

# SOUTH BEND HOUSING AUTHORITY BOARD OF COMMISSIONERS MEETING

## JUNE 2023

Transforming Communities



### **HASB MISSION**

IT IS THE MISSION OF THE HOUSING AUTHORITY OF SOUTH BEND (HASB) TO PROVIDE SAFE AND AFFORDABLE HOUSING ASSISTANCE TO INDIVIDUALS AND FAMILIES IN A MANNER THAT IS RESPECTFUL, PROFESSIONAL AND SERVICE- ORIENTED. THE HASB IS COMMITTED TO MAXIMIZE ITS EXISTING RESOURCES AND WORK IN PARTNERSHIP WITH THE COMMUNITY TO ASSIST RESIDENTS IN REACHING INDIVIDUAL AND FAMILY GOALS, INCLUDING THOSE OF SELF-SUFFICIENCY, THROUGH EDUCATION, INCREASING EMPLOYMENT AND HOMEOWNERSHIP OPPORTUNITIES.

# BOARD OF COMMISSIONERS MEETING

JUNE 2023

**The June Board of Commissioners meeting has been cancelled due to the travel for training purposes of the staff and Board members. The next meeting will be conducted July 25<sup>th</sup>, 2023.**

ROLL CALL

MEETING MINUTES

EXECUTIVE SESSION MEETING MINUTES

PUBLIC COMMENT

NEW BUSINESS

EXECUTIVE DIRECTORS REPORT:

- FAMILY SELF SUFFICIENCY
- ADMINISTRATION
- ASSET MANAGEMENT (Public Housing and Housing Choice Voucher)
- FINANCE
- DEVELOPMENT and PROCUREMENT

BOARD MEMBERS COMMENTS

BOARD CHAIR CLOSING REMARKS

MEETING ADJOURNED



**THE HOUSING AUTHORITY OF THE  
CITY OF SOUTH BEND, INDIANA**

***REGULAR BOARD MEETING MINUTES***

***501 Alonzo Watson Drive***

***South Bend In 46601***

***May 23<sup>rd</sup>, 2023 @ 9 a.m.***

**CALL TO ORDER:**

Commissioner Calvin called the meeting to order 9:00 a.m.

**ROLL CALL:**

Commissioner Virginia Calvin, Commissioner Stephen Luecke, Commissioner Roland Chamblee; Commissioner M Daniel; Commissioner Judd McNally

**HASB STAFF:**

Dr. Catherine Lamberg, Ms. Lori Wallace, Director of HCV; Mrs. Deborah Mobley, Director of Public Housing; Mr. Andy Delaney, CFO; Ms. Pamela Rogers, Administrative Assistant to Executive Director/Board Secretary

**OTHERS:**

Attorney J. Harris Jr

**OLD BUSINESS:**

Commissioner Luecke moved to approval of Minutes from the April 25, 2023, board of commission meetings. Commissioner McNally second the motion. The vote was as follows.

|                              |            |
|------------------------------|------------|
| <b>Commissioner Luecke</b>   | <b>AYE</b> |
| <b>Commissioner Chamblee</b> | <b>AYE</b> |
| <b>Commissioner Daniel</b>   | <b>AYE</b> |
| <b>Commissioner McNally</b>  | <b>AYE</b> |
| <b>Commissioner Calvin</b>   | <b>AYE</b> |

Commissioner Calvin noted and certified that the commissioners also met in executive session on May 17, 2023, and that nothing was discussed during that meeting other than the topic including on the posted and advertised noticed of the meeting that is required under Indiana code 5.14.1.5-6.1 all call for the approval of the executive session minutes.

Commissioner Luecke moved for approval and Commissioner McNally seconded the motion. The vote was as follows.

|                            |            |
|----------------------------|------------|
| <b>Commissioner Luecke</b> | <b>AYE</b> |
|----------------------------|------------|

**Commissioner Chamblee**  
**Commissioner Daniel**  
**Commissioner McNally**  
**Commissioner Calvin**

**AYE**  
**AYE**  
**AYE**  
**AYE**

**PUBLIC COMMENTS:**

None

**NEW BUSINESS:**

**Independent Audit Presentation**

Dr. Lamberg announced that there would be a presentation from Berman Hopkins Wright & LaHam, CPA and Associates, LLP. This firm conducted the Audit for the HASB. It was head by Mr. Sean Cedar & Laura Ann Pray. Ms. Pray started the introduction advising it was a 12-month period from October 1, 2021, through September 30, 2022, and that the Audit covered financials as well as controls and compliances. The financials included all programs as one opinion unit and information including HUD Real Estate Assessment Center (REAC). Some of the key points were:

1. There were no internal control or compliance findings in the report.
2. There was an unmodified “Clean” opinion.
3. There were no significant deficiencies or material weakness noted.

In the single audit result over the last 3 years the failed areas went from 20 in 2020 to 6 in 2021 to none in 2022. Under the financial Highlights, they went over the comparison of current assets, cash flow along with net position for the years of 2021 and 2022. Under the performance ratio, the HASB when from a quick ratio, (which measures liquidity/solvency for covering current obligations to be paid immediately) when went from 2.1 in 2020 to 3.2 in 2021 to 6.2 in 2022. Under the Months Expendable Net Asset Ratio (MENAR) the HASB went from .06 in 2020 to 2.3 in 2021 to 2.7 in 2022. It was also noted that.

1. There was no finding for the current year.
2. CARES Act funding fully spent.
3. Large increase in net position
4. The Housing Choice Vouchers Reserves are above RNP.

As Mr. Cedar continued, its noted that this was an independent Auditors Report, and that their office had the corporation of all the staff at the HASB.

Each commissioner thanked the Auditors for their report and commended the Housing Authority for compliance and corporation with the Auditors. They also noted the improvement that has occurred over the past three years and how although there have been some areas of continued work, it is evident by the numbers presented that there has been some significant improvement. Commissioner Calvin wanted to thank the auditors as well as the staff for the informative information and the technology that went along with it. She understood the information and it was easy to follow.

**Resolution No 23-4404**

**RESOLUTION NO. 23-4404**

A RESOLUTION BY THE BOARD OF COMMISSIONERS OF THE HOUSING AUTHORITY OF THE CITY OF SOUTH BEND, INDIANA, AUTHORIZING THE EXECUTIVE DIRECTOR TO SBMIT TO THE DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT THE ANNUAL PLAN.

**WHEREAS**, The Housing Authority of the City of South Bend (HASB), Indiana, has been designated by the U.S. Department of Housing and Urban Development as a public housing authority in connection with the Housing Choice Voucher Program, through which HASB administers tenant-based Section 8 rental assistance and Low-Income Public Housing Program: and

**WHEREAS**, Title V of the Quality Housing and Work Responsibility Act of 1998 requires public housing authorities that administer Section 8 assistance and low-income Public Housing programs to set forth certain program-related policies and information in an annual plan (the “Annual Plan”), which must be adopted by the public housing authority’s board of Commissioners; and

**WHEREAS**, following a public notice and comment process and an internal review of relevant policies and procedures, HASB staff has developed the attached Annual Plan for the fiscal year beginning October 1, 2023.

**NOW, THEREFORE, BE IT RESOLVED** that the Board of Commissioners of The Housing Authority of the City of South Bend, Indiana, authorizes the Executive Director to submit to the Department of Housing Authority this Annual Plan that has been approved and adopted by the Board of Commissioners.

**BE IT FURTHER RESOLVED** that this Resolution shall be in full force and effect from the date of its adoption and shall be filed in the permanent records of The Housing Authority of the City of South Bend, Indiana.

Commissioner Calvin asked for a motion. Commissioner Luecke moved for approval of the motion and Commissioner McNally seconded the motion. The vote was as follows.

|                              |            |
|------------------------------|------------|
| <b>Commissioner Luecke</b>   | <b>AYE</b> |
| <b>Commissioner Chamblee</b> | <b>AYE</b> |
| <b>Commissioner Daniel</b>   | <b>AYE</b> |
| <b>Commissioner McNally</b>  | <b>AYE</b> |
| <b>Commissioner Calvin</b>   | <b>AYE</b> |

**RESOLUTION NO. 23-4405**

A RESOLUTION BY THE BOARD OF COMMISSIONERS OF THE HOUSING AUTHORITY OF THE CITY OF SOUTH BEND, INDIANA, AUTHORIZING THE APPROVAL OF THE REVISED ADMISSIONS AND CONTINUED OCCUPANCY PLAN FOR THE PUBLIC HOUSING PROGRAM.

**WHEREAS**, On February 14, 2023, HUD enacted Section 103 of the Housing Opportunity Through Modernization Act (HOTMA) regarding income limits for the Public Housing program. PHAs are required to implement updates to agency plans for this Section within (120) days of enactment.

**WHEREAS**, the U.S. Department of Housing and Urban Development (HUD) requires that Public Housing providers adopt an Admissions and Continued Occupancy Policy (ACOP) to set local policies for the administration of the program in accordance with HUD requirements and local priorities; and

**WHEREAS**, the ACOP and any revisions to said document must be formally adopted by the Housing Authority of South Bend (HASB) Board of Commissioners; and

**WHEREAS**, HASB finds it necessary to revise the existing ACOP to comply with HOTMA requirements and to remain in compliance with HUD rules and regulations; and

**WHEREAS**, HASB is proposing revisions to the following sections of the ACOP: “Over Income Families” (Section V Determining Income and Rent);

**NOW, THEREFORE, BE IT RESOLVED** that the Board of Commissioners of The Housing Authority of the City of South Bend, Indiana, approves the revised Admissions and Continued Occupancy Plan for the Public Housing Program.

**BE IT FURTHER RESOLVED** that this Resolution shall be in full force and effect from the date of its adoption and shall be filed in the permanent records of The Housing Authority of the City of South Bend, Indiana.

Commissioner Calvin advised the motion to approve resolution 23-4405. Commissioner McNally approved the motion and Commissioner Luecke seconded the motion. Questions was called, and Commissioner Chamblee asked if the language that was presented, the language that HUD gave you, because I am trying to figure out the calculation or formular.

Dr Lamberg said basically yes, but the determine of eligibility to annualize their income. Once their income has been annualized, the resident has the option to select the rent format that they would like. Mrs. Mobley said the tenant has the option to go with a flat rate rent or an over-income rent scale. A flat rate rent is a set price and that is all that can be charged based on information from HUD, and the over income rent scale is when rent is compared to market once it is over the flat rate.

Dr Lamberg said that HUD has stated because of the confusion in the changed to HOTMA there will be a series of training. There are other changes but these all have a time frame of when it has to be implemented.

Commissioner Luecke asked if a tenant has been determined to be over income for two consecutive years, at this point they can stay in the unit for 6 more months but need to be made to be in compliance and does this apply to public housing or is there something similar to the HCV program?

Dr Lamberg said yes to the first part and that there has always been an HCV income limit, and if you get to a point where your adjusted income is equal to or greater than the HAP and the HAP is zero, then you stay in that position for six months and then you are moved off the program. This isn't new, and public housing is trying to catch up with an income limitation for how long you can stay in public housing.

Commissioner Daniel asked what happens if a person loses his job after you meet with them and you tell them they have six months?

Dr Lamberg said once they have made the selection then that is their selection.

Attorney Harris said that this is so new that we all are trying to understand it.

The vote went as follows.

|                              |            |
|------------------------------|------------|
| <b>Commissioner Luecke</b>   | <b>AYE</b> |
| <b>Commissioner Chamblee</b> | <b>AYE</b> |
| <b>Commissioner Daniel</b>   | <b>AYE</b> |
| <b>Commissioner McNally</b>  | <b>AYE</b> |
| <b>Commissioner Calvin</b>   | <b>AYE</b> |

#### RESOLUTION NO. 23-4406

A RESOLUTION BY THE BOARD OF COMMISSIONERS OF THE HOUSING AUTHORITY OF THE CITY OF SOUTH BEND, INDIANA, APPROVING THE AWARD OF PROJECT BASED VOUCHERS

**WHEREAS**, On March 13, 2023, HASB published an RFP for Project Based Vouchers.

**WHEREAS**, the Bids were opened on March 27, 2023, and the Executive Director scored the proposals in accordance with the RFP scoring criteria; and

**WHEREAS**, the two responses received meet the requirements of the scoring criteria outlined in the PBV RFP; and

**WHEREAS**, this approval will provide for thirty (30) Project Based Vouchers in new construction development.

**NOW, THEREFORE, BE IT RESOLVED** that the Board of Commissioners of The Housing Authority of the City of South Bend, Indiana, approves the award of Project Based Vouchers to The Monreaux, LLC to place 12 project-based vouchers at the Monreaux Apartments and Diamond View Apartments. LP to place 18 project-based vouchers at the Diamond View Apartments, both of which are new construction.

**BE IT FURTHER RESOLVED** that this Resolution shall be in full force and effect from the date of its adoption and shall be filed in the permanent records of The Housing Authority of the City of South Bend, Indiana.

Commissioner Calvin advised the motion to approve resolution 23-4406. Commissioner Chamblee approved the motion and Commissioner Daniel seconded the motion. Questions was called. Commissioner Luecke asked was there a limit on the number of project-based vouchers. Dr Lamberg said we do not. Prior to advertising I have to say HUD HASB is interested in project basing, and they will make sure we don't exceed the threshold available to us which is 25% and we are nowhere close to that.

The vote was called for and went as follows:

|                              |            |
|------------------------------|------------|
| <b>Commissioner Luecke</b>   | <b>AYE</b> |
| <b>Commissioner Chamblee</b> | <b>AYE</b> |
| <b>Commissioner Daniel</b>   | <b>AYE</b> |
| <b>Commissioner McNally</b>  | <b>AYE</b> |
| <b>Commissioner Calvin</b>   | <b>AYE</b> |

**Executive Director Report –**

**DEPARTMENT REPORTS: a presentation from K. Bailey for FSS**

Katherine stated that currently there are 59 participants enrolled, 46 in the HCV program, 13 in public housing and 28 with escrow accounts with total \$59,232.00. The reason the participants' numbers may fluctuate is because of new participants. If they go down its because of the participants no longer want to participate in the program and they have removed themselves from the program, and even if they remove themselves from the program they are still on HCV or PH. The second reason it may go down is involuntary termination, if they are evicted or removed from PH or HCV and the third reason is for non-compliance which is when I try to reach them at least three different consecutive times and they have not responded to me, I call them, mail them or email them. Once I send out a letter with the intent to terminate them off the program, they have 15 days to respond to me and if not, I will terminate them off the program and their escrow is rescinded. I do have speakers out each month, and I did create a spread sheet to see what the participants liked and disliked about speakers and programs and to see how we can get them more engaged in the program. We partner with several businesses from the community such as Lake City Bank. We meet every Wednesday of the month, or they can go on zoom to view the program. We also work with work one and credit report centers, the excel center and others. Pictures was shown to all of the participants working with Habitat for humanity for homeownerships.

Commissioner Luecke asked when one graduates, does the escrow have to be use for homeownership? Katherine said not really but that is what most of the participants use their escrow for.

Commissioner Luecke asked if someone is terminated or withdrew from the program, what happened to their escrow?

Katherine said the money is rescinded, just recently as January 1, 2023, it goes back into public housing locally it use to go back to HUD. We have 15 new applicants that will show up in June.



## **LOW INCOME PUBLIC HOUSING**

Mrs. Mobley said we have 1585 on the waiting list. In unit vacancies we have 201, and there is a 10-day turnaround time and units occupied we have 393. In the month of April, we leased 3 off the waiting list and transferred 2 and in the mist of leasing up at least 10 and removed 20 off of the wait list. We had 201 total work orders.

Commissioner Daniel asked where you said you removed 20 off the wait list applicants.

Mrs. Mobley said if we don't get a response from a tenant after so many tries or they don't show up for their intake, then we will close out a file. We try to contact a person to see if they are still interested.

Commissioner Luecke asked of the 201 vacant units how many can we put someone in today.

Mrs. Mobley, today 10

Commissioner Luecke asked to have we reached the point where we are leasing up new tenant's vs transferring someone from one unit to another tenant.

Mrs. Mobley said we still have a few that we are moving around but I am focusing more on using the wait list.

## **Housing Choice Voucher Program (HCVP)**

Ms. Wallace said under the HCV program for April we have served 2,295 and have 1,999 on the waiting list. We issued 163 vouchers on the street, 93 requested tenancy 10 new move in 2 new ports in and 15 change of unit. 108 annual reexamination and 31 end of program. We did 399 inspections in April, 88 initial inspections, 28 re-inspections and 191 annual inspections with 10 abatements. Focus on zero income household netted 13% reduction in zero income households. Under the homeless set aside wrap up there was 100 Vouchers leased through referrals from service providers.

Commissioner Daniel asked for the emergency voucher went up by 5, is it because more are requesting more vouchers?

Ms. Wallace said it was because we did that through (ISPDA), they gave us the referral.

Commissioner Luecke asked do we have the number of vouchers that we are allocated?

Ms. Wallace said yes, the funds we get are allocated based on the number of vouchers, 2365 is the number of vouchers we have.

## **FINANCIAL REPORT**

Mr. Delaney went over each amp and pointed out some of the information for each amp started with amp 1. We haven't had any major insurance claims this year, so it is outside of the budget. We haven't drawn down any money yet from the capital fund (1406) probably will draw down later in the year.

Amp 2 legal expenses is 34 % higher than budgeted because we have more evictions, notices and court expenses. Maintenance is less than budget because we are moving focus from 1 and 2 to amps 3 and 4.

Amp 3, rental income is higher than budget because we are doing more income verification and tenants are paying more rent. Office expenses is higher than budget because of the new scanners we are using in order to go paperless. Amp 4, maintenance is higher again because of the shift from 1 and 2 to 3 and 4. Office expense is higher again because of the price of the scanners under HCVP hap the HAP subsidy

is higher due to increase to number of vouchers and number of vouchers. FSS expense is a little bit higher than budget.

Attorney Harris stated that the courts tend to side with the tenant and give them every opportunity possible to remain in housing. The other concern is they view public housing as a last resort, and they are concerned about what happens if they evict pertaining to homelessness. The other thing is there is often free legal assistance through Notre Dame law clinic, having other lawyers involved can slow it down and make it a bit more complicated.

Dr. Lamberg said based on our uniqueness we work very closely with Harris law firm; we did a complete overhaul of our notification so that we can be reassured of greater success. I think the improvement of the wording and notification and to show we have done everything we can possibly do so we are caring for the things up front.

## **Board comments**

Commissioner McNally was happy to see the audit report, which was very nice.

Commissioner Luecke said "Well done.

Commissioner Chamblee said today was particularly uplifting.

Commissioner Daniel said it was definitely a testament of all your hard work, very impressed with all of you, keep up the good work.

Commissioner Calvin wanted to express ditto on the comments made by her colleagues.

Meeting adjourned.

## **Directors Report Agenda**

- I. FAMILY SELF SUFFICIENCY REPORT
- II. LOW INCOME PUBLIC HOUSING
- III. HOUSING CHOICE VOUCHER PROGRAM
- IV. FINANCE REPORT
- V. REAL ESTATE, INVESTMENT and DEVELOPMENT



## FSS Program Participates

The Family Self Sufficiency Program (FSS) promotes the development of local strategies to coordinate public and private resources that help housing choice voucher program participants and public housing tenants obtain employment that will enable participating families to achieve economic independence.

|                | Number FSS Participants enrolled | HCV Program Participants | LIPH Program Participants | Number with Escrow Accounts | Total Amount of Escrow Accounts |
|----------------|----------------------------------|--------------------------|---------------------------|-----------------------------|---------------------------------|
| January 2023   | 63                               | 49                       | 14                        | 31                          | \$49,396.86                     |
| February 2023  | 62                               | 49                       | 13                        | 32                          | \$53,341.86                     |
| March 2023     | 59                               | 46                       | 13                        | 27                          | \$54,109.00                     |
| April 2023     | 59                               | 46                       | 13                        | 28                          | \$59,232.00                     |
| May 2023       | 56                               | 42                       | 14                        | 33                          | \$63,087.00                     |
| June 2023      |                                  |                          |                           |                             |                                 |
| July 2023      |                                  |                          |                           |                             |                                 |
| August 2023    |                                  |                          |                           |                             |                                 |
| September 2023 |                                  |                          |                           |                             |                                 |
| October 2023   |                                  |                          |                           |                             |                                 |
| November 2023  |                                  |                          |                           |                             |                                 |
| December 2023  |                                  |                          |                           |                             |                                 |

### Board Report May 2023

- Typhani Yvette, business owner of The Credit Chick, was the guest speaker at the FSS May monthly meeting. She discussed the importance of credit and how to read your credit report.
- FSS is continuing to recruit participants; she recruited 20 new participants in the month of May.
- FSS will be terminating participants for noncompliance, missed appointments, not returning telephone calls or emails after three attempts.



## LOW INCOME PUBLIC HOUSING (LIPH)

|  | December<br>2022 | January<br>2023 | February<br>2023 | March<br>2023 | April | May  |
|--|------------------|-----------------|------------------|---------------|-------|------|
| <b>Waiting List</b>                    | 1191             | 1480            | 1762             | 1726          | 1585  | 1453 |
| <b>Occupancy Rate</b>                  |                  |                 |                  |               |       |      |
| <b>Unit Turnaround Time<br/>(Days)</b> | 14               | 14              | 10               | 10            | 10    | 10   |

| AMP          | Property                 | Total Units | Units<br>Occupied | Units Vacant          | Units under<br>Vacancy Reduction<br>Program with a<br>Contractor |
|--------------|--------------------------|-------------|-------------------|-----------------------|--|
| <b>1</b>     | <b>Monroe Circle</b>     | <b>92</b>   | <b>0</b>          | <b>92</b>             | <b>0</b><br><b>Section 18<br/>Application</b>                    |
|              | Laurel Court             | 42          | 28                | 14                    | 0  |
|              | Harbor Homes             | 54          | 39                | 15                    | 0  |
| <b>2</b>     | <b>Rabbi Shulman/628</b> | <b>127</b>  | <b>0</b>          | <b>127</b>            | <b>0</b><br><b>Section 18<br/>Application</b>                    |
|              | West Scott /501          | 127         | 68                | 59                    | 0  |
|              | Quads                    | 52          | 45                | 7                     | 2  |
| <b>3</b>     | South Bend Avenue        | 20          | 15                | 5                     | 0  |
|              | Edison Gardens           | 19          | 16                | 3                     | 4  |
|              | Twyckenham               | 18          | 13                | 5                     | 3  |
|              | Scattered Sites 09       | 47          | 33                | 14                    | 0  |
|              | Scattered Sites 10       | 66          | 34                | 32                    | 0  |
| <b>4</b>     | LaSalle Landing          | 24          | 20                | 4                     | 0  |
|              | Scattered Sites 12       | 44          | 24                | 20                    | 2  |
|              | Scattered Sites 17       | 50          | 30                | 20                    | 0  |
|              | Scattered Sites 18       | 31          | 17                | 14                    | 0  |
| <b>TOTAL</b> |                          | <b>813</b>  | <b>382</b>        | <b>432-92-127=213</b> | <b>4</b>   |

| Property                              | Emergency |          |          |          | Routine    |            |            |            |
|---------------------------------------|-----------|----------|----------|----------|------------|------------|------------|------------|
|                                       | February  | March    | April    | May      | February   | March      | April      | May        |
| Monroe Circle                         | 0         | 0        | 0        | 0        | 2          | 0          | 0          | 0          |
| Plaza Apts.                           | 0         | 0        | 0        | 0        | 0          | 0          | 0          | 0          |
| Laurel Court                          | 0         | 0        | 0        | 0        | 5          | 42         | 3          | 45         |
| Lasalle Landing                       | 0         | 0        | 0        | 0        | 16         | 12         | 16         | 13         |
| South Bend Avenue                     | 0         | 0        | 0        | 0        | 12         | 12         | 11         | 19         |
| Westcott Apts.                        | 0         | 0        | 1        | 0        | 65         | 64         | 31         | 64         |
| Harbor Homes                          | 0         | 0        | 1        | 0        | 44         | 33         | 30         | 39         |
| Scattered Sites (IN15-09)             | 0         | 0        | 0        | 0        | 19         | 15         | 7          | 27         |
| Scattered Duplexes (10)               | 0         | 0        | 0        | 0        | 30         | 19         | 26         | 49         |
| Edison Gardens                        | 1         | 0        | 0        | 0        | 10         | 20         | 15         | 17         |
| Twyckenham                            | 0         | 0        | 0        | 0        | 4          | 5          | 8          | 11         |
| Scattered Sites (IN15-12)             | 0         | 0        | 0        | 0        | 6          | 7          | 9          | 18         |
| Acquisition Scattered Sites (IN15-17) | 0         | 0        | 0        | 0        | 11         | 16         | 6          | 33         |
| Scattered Sites (IN15-18)             | 0         | 0        | 0        | 0        | 5          | 7          | 4          | 12         |
| Non-Tenant work orders                | 0         | 0        | 0        | 0        | 20         | 17         | 21         | 24         |
| <b>Totals</b>                         | <b>1</b>  | <b>0</b> | <b>2</b> | <b>0</b> | <b>249</b> | <b>284</b> | <b>201</b> | <b>371</b> |

| Tenant Account Receivables (TARS / rent collection) |              |               |            |         |      |
|---|--------------|---------------|------------|---------|------|
| Property  | January 2023 | February 2023 | March 2023 | April   | May  |
| Monroe Circle                                       | 0            | 0             | 0          | 0       | 0    |
| Plaza Apts.   | 0            | 0             | 0          | 0       | 0    |
| Laurel Court  | 128%         | 265%          | 117%       | 96%     | 69%  |
| Lasalle Landing                                     | 102          | 109%          | 107%       | 72%     | 51%  |
| South Bend Avenue                                   | 108          | 108%          | 98%        | 101%    | 89%  |
| Westcott / QUADS Apts.                              | 94           | 109%          | 99%        | 100.44% | 92%  |
| Harbor Homes  | 101          | 91%           | 109%       | 100.13% | 99%  |
| Scattered Sites (IN15-09)                           | 134          | 106%          | 97%        | 98%     | 96%  |
| Scattered Duplexes (IN15-10)                        | 100          | 98%           | 134%       | 90%     | 108% |
| Edison Gardens                                      | 130          | 71%           | 190%       | 75%     | 126% |
| Twyckenham  | 90           | 121%          | 115%       | 61%     | 94%  |
| Scattered Sites (IN15-12)                           | 107          | 64%           | 185%       | 100.16% | 68%  |
| Acquisition Scattered Sites (IN15-17)               | 92           | 87%           | 133%       | 76%     | 102% |
| Scattered Sites (IN15-18)                           |              | 1.05%         | 321%       | 85%     | 84%  |

| March 2023               |                     |                    | TARS Percentage |
|--------------------------|---------------------|--------------------|-----------------|
| Development              | Billed              | Collected          | % collected     |
| Laurel Court             | \$3,547.00          | \$2,453.00         | 69%             |
| LaSalle Landing          | \$4,653.00          | \$2,378.00         | 51%             |
| South Bend Avenue        | \$6,272.00          | \$5,577.00         | 89%             |
| West Scott/ Quads (501)  | \$32,304.94         | \$29,685.49        | 92%             |
| Harbor Homes             | \$7,422.00          | \$7,419.00         | 99%             |
| Scattered Sites 15-09    | \$11,883.00         | \$11,393.00        | 96%             |
| Scattered Duplexes 15-10 | \$9,575.48          | \$10,311.08        | 108%            |
| Edison                   | \$3,338.00          | \$4,216.00         | 126%            |
| Twyckenham               | \$4,344.00          | \$4,076.00         | 94%             |
| Scattered 15-12          | \$7,243.00          | \$4,935.00         | 68%             |
| Scattered 15-17          | \$15,382.00         | \$15,668.50        | 102%            |
| Scattered 15-18          | \$1,917.00          | \$1,604.28         | 84%             |
| <b>Total</b>             | <b>\$107,881.42</b> | <b>\$99,716.35</b> | <b>92%</b>      |

**In the month of May, we leased up three (3) off the waiting list. Transfers two (2)**

**Closed intake file for no response and removed one hundred and forth five (145) from waiting list applicants.**

**Units ready to lease ten (6)**

### Capital Expenditures (Grants)

| Grant Year   | Awarded                | Expended              | Remaining Balance   | Action taken  |
|--|------------------------|-----------------------|---|---|
| <b>2021</b>  | \$2,312,670.00         | \$2,312,670.00        | 0.00  | Development<br>Planning/Demolition  |
| <b>2022</b>  | \$2,830,526.00         | \$702,870.00          | \$2,127,656.00  | Vacancy Reduction   |
| <b>2023</b>  | \$2,839,396.00         | \$0.00                | \$2,839,396.00  | Vacancy Reduction and other<br>Capital Activities                             |
| <b>2021 PH Shortfall</b>   | \$1,137,402.00         | \$769,350.00          | <b>first allocation = 0</b><br>Second allocation 0.00<br>Third allocation<br>\$368,052.00 | South Bend Avenue/<br>Vacancy Reduction Planning<br>\$360,052 available 08/23 |
| <b>2022 PH Shortfall</b>   | \$1,548,904.00         | \$769,255.00          | \$779,649   | Vacancy Reduction<br>AMPS 3 and 4<br>Funds available<br>March 2023            |
| <b>Safety and Security<br/>Grant Locks Change</b>                  | \$103,461.00           | \$103,461.00          | 0.00  | Changing Locks on all PH<br>Properties  |
| <b>Safety and Security<br/>Grant Carbon<br/>Monoxide Detectors</b> | \$122,076.00           | \$58,509.00           | \$63,567.00   | Purchase and install Carbon<br>Monoxide Detectors in every<br>unit            |
| <b>Total</b>   | <b>\$10,894,435.00</b> | <b>\$4,716,115.00</b> | <b>\$6,178,320.00</b>   |   |



**Housing Choice Voucher Program (HCVP)**

**May 2023**

| <b>HCVP Program Summary</b>    |   |                     |                      |                   |                   |                 |
|--------------------------------|---|---------------------|----------------------|-------------------|-------------------|-----------------|
|                                |   | <b>January 2023</b> | <b>February 2023</b> | <b>March 2023</b> | <b>April 2023</b> | <b>May 2023</b> |
| <b>Total Households Served</b> |   | 2,217               | 2,239                | 2,262             | 2,295             | 2,321           |
|                                | <b>HCVP</b>                             | 2,005               | 2,027                | 2,055             | 2,071             | 2,096           |
|                                | <b>VASH Veterans</b>                    | 84                  | 84                   | 81                | 79                | 80              |
|                                | <b>FSS</b>                              | 44                  | 44                   | 43                | 40                | 38              |
|                                | <b>Emergency Housing Vouchers (EHV)</b> | 9                   | 10                   | 10                | 14                | 18              |
|                                | <b>Foster Youth (FYI)</b>               | 13                  | 12                   | 12                | 11                | 11              |
|                                | <b>Port In</b>                          | 9                   | 9                    | 8                 | 8                 | 8               |
|                                | <b>Port Out</b>                         | 30                  | 29                   | 28                | 26                | 25              |
|                                | <b>Relocation</b>                       | 44                  | 44                   | 44                | 45                | 45              |
| <b>Reporting Rate</b>          |   | 100%                | 99%                  | 99%               | 98%               | 98%             |
| <b>Waiting List</b>            |   | 719                 | 321                  | 128               | 1,999             | 1,924           |

| <b>HCVP Process Summary</b>                          |                     |                      |                   |                   |                 |
|--|---------------------|----------------------|-------------------|-------------------|-----------------|
|  | <b>January 2023</b> | <b>February 2023</b> | <b>March 2023</b> | <b>April 2023</b> | <b>May 2023</b> |
| <b>Vouchers Issued (On the Street)</b>               | 173                 | 207                  | 224               | 163               | 96              |
| <b>Request for Tenancy Approval (RFTA) Processed</b> | 87                  | 63                   | 118               | 93                | 53              |
| <b>New Move In/Port In/Changes of Unit</b>           | 33/1/8              | 46/0/13              | 35/1/8            | 10/2/15           | 19/3/7          |
| <b>Interim Changes</b>                               | 55                  | 76                   | 76                | 104               | 168             |
| <b>Annual Reexaminations</b>                         | 128                 | 130                  | 136               | 108               | 93              |
| <b>End of Participation</b>                          | 16                  | 15                   | 33                | 31                | 38              |



| <b>HCVF Housing Quality Standard Inspections Summary</b> |                     |                      |                   |                   |                 |
|--|---------------------|----------------------|-------------------|-------------------|-----------------|
|  | <b>January 2023</b> | <b>February 2023</b> | <b>March 2023</b> | <b>April 2023</b> | <b>May 2023</b> |
| <b>Total Number of Inspections</b>                       | <b>301</b>          | <b>305</b>           | <b>476</b>        | <b>399</b>        | <b>485</b>      |
| <b>Initial Inspections</b>                               | <b>99</b>           | <b>64</b>            | <b>109</b>        | <b>88</b>         | <b>51</b>       |
| <b>Initial Re-inspections</b>                            | <b>32</b>           | <b>23</b>            | <b>22</b>         | <b>28</b>         | <b>25</b>       |
| <b>Annual Inspections</b>                                | <b>111</b>          | <b>137</b>           | <b>220</b>        | <b>191</b>        | <b>292</b>      |
| <b>Annual Re-inspections</b>                             | <b>77</b>           | <b>57</b>            | <b>91</b>         | <b>78</b>         | <b>90</b>       |
| <b>Abatement Inspections</b>                             | <b>12</b>           | <b>12</b>            | <b>21</b>         | <b>10</b>         | <b>10</b>       |
| <b>Special Inspections</b>                               | <b>2</b>            | <b>4</b>             | <b>2</b>          | <b>2</b>          | <b>1</b>        |
| <b>No Show %</b>   | <b>10%</b>          | <b>9%</b>            | <b>10%</b>        | <b>8%</b>         | <b>10%</b>      |

**Highlights:**

- **VMS Training Completed (A. Delaney, B. Hueni, T. Murphy, L. Wallace)**
- **Homelessness Initiative Completed – Over 100 individuals and families leased through referral program.**
- **Attended Real Services’ Community Action Meeting**
- **HUD 2023 Income Limit Update Implemented**

Financial Report  
For the June 2023, Board Meeting  
Prepared for the Executive Director  
And  
The Board of Commissioners

## **Development and Procurement Activities**

- The RFP for Lawn Maintenance closed May 18<sup>th</sup>, 2023, and the HASB received 4 responses to the RFP which are now being vetted to award contracts for lawn maintenance.
- The Demolition of Monroe Circle is scheduled to begin in June 2023. The City of South Bend is working on the bid award, which is scheduled for approval Tuesday, June 13.