$695
Mark Breese	12/3/2019	Management and Occupancy Review		Development	Webinar	Yes	1	\$163
Andrea Hall	12/30/2019	Fair Housing Act, Section 504 & the ADA	New England Learning	Development	Webinar	Yes	1	N/C
				Resident Services	Webinar	Yes	2	N/C

Andrea Hall	12/30/2019 Disability Rights Laws Overview	New England Learning	Resident Services	Webinar	Yes	2	N/C
Clinton Wilson	11/19/2020 PHA Manager Certification	HTVN	Development	Webinar	Yes		
Joshua Alzpurua	1/10/2020 Cyber Awareness Challenge		Development	Webinar	Yes	1	N/C
Andrea Hall	12/30/2019 Fair Housing Act, Section 504 & the ADA	NE ADA Learning	Resident Services	Webinar	Yes	2	N/C
Andrea Hall	1/8/2020 Older Adults & Mental Health	Quantum Units Education	Resident Services	Webinar	Yes	5	N/C
Andrea Hall	1/8/2020 Ethics, Confidentiality & Boundary Issues	Quantum Units Education	Resident Services	Webinar	Yes	2	N/C
Andrea Hall	1/9/2020 Verbal De-Escalation of the Agitated Patient	Quantum Units Education	Resident Services	Webinar	Yes	1	N/C
Andrea Hall	1/9/2020 Prevention & Management of Disruptive Behavior	Quantum Units Education	Resident Services	Webinar	Yes	1	N/C
Sherry Glavin	2/4/2020-2/13/2020 Intro to Repositioning Public Housing	Enterprise Community Partners	Finance	Webinar	Yes	12	N/C
Sherry Glavin	1/30/2020 CY 2020 Operating Fund Bootcamp	BDO PHA Finance	Finance	Webinar	Yes	2	\$125
Rachel Spero	2/4/2020 Opportunity Zones 101 for Public Housing	National Development Council	Finance	Webinar	No	1	N/C
Rachel Spero	2/18 & 19 Regional Symposium Emphasys Software	Emphasys	Finance	Easton, MA		12	\$250
Alison Purcell	2/20/2020 Regional Symposium Emphasys Software	Emphasys	Finance	Boston, MA		6	\$125
Amy Dalton	3/3/2020 New HUD Guidance on Assistance Animals	National Center for Housing Management	Resident Services	Webinar	No	1	\$149
Clinton Wilson	3/3/2020 New HUD Guidance on Assistance Animals	National Center for Housing Management	Resident Services	Webinar	No	1	N/C
Dennis Merder	3/3/2020 New HUD Guidance on Assistance Animals	National Center for Housing Management	Resident Services	Webinar	No	1	N/C
Joshua Alzpurua	3/3/2020 New HUD Guidance on Assistance Animals	National Center for Housing Management	Resident Services	Webinar	No	1	N/C
Denise Ryan	3/3/2020 New HUD Guidance on Assistance Animals	National Center for Housing Management	Resident Services	Webinar	No	1	N/C
Erica Bradford	3/3/2020 New HUD Guidance on Assistance Animals	National Center for Housing Management	Resident Services	Webinar	No	1	N/C
Mark Briere	3/3/2020 New HUD Guidance on Assistance Animals	National Center for Housing Management	Resident Services	Webinar	No	1	N/C
Ashley Binet	3/3/2020 New HUD Guidance on Assistance Animals	National Center for Housing Management	Resident Services	Webinar	No	1	N/C
Kevin Forsley	4/2/2020 HUD Waiting List management	Compliance Prime	Resident Services	Webinar	No	1	\$149
Rosa Gill	4/2/2020 HUD Waiting List management	Compliance Prime	Resident Services	Webinar	No	1	N/C
Amy Dalton	4/3/2020 Reasonable Accommodations with New HUD Updates	Your Own 60	Resident Services	Webinar	No	1	\$199
Denise Ryan	4/3/2020 Reasonable Accommodations with New HUD Updates	Your Own 60	Resident Services	Webinar	No	1	N/C
Sasha Bernhis	4/3/2020 Reasonable Accommodations with New HUD Updates	Your Own 60	Resident Services	Webinar	No	1	N/C
Sherry Glavin	5/1/2020 HUD Cares Act Funding	HUD	Resident Services	Conference Call	No	1	N/C
Rachel Spero	5/1/2020 HUD Cares Act Funding	HUD	Resident Services	Conference Call	No	1	N/C
Janice Gomes	6/11/2020 HUDS Final Ruling on VAWA	EventsQED	Development	Webinar	No	1	\$199
Alison Purcell	6/11/2020 HUDS Final Ruling on VAWA	EventsQED	Development	Webinar	No	1	N/C
Rita Brousseau	2/19-2/20/20 MCPPO Recertification Class	MCPPO	Development	Unass Lowell	Yes	2 Days	\$635
Rita Brousseau	6/9/2020 MCPPO Cybersecurity 1010 Class	MCPPO	Development	Webinar	No	6	\$200
Rita Brousseau	6/18/2020 Combuys PPE Purchasing Resources	Combuys	Development	Webinar	No	1	N/C
Rita Brousseau	6/22/2020 MCPPO Real Estate Transactions	MCPPO	Development	Webinar	No	6	\$200
Rita Brousseau	6/24/2020 Combuys Bid Management Guidelines	Combuys	Development	Webinar	No	1	N/C
Mark Briere	7/7/2020 Introductory Procurement Training	City of Lowell	Development	9 Part Training with City	No	9	N/C
Kristen Conlon	7/7/2020 Introductory Procurement Training	City of Lowell	Development	9 Part Training with City	No	9	N/C
Rita Brousseau	7/7/2020 Introductory Procurement Training	City of Lowell	Development	9 Part Training with City	No	9	N/C

ATTACHMENT F

RESIDENT ADVISORY BOARD (RAB) MEETING

February 20, 2020

11:00 AM

Mercier Center, 21 Salem Street, Lowell, MA

AGENDA

- 1. Opening Remarks – Year 1 of the 5 Year Plan**
- 2. Ongoing Capital Projects**
- 3. Progress in Meeting Goals to Date**
- 4. Goals, Performance Measurement, Accountability**
- 5. Disposition of Scattered Site Units**
- 6. Resident Concerns/Discussion**

ATTACHMENT F

RESIDENT ADVISORY BOARD (RAB) MEETING MINUTES

February 20, 2020

11:00 AM

Mercier Center, 21 Salem Street, Lowell, MA

1. Opening Remarks - Year 1 of the 5 Year Plan

Mary Maciejewski opened the meeting at 11:00am and introduced staff present- Eunice Zeigler, Sarita Berrios, Laura Watts, Jonathan Goldfield, Tha Chhan. Commissioner Joanie Bernes was also present.

Salutations were presented from Adam Garvey Assistant Executive Director. His message highlighted two major focus areas

1. Customer service - LHA is looking to collect emails, phone numbers to keep residents updated
2. Safety Procedures- LHA is looking to improve safety procedures so residents feel safer and more comfortable in their apartments. Residents were asked what the LHA can do to enhance the living experience for everyone.

MaryAnn asked that the committee think about these focus areas.

2. Ongoing Capital Projects

Jonathan Goldfield explained the financial structure of the departments federally funded projects and state funded projects

- 40 Dublin Street is slated to transition to a federal development which includes a \$180k investment for a new roof, new kitchen and baths and comprehensive site work.
- North Common Village- work is underway to update sitework, improving drainage and runoff from the roof at the Mercier Center. The Museum at that location has been completed.
- Highland Parkway – Kitchen and bath improvement project is going to the Board in March for approval, a new HVAC system in the main building at 580 Chelmsford Street will soon be underway. Additionally, almost every building in the development is slated for a roof replacement.
- South Common Village- Completed a handicap unit conversion, and a roof replacement will occur. The department is currently working on site improvements – plantings, site improvements for better safety. The LHA received funding through Ameresco to complete boiler replacements. Elevator replacements/upgrades will begin.

• **Amp4**

- City View Towers- the balcony study was conducted. Over the next year the balcony repair project will be completed.
- Centralville Gardens- The LHA will replace the elevator. The project is going out to Bid next week
- Francis Gatehouse- Finalizing the kitchen and bathroom modernization. The last two apartments will be completed in March.

Agency wide

- Safety improvements – Ameresco is funding 28 lighting and energy efficiency improvement projects across the agency.

3. Progress in Meeting Goals to Date

MaryAnn proceeded to highlight some of the progress made on the 5 Year Plan goals

Goal:	Status:
Creation of a mixed-use development on the site of the Mercier Center or other location within the City through the non-profit Revitalization Effort Toward New Urbanism (RENU). The LHA received approval from the Special Applications Center (SAC) of HUD in August 2013 for the disposition of 37 scattered site units under AMP2. The LHA will dispose of these units in accordance with the directive issued by the SAC.	Currently in the planning stage and seeking funding for this project.
Relocation of residents occupying scattered site units who choose to move to other public housing or lease with a private landlord utilizing a Housing Choice Voucher.	Two properties at Oak Street and Roosevelt Place have been sold. Other properties have signed Purchase and Sale Agreements and will be sold. Residents may remain in their unit with a Voucher, relocate to other Public Housing Units or relocate to a unit in the private market with a Voucher.
As opportunities arise, Federalize State Public Housing developments based on the number of available units under the Faircloth Amendment. The LHA has identified 11 units of family housing that are pending approval by DHCD and HUD.	Dublin Street Federalization project has received DHCD approval. The process of federalization will give the units access to more funding for capital improvements.
Establish a comprehensive capital plan to address aging roofs, elevators and other building systems.	An assessment is in the works.
Revitalization of the Hadley House, a historic home in which the LHA intends to establish a supportive housing program for Veterans or other special needs groups. This is contingent upon the award of site control by the City of Lowell.	The LHA acquired the site and is working with the state to acquire the land rights to renovate the site for veterans housing.

Explore the technology behind and the benefits of the creation of Smart Buildings for better efficiencies and cost savings.	Reviewing the EPC Contract with Ameresco.
---	---

4. Goals, Performance Measurement, Accountability

The LHA had a retreat last year and established these focus areas that are further supported through the 5-year plan and drives all of the agency's focus

Vacancy Turnover- The process has been improved vacancy turn-around time with the establishment of a Vacancy Turn-around Team.

Restructure Organizational Structure- Goal of restructuring the organization of the agency has been completed

New Board memberships- Our employees are engaged in new board memberships. For example, Tha Chhan has joined the CMAA Board, Dennis Mercier has joined the Megan's House Board, and Tracie Morgan has joined the Open Pantry Board.

Continue to recruit minority candidates- The LHA has hired many minority candidates with bilingual capabilities

Expanding grant opportunities- The LHA was award Jobs Plus Grant Award in the amount of \$2.3 million and a Modphase Award (state) in the amount of \$1.2 million.

Expand access Housing vouchers- 28 additional Mainstream Vouchers.
Housing voucher set aside- 3-5 vouchers for Public Housing FSS graduates looking to buy a home.

5. Disposition of Scattered Site Units

Two properties have officially been sold - Oak Street and Roosevelt Place.

6. Resident Concerns/Discussion

Residents expressed excitement about the grant opportunities and capital improvements, especially the elevators.

ATTACHMENT G

FFY20-FFY24 Five Year and Annual PHA Plan Capital Projects

(7/17/2020 draft JCG)

1. The Mercier Center historic exhibit space and museum-quality display cases and lighting was completed and dedicated. This project honors and documents the Lowell Housing Authority benchmarks since its inception.
2. Mercier Center exterior site and roof upgrades are underway (July 2020). This project was divided into two components, (1) the copper roof and snow guard repairs and upgrades, and (2) the front and rear plazas, redirected and repaired handicap ramps, concrete stair repairs and water runoff control.
3. Site landscape and hardscape projects continue at North Common Village. The two O'Brien Terrace sitting areas are complete. These areas each include a concrete deck with vintage-design benches, surrounding brick masonry knee walls with built-in LED lighting, brick masonry piers and ornamental aluminum fencing.
4. 580 Chelmsford Street multi-purpose building HVAC system is complete (July 2020) with a split AC ground-mounted system (removing the original roof top units), two new high-efficiency furnaces and a 50-gallon domestic hot water tank. The cupola repairs were split off of this project, and work is being planned for execution by Force Account Labor (FAL).
5. AMP 2, 10-30 Avenue A (10 units), Kitchen and Bath Modernization (Phase 5) is awarded and scheduled to mobilize in late August 2020. Two temporary "hotel units" vacant apartments at AMP2 are being used to house residents while their apartments are modernized.
6. South Common Village MA 1-3, Phase 2 of 3, Electrical Redistribution that was started in 2013-2014 (Phase 1) to bring the infrastructure up to current code per the master plan done in 2013 will be launched. A designer will be selected in the fall of 2020.
7. AMP 1 and AMP 3 parking lots, walk ways and infrastructure upgrades to address REAC compliance, handicap accessibility and parking, landscape/hardscape, lighting and other safety & site upgrades are underway in the summer of 2020 with scheduled completion by October.
8. Replacement elevator systems are planned each year based on the recommendations of the 2019 feasibility study targeting the most critical elevators. The first elevator to be replaced is at 111 Hildreth Street, Centralville Gardens. A designer solicited and selected and general contract awarded. Replacement work is scheduled to commence in August 2020. Elevator replacement projects are planned each year through FFY24 at South Common Village: 43 Summer St., 50 Summer St., 65 Summer St., 198 South St., 145 Gorham St., 183 Gorham St., 227 Gorham St.,

130 and 174 South St.

9. Surveillance cameras and data infrastructure updates are installed at all locations.
10. An Energy Performance Contract (EPC) with Ameresco is awarded for the next phase of work (Phase 2), that will include boiler and water heater replacements and decentralization, roofing, passive solar panels/hot water), roof replacements, air-handling unit replacements, water efficient fixtures and interior/exterior LED lighting at multiple sites including South Common Village, Francis Gatehouse, Faulkner Street. Work is anticipated to begin in August 2020.
11. The City View Towers (MA 1-6) balconies were studied by a qualified design firm, which submitted repair recommendations. The LHA plans to divide the work into two phases in FFY20 and FFY24.
12. AMP 2 Storm door replacements for approximately six units for FFY20 with more in FFY21. We are limiting these door replacements to those units that already have kitchen and bath modernizations completed.
13. City View Towers (MA 1-6) requires another phase of work on the rear plaza that will include wall and column paint, upgraded pedestrian walks, lighting and planters. FFY20.
14. Belvidere Heights (MA 1-5), City View Towers (MA 1-6), Francis Gatehouse (MA 1-11) and Centralville Gardens (MA 1-19): Site upgrades, paving, walkways, parking lot paving and striping, lighting and other site improvements. FFY20.
15. North Common Village (MA 1-1) rowhouse window replacements and trim painting in several phases beginning with FFY19 funds. Continuing the plan to improve the historic neighborhood appeal at this 1937 development where we have painted all row house doors dark red with black trim and removed mail slots in favor of cluster mailboxes under lit kiosks. We are replacing windows with a black frame and painting the aluminum panning around them. Work will be performed in fall 2020 continue in spring 2021.
16. North Common Village (MA 1-1) utility pipe upgrades in development crawl spaces. Update water, sewer and gas lines as needed. with the potential for fiberoptic runs as well.
17. Development community rooms are receiving new paint and furniture upgrades. Note that this year marked the "COVID-19" pandemic, where action had to be taken starting in March 2019. Much work was performed to protect, reconfigure, clean, sanitize and supply offices and common areas through grant and operational funds.