



**PUBLIC NOTICE & AGENDA**  
**BELOIT COMMUNITY DEVELOPMENT AUTHORITY**  
**City Hall Forum - 100 State Street, Beloit, WI 53511**  
**4:30 PM**  
**Wednesday, July 28, 2021**

1. CALL TO ORDER AND ROLL CALL
2. PUBLIC COMMENT
3. MINUTES
  - 3.a. Consideration of the minutes of the June 23, 2021 Community Development Authority meeting  
[Attachment](#)
4. BELOIT HOUSING AUTHORITY
  - 4.a. Presentation of the June Activity Report (Cole)  
[Attachment](#)
  - 4.b. Presentation of the May Financial Report (Cole)  
[Attachment](#)
  - 4.c. Discussion of Beloit Housing Authority's Housing Choice Voucher and Low-Income Public Housing local waiting list preferences (Cole)  
[Attachment](#)
5. ADJOURNMENT

\*\* Please note that, upon reasonable notice, at least 24 hours in advance, efforts will be made to accommodate the needs of disabled individuals through appropriate aids and services. For additional information to request this service, please contact the City Clerk's Office at 364-6680, 100 State Street, Beloit, WI 53511.

## Minutes

### Beloit Community Development Authority

100 State Street, Beloit WI 53511

June 23, 2021

4:30 P.M.

The regular meeting of the City of Beloit Community Development Authority was held on Wednesday, June 23, 2021 in the Forum of Beloit City Hall, 100 State Street.

#### 1. Call to Order and Roll Call

Meeting was called to order by Vice-Chairperson Gorman at 4:35 PM.

**Present:** Commissioners Gorman and Hartke; Councilors Forbeck and Leavy

**Absent:** Commissioners Douglas and Ellison

**Staff Present:** Julie Christensen, Clinton Cole, Teri Downing and Ann Purifoy

#### 2. Public Comment

None

#### 3. Consideration of the Minutes of the May 26, 2021 regular meeting of the Community Development Authority.

Motion was made by Councilor Forbeck and seconded by Councilor Leavy to approve the minutes of the May 26, 2021 regular meeting of the Community Development Authority. Motion carried unanimously.

#### 4. Beloit Housing Authority

##### a. Presentation of the May Activity Report

Clinton Cole, Beloit Housing Authority Director, gave a brief summary of the report.

Councilor Forbeck asked for explanation of the current Section 8 Per Unit Cost (PUC). Clint stated that this is the average Housing Assistance Payment (HAP) paid to landlords on behalf of Section 8 participants. We monitor this number to determine how we utilize our resources for Section 8 vouchers.

Councilor Leavy inquired about how applicants are pulled from waiting lists. Clint explained that applicant position on waiting lists is based on number of preference points, date and time. Preferences were determined and approved by CDA Board.

##### b. Presentation of the March/April Financial Report

Clinton Cole gave a brief summary of the report.

5. **Community and Housing Services**

a. Consideration of Resolution 2021-06, Recommending 2022 Community Development Block Grant (CDBG) Local Funding Priorities

Teri Downing, Deputy Community Development Director, presented the staff report and recommendation for the local funding priorities.

Councilor Leavy asked where homelessness fits in the funding priorities. Ms. Downing indicated that homelessness is included under Public Service Programs. Councilor Leavy requested that the wording be revised to include the word “homeless.”

Commissioner Hartke moved and Councilor Forbeck seconded a motion to approve an amendment to Resolution 2021-06, Attachment A, 1. to include “shelter for homeless households.”

Staff recommends the following 2022 CDBG local funding priorities which include “shelter for homeless households”:

1. Public Service Programs which focus on comprehensive case management strategies, with priority given to neighborhood stabilization activities, housing assistance, shelter for homeless households, education in life skills, employment training that corresponds with local employment opportunities, healthcare access, transportation, childcare, and activities which meet one of the NRSA objectives.
2. Code Enforcement
3. Housing Rehabilitation
4. Housing Activities (Direct Homeownership Assistance/Down-payment and closing cost assistance)
5. Economic Development Activities, with priority given to Small Business and Microenterprise Assistance and Technical Job Training
6. Program Administration
7. Fair Housing

Commissioner Hartke asked what services are provided for the elderly and what the priority is. Ms. Downing stated that the priority to address elderly needs would be included in the Public Service programs. Beloit currently has Meals on Wheels, ample elderly subsidized housing and Housing Rehab programs to keep people in their homes.

Councilor Leavy moved and Commissioner Hartke seconded a motion to approve Resolution 2021-06 as amended. Motion carried unanimously.

6. **Adjournment**

Motion by Councilor Leavy and seconded by Councilor Forbeck to adjourn the meeting at 5:08 p.m. Motion carried unanimously.

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Fransaesca Ellison, Chairperson

# REPORTS AND PRESENTATIONS TO COMMUNITY DEVELOPMENT AUTHORITY



<b>Agenda Number:</b>	4a		
<b>Topic:</b>	June Activity Report		
<b>Date:</b>	July 28, 2021		
<b>Presenter:</b>	Clinton Cole	<b>Division:</b>	Beloit Housing Authority

## Overview/Background Information

Each month, the Housing Authority provides an activity report to the Community Development Authority. This report is for information only.

## Key Issues

**Public Housing:**  
At the end of this reporting period, there were no public housing vacancies. Eight annual and five interim certifications were completed. No public housing inspections were conducted in June.

**Section 8:**  
467 vouchers were housed on June 30, 2021, with five newly-issued voucher holders either searching for units or waiting for passed inspections. Four portable vouchers were paid by BHA, and seven port-in vouchers were administered. The Housing Specialists completed 32 annual and 19 interim recertifications during this reporting period. 58 Housing Quality Standards (HQS) inspections were completed in June. The BHA Inspector is utilizing personal protective equipment (PPE) to ensure her safety, as well as the safety of the families occupying the units.

## Conformance with Strategic Plan

Approval of this action would conform with the stated purpose of the following strategic goal:

- Goal #1 - Create and Sustain Safe and Healthy Neighborhoods
- Goal #2 - Create and Sustain a High Performing Organization
- Goal #3 - Create and Sustain Economic and Residential Growth
- Goal #4 - Create and Sustain a High Quality of Life
- Goal #5 - Create and Sustain High Quality Infrastructure and Connectivity
- Goal #6 - Create and Sustain a Positive Image, Enhance Communications and Engage the Community

## Sustainability

(If applicable, briefly comment on the sustainable long term impact of this policy or program related to how it will impact both the built and natural environment. Consider whether the policy or program will reduce dependence upon fossil fuels, reduce dependence on chemicals and other manufacturing substances that accumulate in nature, reduce dependence on activities that harm life sustaining eco-systems, and/or meet the hierarchy of present and future human needs fairly and efficiently. Write N/A if not applicable) N/A

## Action Required/Recommendation

No action required. Information only.

## Fiscal Note/Budget Impact

All fiscal/budget impacts are noted in the report.

## Attachments

June Activity Report

**Beloit Community Development Authority  
Activity Report to Board for June 2021**

**PUBLIC HOUSING**

Total Public Housing Units	131 Units	
Occupied on 6/30/2021	131 Units	100% Occupancy
Vacancies on 6/30/2021	0 Units	0% Vacancy
Vacancies by Type		
Elderly	0 Units	100% Occupancy
Family	0 Units	100% Occupancy

**Public Housing Inspections**

Six annual inspections and one special inspection were completed during this reporting period.

**Public Housing Activities**

Annual Recertifications	8
Interim Recertifications	5
Tenant notices to Vacate *Not due to eviction	0
New Tenants	0
Transfers	0
Lease Terminations	0
Possible Program Violations	2
Evictions	0

**Public Housing Briefings**

Number Notified	0
Number Briefed	0

**SECTION 8 PROGRAM**

Total Section 8 Vouchers	598 Vouchers	
Total Under Lease on 6/30/2021	468 Vouchers	78% Utilization
Total Portable Vouchers Paid	4 Vouchers	
Total Port Out*	4 Vouchers	
Total Port In*	7 Vouchers	
June HCV HAP Funds Received	\$218,770	
June HCV HAP Funds Expended	\$225,406.96	
Current Per Unit Cost (PUC)	\$482	
* Port Out – Not absorbed by other Housing Authorities; paid by Beloit Housing Authority		
* Port In – Portable vouchers administered by BHA but paid by other Housing Authorities		

**Section 8 Inspections**

The BHA Inspector completed 34 annual inspections, 11 initial inspections, and 13 reinspections during this reporting period.

**Section 8 Activities**

New Participants	2
Annual Recertifications	32
Interim Recertifications	19
Abatements	2
Unit Transfers	2
Possible Program Violations	0
End of Program	3
Port outs	0

**Section 8 Briefings**

Number Notified	21
Number Briefed/Vouchers Issued	0

**APPLICATIONS ON WAITING LIST**

Public Housing East	65
Public Housing West	54
Parker Bluff	184
Section 8 Program	243

- 0 Applicants removed for Repayment Default
- 0 Applicants removed for unreported income
- 0 Applicants removed for unauthorized occupants
- 0 Applicants removed for debts owed

Some applicants are on both lists, some are not

**Section 8 waiting list opened 4/4/11**

# REPORTS AND PRESENTATIONS TO COMMUNITY DEVELOPMENT AUTHORITY



<b>Agenda Number:</b>	4b		
<b>Topic:</b>	May 2021 Financial Report		
<b>Date:</b>	July 28, 2021		
<b>Presenter:</b>	Clinton Cole	<b>Division:</b>	Beloit Housing Authority

## Overview/Background Information

Each month, the Housing Authority provides a financial report to the Community Development Authority. This report is for information only.

## Key Issues

Attached is the Beloit Housing Authority Financial Statement prepared by the BHA Accountant as of May 31, 2021.

At the end of this reporting period, the Low Income Public Housing (LIPH) program income was \$305,776.33 and the LIPH expenses were \$219,207.59. There was a surplus of \$86,568.74 in LIPH.

At the end of this reporting period, Inflows of revenue from LIPH Grants total \$48,714.09 and related grant expenses total \$48,714.09.

At the end of this reporting period, the Project Based Voucher (PBV) program income was \$46,357.88 and the expenses were \$77,463.70. The PBV had a deficit of \$31,105.80. The deficit is the result of the proceeds from the sale of 745 Highland Avenue in 2021 being transferred to the LIPH Fund. This transfer is due to the BHA receiving permission from HUD to utilize the sales proceeds of the Project Based units for operation and administration of its current public housing units.

As mentioned previously, operating expenses will continue to be charged to the Project-Based Fund during FY 2021. This is due to the BHA's continued possession of the last Project-Based unit located at 240 Portland Avenue. For example, utilities, insurance, repair costs, any payroll costs associated with the property will continue to be charged to the fund, while no rental income is being received. The BHA is waiting for HUD-legal to review the property information for 240 Portland Avenue and give instruction on what must be done with the unit. Once that process is complete, this fund will be closed.

At the end of this reporting period, Phase 1 program income was \$119,700.02 and the expenses were \$119,489.02. Phase 1 had a surplus of \$211.00. Of this surplus, \$.02 is the Housing Authority's portion.

At the end of this reporting period, Phase 2 program income was \$111,538.15 and the expenses were \$113,899.30. Phase 2 had a deficit of \$2,361.15. Of this deficit, \$.24 is the Housing Authority's portion. The primary reason for the deficit is, that beginning in FY 2020, the City began billing out Phase 2 related garbage collection in one lump amount as opposed to quarterly amounts before this time. The garbage collection yearly fee was charged to BHA on the April 2021 City Billing Invoice. In addition, several appliances have been replaced this year at an average cost of \$794 each.

At the end of this reporting period, the Housing Choice Voucher (HCV) program income was \$1,365,187.96 and expenses were \$1,298,184.00. The HCV program had a surplus of \$67,003.96.

Debts owed BHA collected through May 2021: Total \$9,537.15  
 TRIP Program: \$9,227.15 Repayments: \$310.00

## Conformance with Strategic Plan

- Approval of this agreement would conform with the stated purpose of the following strategic goal:
- Goal #1 - Create and Sustain Safe and Healthy Neighborhoods
  - Goal #2 - Create and Sustain a High Performing Organization
  - Goal #3 - Create and Sustain Economic and Residential Growth



- Goal #4 - Create and Sustain a High Quality of Life
- Goal #5 - Create and Sustain High Quality Infrastructure and Connectivity
- Goal #6 - Create and Sustain a Positive Image, Enhance Communications and Engage the Community

**Sustainability**

(If applicable, briefly comment on the sustainable long term impact of this policy or program related to how it will impact both the built and natural environment. Consider whether the policy of program will reduce dependence upon fossil fuels, reduce dependence on chemicals and other manufacturing substances that accumulate in nature, reduce dependence on activities that harm life sustaining eco-systems, and/or meet the hierarchy of present and future human needs fairly and efficiently. Write N/A if not applicable)

N/A

**Action Required/Recommendation**

No action required. Information only.

**Fiscal Note/Budget Impact**

All fiscal/budget impacts are noted in the report.

**Attachments**

May 2021 Financial Report

## Consolidated 2021 Budget Report for LIPH/PBV - As of May 31, 2021

	YTD Actual					Annual Board Approved Budget		
	Income	Approved YTD	LIPH	LIPH Grants	PBV	Total	LIPH/PBV	Total
1 Dwelling Rental	-					-		-
2 Excess Utilities	-					-		-
3 Interest on Unrestricted Fund Investments	20.83		19.22			19.22	50.00	50.00
4 Income - Transfer In from Other Funds	-		69,835.97			69,835.97		-
5 Other Income - Tenants	-					-		-
6 HAP Fraud Recovery & FSS Forfeitures	-					-		-
7 Other Income - Bad Debt Collections	-		12,827.86			12,827.86		-
8 Other Income - Laundry/Copy Fees/Misc	11,666.67		7,385.28			7,385.28	28,000.00	28,000.00
9 Other Income - CFP Operation Money	61,073.75					-	146,577.00	146,577.00
10 Other Income - Sale of Asset Gain/Loss	27,083.33				46,357.88	46,357.88	65,000.00	65,000.00
11 Admin Fees Earned - HUD	-					-		-
12 Incoming Billable Admin Fees/Oper Sub	-					-		-
13 ROSS/FSS/CFP Grant	42,083.33			48,714.09		48,714.09	101,000.00	101,000.00
14 HAP Subsidy	-					-		-
15 Operating Subsidy	195,788.33		215,708.00			215,708.00	469,892.00	469,892.00
<b>Total Income</b>	<b>337,716.25</b>		<b>305,776.33</b>	<b>48,714.09</b>	<b>46,357.88</b>	<b>400,848.30</b>	<b>810,519.00</b>	<b>810,519.00</b>
Expenses	Approved YTD	LIPH	LIPH Grant	PBV	Total	LIPH/PBV	Total	
<b>Administrative Expenses</b>								
16 Admin Salaries	41,312.92		36,178.69		60.89	36,239.58	99,151.00	99,151.00
17 ROSS/FSS Coordinator Admin Salaries	17,678.33			15,198.18		15,198.18	42,428.00	42,428.00
18 Admin Employee Benefits	17,197.08		15,297.79		27.72	15,325.51	41,273.00	41,273.00
19 ROSS/FSS Coordinator Admin Benefits	6,826.67			4,866.70		4,866.70	16,384.00	16,384.00
20 Advertising & Marketing	20.83					-	50.00	50.00
21 Legal	104.17					-	250.00	250.00
22 Staff Training	729.17			3,087.50		3,087.50	1,750.00	1,750.00
23 Travel	104.17		60.20			60.20	250.00	250.00
24 Accounting Consultants	3,020.83		2,247.00		606.00	2,853.00	7,250.00	7,250.00
25 Audit Fee	4,766.67		7,274.50			7,274.50	11,440.00	11,440.00
26 Telephone	1,179.17		645.70			645.70	2,830.00	2,830.00
27 Postage	1,000.00		1,142.77			1,142.77	2,400.00	2,400.00
28 Office Supplies	1,041.67		440.68			440.68	2,500.00	2,500.00
29 Memberships & Publications	853.33		340.18			340.18	2,048.00	2,048.00
30 Bank Fees	-					-		-
31 Computer Maintenance	-					-		-
32 Copier Expenses	1,166.67		990.63			990.63	2,800.00	2,800.00
33 Office Equipment Maintenance	-					-		-
34 Postage Machine	-					-		-
35 Software Maintenance	2,500.00		2,369.19			2,369.19	6,000.00	6,000.00
36 Outgoing Portable Admin Fees	-					-		-
37 Sundry Administration/Compliance Fees	-			54.00	84.56	138.56		-
38 Port-In HAP Expense	-					-		-
39 Management Fees	-					-		-
40 Eviction & Collection Agent Fees	-					-		-
41 HAP Expense (net fraud recovery to HUD)	-					-		-
HAP Overfunding (Underfunding)	-					-		-

	<b>Maintenance Expenses</b>	-							
42	Maintenance Salaries	-	2,257.22			2,257.22		-	
43	Casual Labor - Maintenance	-				-		-	
44	Maintenance Benefits	-	729.11			729.11		-	
45	Maintenance Materials & Supplies	416.67	13.94			13.94	1,000.00	1,000.00	
46	Plumbing Supplies	-				-		-	
47	Locks, Locksets & Keys	-				-		-	
48	Electrical Supplies	-				-		-	
49	Painting Supplies	-				-		-	
50	Cleaning Supplies	-	99.21			99.21		-	
51	Equipment Repair Parts	-				-		-	
52	Maintenance Contracted Services	5,833.33	1,617.42			1,617.42	14,000.00	14,000.00	
53	Refuse Removal Services	41.67				-	100.00	100.00	
54	Plumbing Repair Services	-				-		-	
55	Heating/AC Repair Services	-				-		-	
56	Electric Repair Service	-				-		-	
57	Window Repair Service	-				-		-	
58	Automotive Repairs/Fuel	-	729.09			729.09		-	
59	Elevator Repair & Maintenance	833.33				-	2,000.00	2,000.00	
60	Pest Control Services	-				-		-	
61	Cable TV	-				-		-	
62	Answering Service	-	1,525.13			1,525.13		-	
63	Misc Contracts	-				-		-	
64	Clean/Paint Units	-				-		-	
	<b>Utilities Expenses</b>	-							
65	Water/Sewer	833.33	416.88	246.11		662.99	2,000.00	2,000.00	
66	Electricity	2,916.67	2,078.60	217.19		2,295.79	7,000.00	7,000.00	
67	Natural Gas	708.33	984.92	413.26		1,398.18	1,700.00	1,700.00	
	<b>Other Operating Expenses</b>	-							
68	Protective Services Contract	10,416.67	768.50			768.50	25,000.00	25,000.00	
69	Insurance	4,956.25	5,523.39			5,523.39	11,895.00	11,895.00	
70	PILOT	833.33				-	2,000.00	2,000.00	
71	Compensated Absences	-				-		-	
72	Collection Losses	-				-		-	
73	Replacement Reserves & Debt Pmt-Princ	-				-		-	
74	Other General Expense/Asset Mgmt Fees	144,537.50	135,476.85	5,972.00		141,448.85	346,890.00	346,890.00	
75	Casualty Losses - Non Capitalized	-				-		-	
76	Capital Expenditures	61,073.75		25,507.71		25,507.71	146,577.00	146,577.00	
77	Transfer In / Out	-			69,835.97	69,835.97		-	
	<b>Total Expense</b>	<b>332,902.50</b>	<b>219,207.59</b>	<b>48,714.09</b>	<b>77,463.70</b>	<b>345,385.38</b>	798,966.00	-	798,966.00

**Net Income/(Loss):**

86,568.74	-	(31,105.82)	55,462.92
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**Cash Flow Statement**  
**Beloit Housing Authority**  
**LIPH/PBV**  
**As of 5/31/2021**

	BHA YTD Actual	LIPH Grants Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
<b>Income</b>					
Dwelling Rent/Utilities	-		-		-
Interest on Investments	19.22		-	0.00%	19.22
Other Income	136,406.99		239,577.00	56.94%	(103,170.01)
HUD Admin Fees			-		-
HUD Grants/Subsidies	215,708.00	48,714.09	570,892.00	46.32%	(306,469.91)
<b>Total Income</b>	<b>352,134.21</b>	<b>48,714.09</b>	<b>810,469.00</b>		<b>(409,620.70)</b>

	BHA YTD Actual	LIPH Grants Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
<b>Expenses</b>					
Administrative					
Salaries/Benefits	51,565.09	20,064.88	199,236.00	35.95%	127,606.03
Office Expenses	12,841.59	3,141.50	30,768.00	51.95%	14,784.91
Office Contracted Services	3,359.82		8,800.00	38.18%	5,440.18
Oper Sub Transfer/Mgmt Fee Pd			-		-
Housing Assistance Pmts			-		-
HAP Payments Port In					
Maintenance					
Salaries/Benefits	2,986.33		-		(2,986.33)
Materials & Supplies	113.15	-	1,000.00	11.32%	886.85
Maintenance Contracts	3,871.64		16,100.00	24.05%	12,228.36
Utilities	4,356.96		10,700.00	40.72%	6,343.04
Other Operating					
Protective Services	768.50		25,000.00	3.07%	24,231.50
Insurance	5,523.39		11,895.00	46.43%	6,371.61
PILOT	-		2,000.00	0.00%	2,000.00
Other Operating Expenses	211,284.82	25,507.71	493,467.00	47.99%	256,674.47
<b>Total Expenses</b>	<b>296,671.29</b>	<b>48,714.09</b>	<b>798,966.00</b>		<b>453,580.62</b>

Net Admin Income (Loss)	55,462.92	-			
Net HAP Income (Loss)					
<b>Total YTD Income (Loss)</b>	<b>55,462.92</b>	<b>-</b>			

## Consolidated 2021 Budget Report for Phase 1 - As of May 31, 2021

	Income	YTD Actual			Annual Board Approved Budget	
		Approved YTD	Phase 1	Phase 1 Total	Phase 1	Total
1	Dwelling Rental	47,917.92	46,301.00	46,301.00	115,003.00	115,003.00
2	Excess Utilities	-	-	-	-	-
3	Interest on Unrestricted Fund Investments	83.33	84.61	84.61	200.00	200.00
4	Income - Transfer In from Other Funds	-	-	-	-	-
5	Other Income - Tenants	-	1,480.54	1,480.54	-	-
6	HAP Fraud Recovery & FSS Forfeitures	-	-	-	-	-
7	Other Income - Bad Debt Collections	-	-	-	-	-
8	Other Income - Laundry/Copy Fees/Misc	-	-	-	-	-
9	Other Income - CFP Operation Money	-	-	-	-	-
10	Other Income - Sale of Asset Gain/Loss	-	-	-	-	-
11	Admin Fees Earned - HUD	-	-	-	-	-
12	Incoming Billable Admin Fees/Oper Sub	62,500.00	71,833.87	71,833.87	150,000.00	150,000.00
13	ROSS/CFP Grant	-	-	-	-	-
14	HAP Subsidy	-	-	-	-	-
15	Operating Subsidy	-	-	-	-	-
	<b>Total Income</b>	<b>110,501.25</b>	<b>119,700.02</b>	<b>119,700.02</b>	265,203.00	265,203.00

	Expenses	Approved YTD	Phase 1	Phase 1 Total	Annual Board Approved Budget	
					Phase 1	Total
	<b>Administrative Expenses</b>					
16	Admin Payroll Expenses	30,182.08	25,363.51	25,363.51	72,437.00	72,437.00
17	FSS Coordinator Admin Salaries	-	-	-	-	-
18	FSS Coordinator Admin Benefits	-	-	-	-	-
19	Advertising & Marketing	20.83	41.71	41.71	50.00	50.00
20	Legal	416.67	-	-	1,000.00	1,000.00
21	Staff Training	-	-	-	-	-
22	Travel	-	-	-	-	-
23	Accounting Consultants	3,333.33	2,595.00	2,595.00	8,000.00	8,000.00
24	Audit Fee	5,000.00	10,000.00	10,000.00	12,000.00	12,000.00
25	Telephone	-	-	-	-	-
26	Postage	-	-	-	-	-
27	Office Supplies	62.50	-	-	150.00	150.00
28	Memberships & Publications	-	-	-	-	-
29	Bank Fees	-	19.30	19.30	-	-
30	Computer Maintenance	-	-	-	-	-
31	Copier Expenses	-	-	-	-	-
32	Office Equipment Maintenance	-	-	-	-	-
33	Postage Machine	-	-	-	-	-
34	Software Maintenance	-	-	-	-	-
35	Outgoing Portable Admin Fees	-	-	-	-	-
36	Sundry Administration/Compliance Fees	1,666.67	4,150.99	4,150.99	4,000.00	4,000.00
37	Port-In HAP Expense	-	-	-	-	-
38	Management Fees	1,666.67	2,340.66	2,340.66	4,000.00	4,000.00

39	Eviction & Collection Agent Fees	-	-	-	-	-
40	HAP Expense (net fraud recovery to HUD)	-	-	-	-	-
	HAP Overfunding (Underfunding)	-	-	-	-	-
	<b>Maintenance Expenses</b>	-	-	-	-	-
42	Maintenance Payroll Expenses	40,183.75	36,210.60	36,210.60	96,441.00	96,441.00
43	Casual Labor - Maintenance	-	-	-	-	-
44	Maintenance Materials & Supplies	2,916.67	7,923.43	7,923.43	7,000.00	7,000.00
45	Plumbing Supplies	-	-	-	-	-
46	Locks, Locksets & Keys	-	-	-	-	-
47	Electrical Supplies	-	-	-	-	-
48	Painting Supplies	-	-	-	-	-
49	Cleaning Supplies	-	-	-	-	-
50	Equipment Repair Parts	-	-	-	-	-
51	Maintenance Contracted Services	4,479.17	6,667.70	6,667.70	10,750.00	10,750.00
52	Refuse Removal Services	520.83	990.00	990.00	1,250.00	1,250.00
53	Plumbing Repair Services	-	-	-	-	-
54	Heating/AC Repair Services	416.67	3,179.00	3,179.00	1,000.00	1,000.00
55	Electric Repair Service	-	-	-	-	-
56	Window Repair Service	-	-	-	-	-
57	Automotive Repairs/Fuel	-	627.17	627.17	-	-
58	Elevator Repair & Maintenance	-	-	-	-	-
59	Pest Control Services	625.00	-	-	1,500.00	1,500.00
60	Cable TV	-	-	-	-	-
61	Answering Service	-	-	-	-	-
62	Misc Contracts	-	-	-	-	-
63	Clean/Paint Units	-	-	-	-	-
	<b>Utilities Expenses</b>	-	-	-	-	-
64	Water/Sewer	2,291.67	743.74	743.74	5,500.00	5,500.00
65	Electricity	583.33	265.53	265.53	1,400.00	1,400.00
66	Natural Gas	416.67	98.38	98.38	1,000.00	1,000.00
	<b>Other Operating Expenses</b>	-	-	-	-	-
67	Protective Services Contract	-	5,000.00	5,000.00	-	-
68	Insurance	7,084.17	7,680.44	7,680.44	17,002.00	17,002.00
69	PILOT	4,791.67	4,237.71	4,237.71	11,500.00	11,500.00
70	Compensated Absences	-	-	-	-	-
71	Collection Losses	-	-	-	-	-
72	Replacement Reserves & Debt Pmt-Princ	-	-	-	-	-
73	Other General Expense/Asset Mgmt Fees	1,364.58	1,354.15	1,354.15	3,275.00	3,275.00
74	Casualty Losses - Non Capitalized	-	-	-	-	-
75	Capital Expenditures	-	-	-	-	-
76	Transfer In / Out	-	-	-	-	-
	<b>Total Expense</b>	<b>108,022.92</b>	<b>119,489.02</b>	<b>119,489.02</b>	259,255.00	-

<b>Net Income/(Loss):</b>	211.00	211.00
<b>Housing Authority's Portion of Net Income/(Loss):</b>	0.02	

**Cash Flow Statement**  
**Beloit Housing Authority**  
**Phase 1**  
**As of 5/31/2021**

	LLC Phase 1 Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
<b>Income</b>				
Dwelling Rent/Utilities	46,301.00	115,003.00	40.26%	(68,702.00)
Interest on Investments	84.61	200.00	42.31%	(115.39)
Other Income	73,314.41	150,000.00	48.88%	(76,685.59)
HUD Admin Fees		-		-
HUD Grants/Subsidies		-		-
<b>Total Income</b>	<b>119,700.02</b>	<b>265,203.00</b>		<b>(145,502.98)</b>

	LLC Phase 1 Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
<b>Expenses</b>				
Administrative				
Salaries/Benefits	25,363.51	72,437.00	35.01%	47,073.49
Office Expenses	16,807.00	25,200.00	66.69%	8,393.00
Office Contracted Services		-		-
Oper Sub Transfer/Mgmt Fee F	2,340.66	4,000.00	58.52%	1,659.34
Housing Assistance Pmts		-		-
HAP Payments Port In				
Maintenance				
Salaries/Benefits	36,210.60	96,441.00	37.55%	60,230.40
Materials & Supplies	7,923.43	7,000.00	113.19%	(923.43)
Maintenance Contracts	11,463.87	14,500.00	79.06%	3,036.13
Utilities	1,107.65	7,900.00	14.02%	6,792.35
Other Operating				
Protective Services	5,000.00	-		(5,000.00)
Insurance	7,680.44	17,002.00	45.17%	9,321.56
PILOT	4,237.71	11,500.00	36.85%	7,262.29
Other Operating Expenses	1,354.15	3,275.00	41.35%	1,920.85
<b>Total Expenses</b>	<b>119,489.02</b>	<b>259,255.00</b>		<b>139,765.98</b>

Net Admin Income (Loss)	211.00
Net HAP Income (Loss)	
<b>Total YTD Income (Loss)</b>	<b>211.00</b>
Housing Authority's Portion	<b>0.02</b>

## Consolidated 2021 Budget Report for Phase 2 - As of May 31, 2021

	Income	YTD Actual			Annual Board Approved Budget	
		Approved YTD	Phase 2	Phase 2 Total	Phase 2	Total
1	Dwelling Rental	58,333.33	56,655.00	56,655.00	140,000.00	140,000.00
2	Excess Utilities	-	-	-	-	-
3	Interest on Unrestricted Fund Investments	312.50	177.81	177.81	750.00	750.00
4	Income - Transfer In from Other Funds	-	-	-	-	-
5	Other Income - Tenants	-	1,361.29	1,361.29	-	-
6	HAP Fraud Recovery & FSS Forfeitures	-	-	-	-	-
7	Other Income - Bad Debt Collections	-	490.07	490.07	-	-
8	Other Income - Laundry/Copy Fees/Misc	-	-	-	-	-
9	Other Income - CFP Operation Money	-	-	-	-	-
10	Other Income - Sale of Asset Gain/Loss	-	-	-	-	-
11	Admin Fees Earned - HUD	-	-	-	-	-
12	Incoming Billable Admin Fees/Oper Sub	56,875.00	52,853.98	52,853.98	136,500.00	136,500.00
13	ROSS/CFP Grant	-	-	-	-	-
14	HAP Subsidy	-	-	-	-	-
15	Operating Subsidy	-	-	-	-	-
	<b>Total Income</b>	<b>115,520.83</b>	<b>111,538.15</b>	<b>111,538.15</b>	<b>277,250.00</b>	<b>277,250.00</b>

	Expenses	YTD Actual			Annual Board Approved Budget	
		Approved YTD	Phase 2	Phase 2 Total	Phase 2	Total
	<b>Administrative Expenses</b>					
16	Admin Payroll Expenses	23,327.92	18,666.91	18,666.91	55,987.00	55,987.00
17	FSS Coordinator Admin Salaries	-	-	-	-	-
18	FSS Coordinator Admin Benefits	-	-	-	-	-
19	Advertising & Marketing	20.83	41.71	41.71	50.00	50.00
20	Legal	833.33	-	-	2,000.00	2,000.00
21	Staff Training	-	-	-	-	-
22	Travel	-	-	-	-	-
23	Accounting Consultants	4,166.67	2,595.00	2,595.00	10,000.00	10,000.00
24	Audit Fee	4,583.33	10,000.00	10,000.00	11,000.00	11,000.00
25	Telephone	-	-	-	-	-
26	Postage	-	-	-	-	-
27	Office Supplies	62.50	-	-	150.00	150.00
28	Memberships & Publications	-	-	-	-	-
29	Bank Fees	-	-	-	-	-
30	Computer Maintenance	-	-	-	-	-
31	Copier Expenses	-	-	-	-	-
32	Office Equipment Maintenance	-	-	-	-	-
33	Postage Machine	-	-	-	-	-
34	Software Maintenance	-	-	-	-	-
35	Outgoing Portable Admin Fees	-	-	-	-	-
36	Sundry Administration/Compliance Fees	833.33	4,876.43	4,876.43	2,000.00	2,000.00
37	Port-In HAP Expense	-	-	-	-	-
38	Management Fees	5,833.33	5,044.62	5,044.62	14,000.00	14,000.00



39	Eviction & Collection Agent Fees	-		-		-	
40	HAP Expense (net fraud recovery to HUD)	-		-		-	
	HAP Overfunding (Underfunding)	-				-	
	<b>Maintenance Expenses</b>						
42	Maintenance Payroll Expenses	30,152.08	28,111.17	28,111.17	72,365.00	72,365.00	
43	Casual Labor - Maintenance	-		-		-	
44	Maintenance Materials & Supplies	4,583.33	2,689.40	2,689.40	11,000.00	11,000.00	
45	Plumbing Supplies	-		-		-	
46	Locks, Locksets & Keys	-		-		-	
47	Electrical Supplies	-		-		-	
48	Painting Supplies	-		-		-	
49	Cleaning Supplies	-		-		-	
50	Equipment Repair Parts	-		-		-	
51	Maintenance Contracted Services	6,250.00	6,903.59	6,903.59	15,000.00	15,000.00	
52	Refuse Removal Services	1,458.33	2,808.00	2,808.00	3,500.00	3,500.00	
53	Plumbing Repair Services	-		-		-	
54	Heating/AC Repair Services	500.00	925.00	925.00	1,200.00	1,200.00	
55	Electric Repair Service	-		-		-	
56	Window Repair Service	-		-		-	
57	Automotive Repairs/Fuel	-	578.18	578.18		-	
58	Elevator Repair & Maintenance	2,500.00		-	6,000.00	6,000.00	
59	Pest Control Services	625.00		-	1,500.00	1,500.00	
60	Cable TV	-	1,542.30	1,542.30		-	
61	Answering Service	-		-		-	
62	Misc Contracts	-		-		-	
63	Clean/Paint Units	-		-		-	
	<b>Utilities Expenses</b>						
64	Water/Sewer	5,416.67	2,402.99	2,402.99	13,000.00	13,000.00	
65	Electricity	7,291.67	5,655.72	5,655.72	17,500.00	17,500.00	
66	Natural Gas	3,541.67	3,441.91	3,441.91	8,500.00	8,500.00	
	<b>Other Operating Expenses</b>						
67	Protective Services Contract	1,666.67	5,324.85	5,324.85	4,000.00	4,000.00	
68	Insurance	3,948.75	4,281.24	4,281.24	9,477.00	9,477.00	
69	PILOT	4,791.67	4,422.13	4,422.13	11,500.00	11,500.00	
70	Compensated Absences	-		-		-	
71	Collection Losses	-		-		-	
72	Replacement Reserves & Debt Pmt-Princ	-		-		-	
73	Other General Expense/Asset Mgmt Fees	2,927.08	3,588.15	3,588.15	7,025.00	7,025.00	
74	Casualty Losses - Non Capitalized	-		-		-	
75	Capital Expenditures	-		-		-	
76	Transfer In / Out	-		-		-	
	<b>Total Expense</b>	<b>115,314.17</b>	<b>113,899.30</b>	<b>113,899.30</b>	276,754.00	-	276,754.00

**Net Income/(Loss):** (2,361.15) (2,361.15)  
**Housing Authority's Portion of Net Income/(Loss):** (0.24)

**Cash Flow Statement**  
**Beloit Housing Authority**  
**Phase 2**  
**As of 5/31/2021**

	LLC Phase 2 Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
<b>Income</b>				
Dwelling Rent/Utilities	56,655.00	140,000.00	40.47%	(83,345.00)
Interest on Investments	177.81	750.00	23.71%	(572.19)
Other Income	54,705.34	136,500.00	40.08%	(81,794.66)
HUD Admin Fees		-		-
HUD Grants/Subsidies		-		-
<b>Total Income</b>	<b>111,538.15</b>	<b>277,250.00</b>		<b>(165,711.85)</b>

	LLC Phase 1 Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
<b>Expenses</b>				
Administrative				
Salaries/Benefits	18,666.91	55,987.00	33.34%	37,320.09
Office Expenses	17,513.14	25,200.00	69.50%	7,686.86
Office Contracted Services		-		-
Oper Sub Transfer/Mgmt Fee F	5,044.62	14,000.00	36.03%	8,955.38
Housing Assistance Pmts		-		-
HAP Payments Port In				
Maintenance				
Salaries/Benefits	28,111.17	72,365.00	38.85%	44,253.83
Materials & Supplies	2,689.40	11,000.00	24.45%	8,310.60
Maintenance Contracts	12,757.07	27,200.00	46.90%	14,442.93
Utilities	11,500.62	39,000.00	29.49%	27,499.38
Other Operating				
Protective Services	5,324.85	4,000.00	133.12%	(1,324.85)
Insurance	4,281.24	9,477.00	45.18%	5,195.76
PILOT	4,422.13	11,500.00	38.45%	7,077.87
Other Operating Expenses	3,588.15	7,025.00	51.08%	3,436.85
<b>Total Expenses</b>	<b>113,899.30</b>	<b>276,754.00</b>		<b>162,854.70</b>

Net Admin Income (Loss)	(2,361.15)
Net HAP Income (Loss)	
<b>Total YTD Income (Loss)</b>	<b>(2,361.15)</b>
Housing Authority's Portion	<u>(0.24)</u>

## Consolidated 2021 Budget Report for Housing Choice Voucher - As of May 31, 2021

	YTD Actual				Annual Board Approved Budget		
	Income	Approved YTD	HCV	HCV Total	HCV	Total	
1 Dwelling Rental	-			-			-
2 Excess Utilities	-			-			-
3 Interest on Unrestricted Fund Investments	416.67		211.31	211.31	1,000.00		1,000.00
4 Income - Transfer In from Other Funds	-			-			-
5 Other Income - Tenants	-			-			-
6 HAP Fraud Recovery & FSS Forfeitures	-			-			-
7 Other Income - Bad Debt Collections	-		291.20	291.20			-
8 Other Income - Laundry/Copy Fees/Misc	-		14,167.45	14,167.45			-
9 Other Income - CFP Operation Money	-			-			-
10 Other Income - Sale of Asset Gain/Loss	-			-			-
11 Admin Fees Earned - HUD	127,360.00		142,720.00	142,720.00	305,664.00		305,664.00
12 Incoming Billable Admin Fees/Oper Sub	833.33			-	2,000.00		2,000.00
13 ROSS/CFP Grant	-			-			-
14 HAP Subsidy	-		1,207,798.00	1,207,798.00			-
15 Operating Subsidy	-			-			-
<b>Total Income</b>	<b>128,610.00</b>		<b>1,365,187.96</b>	<b>1,365,187.96</b>	-	308,664.00	308,664.00

	YTD Actual				Annual Board Approved Budget		
	Expenses	Approved YTD	HCV	HCV Total	HCV	Total	
<b>Administrative Expenses</b>							
16 Admin Salaries	78,865.83		80,721.29	80,721.29	189,278.00		189,278.00
17 FSS Coordinator Admin Salaries	-			-			-
18 Admin Employee Benefits	25,159.17		26,910.86	26,910.86	60,382.00		60,382.00
19 FSS Coordinator Admin Benefits	-			-			-
20 Advertising & Marketing	-		22.75	22.75			-
21 Legal	104.17			-	250.00		250.00
22 Staff Training	729.17			-	1,750.00		1,750.00
23 Travel	166.67		359.80	359.80	400.00		400.00
24 Accounting Consultants	3,020.83		2,622.00	2,622.00	7,250.00		7,250.00
25 Audit Fee	4,766.67		7,274.50	7,274.50	11,440.00		11,440.00
26 Telephone	1,166.67		472.23	472.23	2,800.00		2,800.00
27 Postage	-			-			-
28 Office Supplies	833.33		688.14	688.14	2,000.00		2,000.00
29 Memberships & Publications	280.42		270.18	270.18	673.00		673.00
30 Bank Fees	1,250.00		1,213.95	1,213.95	3,000.00		3,000.00
31 Computer Maintenance	-			-			-
32 Copier Expenses	1,250.00		990.63	990.63	3,000.00		3,000.00
33 Office Equipment Maintenance	-			-			-
34 Postage Machine	1,666.67		1,552.54	1,552.54	4,000.00		4,000.00
35 Software Maintenance	3,229.17		3,496.98	3,496.98	7,750.00		7,750.00
36 Outgoing Portable Admin Fees	-			-			-
37 Sundry Administration/Compliance Fees	-		1,605.86	1,605.86			-
38 Port-In HAP Expense	-		13,014.06	13,014.06			-

39	Management Fees	-		-			
40	Eviction & Collection Agent Fees	-		-			
41	HAP Expense (net fraud recovery to HUD)	1,194,187.08		1,155,051.97	1,155,051.97	2,866,049.00	2,866,049.00
	HAP Overfunding (Underfunding)	-		52,746.03			-
	<b>Maintenance Expenses</b>						
42	Maintenance Salaries	-		-			-
43	Casual Labor - Maintenance	-		-			-
44	Maintenance Benefits	-		-			-
45	Maintenance Materials & Supplies	-		-			-
46	Plumbing Supplies	-		-			-
47	Locks, Locksets & Keys	-		-			-
48	Electrical Supplies	-		-			-
49	Painting Supplies	-		-			-
50	Cleaning Supplies	-		-			-
51	Equipment Repair Parts	-		-			-
52	Maintenance Contracted Services	-		-			-
53	Refuse Removal Services	208.33		-		500.00	500.00
54	Plumbing Repair Services	-		-			-
55	Heating/AC Repair Services	-		-			-
56	Electric Repair Service	-		-			-
57	Window Repair Service	-		-			-
58	Automotive Repairs/Fuel	-		-			-
59	Elevator Repair & Maintenance	-		-			-
60	Pest Control Services	-		-			-
61	Cable TV	-		-			-
62	Answering Service	-		-			-
63	Misc Contracts	-		-			-
64	Clean/Paint Units	-		-			-
	<b>Utilities Expenses</b>						
65	Water/Sewer	-		-			-
66	Electricity	-		-			-
67	Natural Gas	-		-			-
	<b>Other Operating Expenses</b>						
68	Protective Services Contract	-		-			-
69	Insurance	900.00		1,067.85	1,067.85	2,160.00	2,160.00
70	PILOT	-		-			-
71	Compensated Absences	-		-			-
72	Collection Losses	-		-			-
73	Replacement Reserves & Debt Pmt-Princ	-		-			-
74	Other General Expense/Asset Mgmt Fees	1,833.33		848.41	848.41	4,400.00	4,400.00
75	Casualty Losses - Non Capitalized	-		-			-
76	Capital Expenditures	-		-			-
77	Transfer In / Out	-		-			-
	<b>Total Expense</b>	<b>1,319,617.50</b>		<b>1,298,184.00</b>	<b>1,298,184.00</b>	-	3,167,082.00

**Net Income/(Loss):**

67,003.96

**Cash Flow Statement  
Beloit Housing Authority  
Housing Choice Voucher  
As of 5/31/2021**

	HCV YTD Actual	YTD Budget	Percentage of Budget Used	Variance Over (Under)
<b>Income</b>				
Dwelling Rent/Utilities		-		-
Interest on Investments	211.31	1,000.00	21.13%	(788.69)
Other Income	14,458.65	2,000.00	722.93%	12,458.65
HUD Admin Fees	142,720.00	305,664.00	46.69%	(162,944.00)
HUD Grants/Subsidies	1,207,798.00	-	0.00%	1,207,798.00
<b>Total Income</b>	<b>1,365,187.96</b>	<b>308,664.00</b>		<b>1,056,523.96</b>

	HCV YTD Actual	YTD Budget	Percentage of Budget Used	Variance Under (Over)
<b>Expenses</b>				
Administrative				
Salaries/Benefits	107,632.15	249,660.00	43.11%	142,027.85
Office Expenses	14,529.41	29,563.00	49.15%	15,033.59
Office Contracted Services	6,040.15	14,750.00	40.95%	8,709.85
Oper Sub Transfer/Mgmt Fee Pd		-		-
Housing Assistance Pmts	1,155,051.97	2,866,049.00	40.30%	1,710,997.03
HAP Payments Port In	13,014.06		0.00%	(13,014.06)
Maintenance				
Salaries/Benefits		-		-
Materials & Supplies		-		-
Maintenance Contracts		500.00	0.00%	500.00
Utilities		-		-
Other Operating				
Protective Services		-		-
Insurance	1,067.85	2,160.00	49.44%	1,092.15
PILOT		-		-
Other Operating Expenses	848.41	4,400.00	19.28%	3,551.59
<b>Total Expenses</b>	<b>1,298,184.00</b>	<b>3,167,082.00</b>		<b>1,868,898.00</b>

**Net Income/(Loss):** 67,003.96

# REPORTS AND PRESENTATIONS TO COMMUNITY DEVELOPMENT AUTHORITY



<b>Agenda Number:</b>	4c		
<b>Topic:</b>	Beloit Housing Authority Waiting List Preferences		
<b>Date:</b>	July 28, 2021		
<b>Presenter:</b>	Clinton Cole	<b>Division:</b>	Beloit Housing Authority

## Overview/Background Information

In accordance with the Code of Federal Regulations (CFR) 24 CFR 982.207 (see attached), the Beloit Housing Authority has established local preferences to select families from the Public Housing and Housing Choice Voucher waiting lists.

## Key Issues

The Beloit Housing Authority has established the following local preferences for organizing and selecting families from the Public Housing and Housing Choice Voucher waiting lists:

- Displaced by a Federal, State, or locally declared disaster within the last 6 months - 20 points
- Beloit residency. Applicant must live, work, or attend school within the zip code boundary of Beloit, Wisconsin - 20 points
- Participant in program for victims of domestic violence - 10 points
- Income falls between 0%-30% of the county median income limit by family size - 5 points
- Honorably discharged United States Veteran - 5 points
- Graduate of a Transitional Housing program within the past 6 months - 5 points
- Handicapped accessible unit required - 3 points

The BHA's current policy states that families will be selected from the waiting list based on the targeted funding or selection preference(s) for which they qualify, and in accordance with the PHA's hierarchy of preferences, if applicable. Within each targeted funding or preference category, families will be selected on a first-come, first-served basis according to the date and time their complete application is received by the PHA.

## Conformance with Strategic Plan

Approval of this action would conform with the stated purpose of the following strategic goal:

- Goal #1 - Create and Sustain Safe and Healthy Neighborhoods
- Goal #2 - Create and Sustain a High Performing Organization
- Goal #3 - Create and Sustain Economic and Residential Growth
- Goal #4 - Create and Sustain a High Quality of Life
- Goal #5 - Create and Sustain High Quality Infrastructure and Connectivity
- Goal #6 - Create and Sustain a Positive Image, Enhance Communications and Engage the Community

## Sustainability

(If applicable, briefly comment on the sustainable long term impact of this policy or program related to how it will impact both the built and natural environment. Consider whether the policy or program will reduce dependence upon fossil fuels, reduce dependence on chemicals and other manufacturing substances that accumulate in nature, reduce dependence on activities that harm life sustaining eco-systems, and/or meet the hierarchy of present and future human needs fairly and efficiently. Write N/A if not applicable) N/A

## Action Required/Recommendation

No action required. Information only.

## Fiscal Note/Budget Impact

All fiscal/budget impacts are noted in the report.

## Attachments

24 CFR 982.207, Chapter 4-III.C. of BHA's Housing Choice Voucher Administrative Plan, BHA application waiting list priority criteria

24 CFR § 982.207 - Waiting list: Local preferences in admission to program.

**§ 982.207 Waiting list: Local preferences in admission to program.**

**(a) *Establishment of PHA local preferences.***

(1) The PHA may establish a system of local preferences for selection of families admitted to the program. PHA selection preferences must be described in the PHA administrative plan.

(2) The PHA system of local preferences must be based on local housing needs and priorities, as determined by the PHA. In determining such needs and priorities, the PHA shall use generally accepted data sources. The PHA shall consider public comment on the proposed public housing agency plan (as received pursuant to § 903.17 of this chapter) and on the consolidated plan for the relevant jurisdiction (as received pursuant to part 91 of this title).

(3) The PHA may limit the number of applicants that may qualify for any local preference.

(4) The PHA shall not deny a local preference, nor otherwise exclude or penalize a family in admission to the program, solely because the family resides in a public housing project. The PHA may establish a preference for families residing in public housing who are victims of a crime of violence (as defined in 18 U.S.C. 16).

**(b) *Particular local preferences -***

**(1) *Residency requirements or preferences.***

(i) Residency requirements are prohibited. Although a PHA is not prohibited from adopting a residency preference, the PHA may only adopt or implement residency preferences in accordance with non-discrimination and equal opportunity requirements listed at § 5.105(a) of this title.

(ii) A residency preference is a preference for admission of persons who reside in a specified geographic area (“residency preference area”). A county or municipality may be used as a residency preference area. An area smaller than a county or municipality may not be used as a residency preference area.

(iii) Any PHA residency preferences must be included in the statement of PHA policies that govern eligibility, selection and admission to the program, which is included in the PHA annual plan (or supporting documents) pursuant to part 903 of this title. Such policies must specify that use of a residency preference will not have the purpose or effect of delaying or otherwise denying admission to the program based on the race, color, ethnic origin, gender, religion, disability, or age of any member of an applicant family.

(iv) A residency preference must not be based on how long an applicant has resided or worked in a residency preference area.

(v) Applicants who are working or who have been notified that they are hired to work in a residency preference area must be treated as residents of the residency preference area. The PHA may treat graduates of, or active participants in, education and training programs in a residency preference area as residents of the residency preference

area if the education or training program is designed to prepare individuals for the job market.

**(2) Preference for working families.** The PHA may adopt a preference for admission of working families (families where the head, spouse or sole member is employed). However, an applicant shall be given the benefit of the working family preference if the head and spouse, or sole member is age 62 or older, or is a person with disabilities.

**(3) Preference for person with disabilities.** The PHA may adopt a preference for admission of families that include a person with disabilities. However, the PHA may not adopt a preference for admission of persons with a specific disability.

**(4) Preference for victims of domestic violence, dating violence, sexual assault, or stalking.** The PHA should consider whether to adopt a local preference for admission of families that include victims of domestic violence, dating violence, sexual assault, or stalking.

**(5) Preference for single persons who are elderly, displaced, homeless, or persons with disabilities.** The PHA may adopt a preference for admission of single persons who are age 62 or older, displaced, homeless, or persons with disabilities over other single persons.

**(c) Selection among families with preference.** The PHA system of preferences may use either of the following to select among applicants on the waiting list with the same preference status:

(1) Date and time of application; or

(2) A drawing or other random choice technique.

**(d) Preference for higher-income families.** The PHA must not select families for admission to the program in an order different from the order on the waiting list for the purpose of selecting higher income families for admission to the program.

**(e) Verification of selection method.** The method for selecting applicants from a preference category must leave a clear audit trail that can be used to verify that each applicant has been selected in accordance with the method specified in the administrative plan.

[64 FR 26643, May 14, 1999, as amended at 64 FR 56912, Oct. 21, 1999; 65 FR 16821, Mar. 30, 2000; 81 FR 80816, Nov. 16, 2016]



#### 4-III.C. SELECTION METHOD

PHAs must describe the method for selecting applicant families from the waiting list, including the system of admission preferences that the PHA will use [24 CFR 982.202(d)].

##### **Local Preferences [24 CFR 982.207; HCV p. 4-16]**

PHAs are permitted to establish local preferences, and to give priority to serving families that meet those criteria. HUD specifically authorizes and places restrictions on certain types of local preferences. HUD also permits the PHA to establish other local preferences, at its discretion. Any local preferences established must be consistent with the PHA plan and the consolidated plan, and must be based on local housing needs and priorities that can be documented by generally accepted data sources.

##### PHA Policy

The PHA will use the following local preferences:

- Displaced by a federal, state or local declared disaster within the last 6 months. (20 Points)
- Beloit residency. Applicant must live, work or attend school within the zip code boundary of Beloit, Wisconsin. (20 Points)
- Participant in program for victims of domestic violence. (10 Points)
- Income falls between 0% - 30% of the county median income limit by family size. (5 Points)
- Honorably discharged United States Veteran. (5 Points)
- Graduate of a Transitional Housing Program within the last 6 months. (5 Points)
- Handicapped accessible unit required. (3 Points)

### **Income Targeting Requirement [24 CFR 982.201(b)(2)]**

HUD requires that extremely low-income (ELI) families make up at least 75 percent of the families admitted to the HCV program during the PHA's fiscal year. ELI families are those with annual incomes at or below the federal poverty level or 30 percent of the area median income, whichever number is higher. To ensure this requirement is met, a PHA may skip non-ELI families on the waiting list in order to select an ELI family.

Low-income families admitted to the program that are "continuously assisted" under the 1937 Housing Act [24 CFR 982.4(b)], as well as low-income or moderate-income families admitted to the program that are displaced as a result of the prepayment of the mortgage or voluntary termination of an insurance contract on eligible low-income housing, are not counted for income targeting purposes [24 CFR 982.201(b)(2)(v)].

#### PHA Policy

The PHA will monitor progress in meeting the income targeting requirement throughout the fiscal year. Extremely low-income families will be selected ahead of other eligible families on an as-needed basis to ensure the income targeting requirement is met.

### **Order of Selection**

The PHA system of preferences may select families based on local preferences according to the date and time of application or by a random selection process (lottery) [24 CFR 982.207(c)]. If a PHA does not have enough funding to assist the family at the top of the waiting list, it is not permitted to skip down the waiting list to a family that it can afford to subsidize when there are not sufficient funds to subsidize the family at the top of the waiting list [24 CFR 982.204(d) and (e)].

#### PHA Policy

Families will be selected from the waiting list based on the targeted funding or selection preference(s) for which they qualify, and in accordance with the PHA's hierarchy of preferences, if applicable. Within each targeted funding or preference category, families will be selected on a first-come, first-served basis according to the date and time their complete application is received by the PHA. Documentation will be maintained by the PHA as to whether families on the list qualify for and are interested in targeted funding. If a higher placed family on the waiting list is not qualified or not interested in targeted funding, there will be a notation maintained so that the PHA does not have to ask higher placed families each time targeted selections are made.

## WAITING LIST PRIORITY CRITERIA

Beloit Housing Authority has established local preferences. Check all which apply to your household:

\_\_\_\_\_ Displaced by a federal, state or local declared disaster within the last 6 months. *Governmental disaster documentation is required.* (20 Points)

\_\_\_\_\_ Beloit resident. Applicant must live, work or attend school within the zip code boundary of Beloit, Wisconsin. *Documentation must be provided such as a lease, utility bill, pay stub, or school record.* (20 Points)

\_\_\_\_\_ Participant in program for victims of domestic violence. *Verification must be provided by the Domestic Violence Program Director and documentation of a pattern of abuse within the last 6 months such as police reports or court records and HUD-50066 form.* (10 Points)

\_\_\_\_\_ Income falls between 0% - 30% of the county median income limit by family size. (5 Points)

1 Person	2 Person	3 Person	4 Person	5 Person	6 Person	7 Person	8 Person
\$15,350	\$17,550	\$21,960	\$26,500	\$31,040	\$35,580	\$40,120	\$44,660

\_\_\_\_\_ Graduate of a Transitional Housing Program within the last 6 months. *Documentation by the Transitional Housing Program Director is required listing entry and graduation date.* (5 Points)

\_\_\_\_\_ Honorably discharged United States Veteran. *You must present a DD214.* (5 Points)

\_\_\_\_\_ Handicapped accessible unit required. *Documentation by a medical professional must be provided that handicap accessibility is required.* (3 Points)

## BACKGROUND INFORMATION:

**Have you or any other adult members ever used any names(s) or social security numbers(s) other than the one you are currently using?**  Yes  No

If yes, please list and explain: \_\_\_\_\_

**Have you or any member of your household ever been convicted any crime other than traffic ticket or have any charges pending against them?**  Yes  No

If yes, who: \_\_\_\_\_

Explanation: \_\_\_\_\_

**Are you or any member of your household subject to a lifetime state sex offender registration program in any state?**  Yes  No

If yes, who and which state: \_\_\_\_\_

**List all states you and any household member have lived in the past five years:** \_\_\_\_\_

**Have you or any household member ever been a participant in any rental assistance or public housing program?**  Yes  No

If yes, where and when did you participate? \_\_\_\_\_