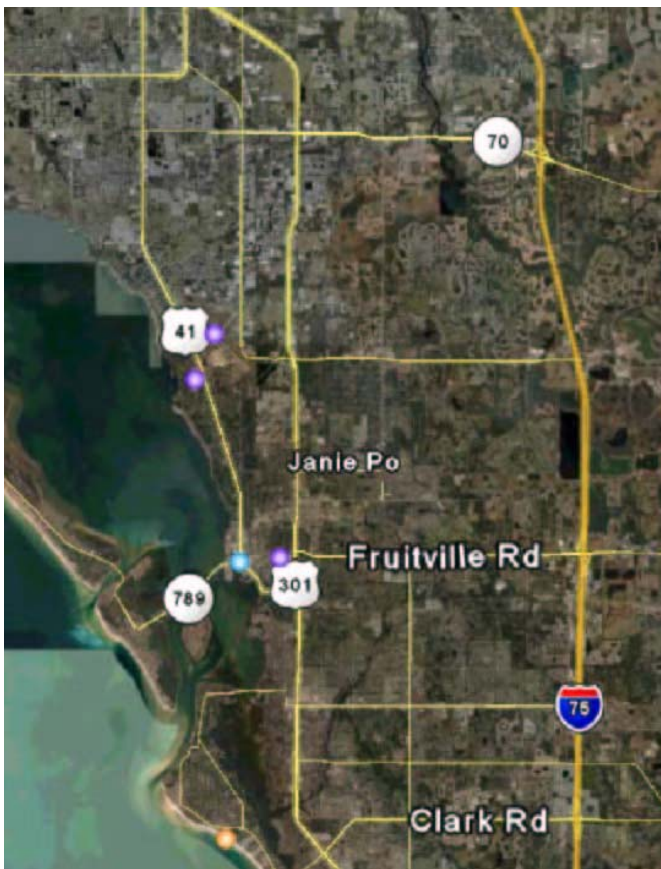




Phase I Relocation Area

**JANIE POE**  
(Phase I)  
Central Avenue  
Sarasota, Florida



## **CHOICE-BASED RELOCATION PLAN**

William Russell, Executive Director  
Sarasota Housing Authority  
1300 6<sup>th</sup> Street  
Sarasota, Florida 34236

September 26, 2007

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# RESIDENT RELOCATION PLAN

**1 Existing Project Summary**  
(as of: June 30, 2007)

**HOUSING AUTHORITY NAME:** Sarasota Housing Authority (SHA)  
**ADDRESS:** 1300 6<sup>th</sup> Street, Sarasota, FL 34236  
**PHONE NUMBER:** (941) 361-6210

**DESCRIPTION OF THE RELOCATION:** All existing residents will be required to move from Buildings 5, 6, 8, 9 & 10 of the Janie Poe public housing community (Phase I area) in order to accommodate the planned revitalization project. The buildings in the Phase I area will be demolished, therefore, all moves are considered to be 12 months or more in duration for the purpose of providing moving and relocation assistance. Even though households will be provided with all assistance required under the Uniform Relocation Act for a move of 12 months or more in duration, relocated residents will be eligible for preference for occupancy in the newly revitalized community in accordance with this relocation plan.

**ESTIMATED START DATE OF RELOCATION MOVES:** October 1, 2007

**HOUSING DEVELOPMENT NAME(S):** Janie Poe  
**HOUSING DEVELOPMENT NUMBER** FL 008-05 **and** **YEAR BUILT:** 1971  
**TOTAL NUMBER OF UNITS (PHASE I):** 52  
**NUMBER OF OCCUPIED UNITS (PHASE I):** 50  
**NUMBER OF VACANT UNITS (PHASE I):** 2  
**SIZE OF SITE (entire site):** 12.86 acres

**ACTIVITY TYPE(S): (SELECT ALL THAT APPLY)**

<input type="checkbox"/> HOPE IV REVITALIZATION	<input checked="" type="checkbox"/> MIXED FINANCE DEVELOPMENT
<input type="checkbox"/> HOPE IV DEMOLITION GRANT	<input type="checkbox"/> REHABILITATION
<input checked="" type="checkbox"/> DEMOLITION	<input type="checkbox"/> DISPOSITION

(as of 6/30/07)	<u>0BR</u>	<u>1BR</u>	<u>2BR</u>	<u>3BR</u>	<u>4BR</u>	<u>5BR</u>	<u>TOTAL</u>
ALL UNITS	-0-	4	16	32	-0-	-0-	52
Occupied Units	-0-	3	16	31	-0-	-0-	50
Vacant Units	-0-	1	-0-	1	-0-	-0-	2

## **2      Introduction**

The Sarasota Housing Authority (SHA) has embarked on a public/private partnership with the Michaels Development and Interstate Realty Management Company to redevelop Janie Poe. Accomplished in a number of phases, all of the existing public housing units and community facilities at this site will be demolished and replaced with new dwelling units and related community facilities in a mixed income/mixed use community. All current residents of Janie Poe will be required to relocate to other housing prior to demolition and construction of each phase of the new community. Upon completion, the new community will consist of approximately 86 dwelling units, of which 76% will be affordable housing, some as income-tiered public housing units.

The purpose of this Relocation Plan is to establish the policies and procedures for vacating Janie Poe in a manner consistent with provisions of the Uniform Relocation Act (URA). These requirements include providing each resident with several formal notices, individual advisory services and counseling, comparable replacement housing and the payment of relocation related expenses. The Plan will also address preliminary requirements for re-occupancy of the newly developed community. These requirements will be addressed more specifically in the Admissions and Continued Occupancy Policy to be developed in conjunction with the current residents of Janie Poe.

Existing residents of Janie Poe will have many important choices and opportunities to consider as a part of the upcoming relocation process. These choices involve the type and location of replacement housing, when to move, the type of financial assistance available for moving related expenses, and the resident's preference for returning to the new community.

### **2.1      Summary of Uniform Relocation Act Requirements**

Because implementation of the revitalization involves demolition of all existing housing on the site and a relocation period in excess of one year, all eligible Janie Poe households will receive the relocation assistance required by URA. It is important to note that receiving moving assistance will not preclude a qualifying household from applying for occupancy in the newly redeveloped community. This plan will encourage all residents to consider returning to the new community. Residents will be given a preference in applying to return to the new community as shown in the Agreement on Re- occupancy which is part of this relocation plan.

This Relocation Plan addresses each of the five provisions of the Uniform Relocation Act (URA).

#### **2.1(a)      Notices**

The following notices will be provided to each Janie Poe household in compliance with the URA notification requirements for residents in developments scheduled for demolition.

- General Information Notice (mailed / delivered August 13, 2007)
- Notice of Eligibility for Relocation Assistance
- Ninety Day Notice
- Thirty Day Notice (if necessary)

A description of these notices appears in Section 7 of this Relocation Plan.

## **2.1(b) Advisory Services and Counseling**

Relocation advisory services shall include one or more personal interviews with each household. In implementing this requirement, relocation staff will survey each household to: 1) determine its needs and housing preferences; 2) explain relocation benefits and services, including eligibility requirements and procedures for obtaining benefits and services; 3) explain the relocation schedule; 4) advise on comparable replacement dwellings that may be available; 5) provide households considering Section 8 relocation with current lists of suitable rental housing located throughout the metropolitan area; and 6) provide transportation to view replacement housing, where needed.

In order to make the relocation process as convenient as possible for residents of Janie Poe the relocation staff will be housed on site at the ROSS Center. All relocation counseling, and supportive services counseling will occur at this onsite office, or in the resident's apartment. While the Section 8 intake process for the majority of residents will occur at the offices of SHA, reasonable accommodations will be considered to meet any special needs of on a case by case basis.

As part of the relocation counseling process, information will be provided in a variety of means and languages to meet the unique needs of the residents. Additionally, after-hours appointments will be afforded to residents who work or can not otherwise participate in meetings and counseling sessions.

## **2.1(c) Replacement Housing**

In general, the SHA must assist each household in identifying one to three comparable replacement dwelling units. Replacement housing will be provided on a non-discriminatory basis, in compliance with fair housing and other civil rights laws. To be comparable, a replacement dwelling must: 1) meet HUD Housing Quality Standards; 2) be functionally equivalent to the household's existing dwelling unit and have the appropriate number of bedrooms for the household; 3) be located in an area that is generally not less desirable than the current location; and 4) not increase the household's combined rent and utility costs following relocation.

A comparable replacement dwelling for a person receiving government housing assistance before the required relocation may reflect similar government housing assistance. Accordingly, the offer of another public housing unit is considered a comparable replacement dwelling unit for purposes of compliance with URA. Other publicly assisted housing (i.e. housing available for lease under the Section 8 Housing Voucher Program) is also considered a comparable unit for this purpose.

## **2.1(d) Relocation Benefits**

URA required relocation benefits include a rental assistance payment (under certain circumstances) and payment of moving and moving related expenses i.e. direct costs related to the move, such as moving expenses, application fees, etc.

Rental Assistance Payment: This payment may be required in order to not increase a household's share of the combined rent and utility costs following relocation. As it is believed that public housing and Section 8 replacement housing opportunities are available for all relocating Janie Poe households, and these programs limit a household's combined rent and utility payments to 30% of its adjusted income, Sarasota Housing Authority does not expect that this type of payment will be necessary. In other words, a resident's rent payment should not increase as a result of the relocation beyond that which is already required as a public housing program participant. If in the rare instance housing not exceeding the Total Tenant Payment is available, but a household with a rental voucher elects to lease a unit where the family's share of rent

exceeds the Total Tenant Payment, the family will be responsible for the difference between the voucher standard and the rent to owner.

Moving Expenses: All households eligible for relocation assistance will receive moving assistance. This assistance includes payment for actual moving costs and related relocation expenses, so long as those expenses are reasonable. Each eligible household may choose how to receive their moving assistance payment from the following alternatives: Alternative 1: Payment of Actual Moving Costs; and Alternative 2: Fixed Moving Allowance Option. How these alternatives are applied based on a household's relocation housing choice is discussed in Section 4, Relocation Benefits. In accordance with HUD Handbook 1378 3-2 (a) (1) which limits payment for the actual transportation of the residents belongings to 50 miles or less, payment for the actual moving costs (transportation of household goods) will be limited to moves within 50 miles of the current Janie Poe site.

Initial Security Deposit (applies only to Section 8 Voucher moves):

### **2.1(e) Appeals**

URA requires that this Relocation Plan include an opportunity of an appeal through the Housing Authority's usual grievance procedure. Disputes subject to appeal must include: 1) determination of eligibility for assistance; and 2) decisions about the nature, scope and amount of relocation assistance. Grievance information is included in Section 8 of this Plan.

### **2.2 Janie Poe – Facts**

Janie Poe (HUD Project Number: FL 008-05) is located at the intersection of Central Avenue and Martin Luther King Jr Way, between 25<sup>th</sup> & 22<sup>nd</sup> streets in Sarasota Florida and was constructed in 1971. Janie Poe currently contains 128 units in 12 buildings. To accomplish Phase I of the revitalization, 5 buildings containing 52 units, along with the ROSS center, will be demolished.

### **2.3 Reasons for Demolition**

The age and condition of the buildings in Janie Poe are documented as severely distressed. Demolition of Janie Poe is necessary due to substantial structural design and system deficiencies that are too costly to address in a rehabilitation program. Basic masonry structures show settlement cracks and other structural distress. Prolonged water damage has contributed to deteriorating exterior walls and interior moisture problems. Persistent mold and mildew make it impossible for paint to adhere. The reoccurring mold and mildew has become a constant struggle to avoid the increasing health risks associated with these circumstances. Deteriorated interior and exterior doorjambes and casings along with wood trim and stairway hardware are a source of lead-based paint above HUD action levels. Surveys have confirmed the presence of asbestos containing building materials which are in the declining stages of their life cycle. The structural design does not facilitate reconfiguration of interior layouts for the purpose of basic modernization and meeting Section 504 of the Rehabilitation Act of 1973 accessibility requirements. (i.e. door widths, no first floor bedrooms/bathrooms). After 35 years, little modernization and much deferred maintenance, critical building components and major systems can no longer be repaired or meet current code requirements. The multiple needs of this property are so great that it is not cost effective to maintain and improve the existing buildings.

## **2.4 Resident Participation in the Decision-Making Process**

Residents of Janie Poe have been involved in the current decision-making process over a 2-3 year period starting with the last unsuccessful HOPE VI application in 2004.

In developing this Relocation Plan, the SHA has and will continue to hold meetings and briefings as appropriate and necessary to reflect the needs and desires of the majority of the residents, in addition to meeting the requirements of the Uniform Relocation Act. These meetings focus on: 1) the proposed relocation schedule; 2) counseling and advisory services to assist households in making an informed choice of replacement housing, having fully considered the respective advantages and drawbacks of their respective options; 3) eligibility for relocation assistance; 4) moving and related assistance; 5) rights and responsibilities of households throughout the relocation process; and 6) return criteria for residents who wish to return to the site once the project is rebuilt.

This draft Relocation Plan will be distributed to each household on August 13, 2007 with a notice announcing subsequent Relocation meetings.

## **3 Eligibility for Relocation Assistance**

### **3.1 Residents Not Eligible for Relocation Assistance**

Generally speaking, existing households currently residing at Janie Poe will be eligible for relocation assistance under URA in conjunction with the Revitalization Project. However, there are important exceptions.

The following types of households will not be eligible for relocation assistance:

- a household evicted for serious or repeated violations of the terms and conditions of their lease;
- a household having no legal right to occupy the property under state or local law (e.g. squatter);
- a household occupying the property for the purpose of obtaining relocation assistance;
- a household moving into the property on after approval of the relocation plan (In this regard, SHA has placed a freeze on move-in's to the Phase I area as of July 18, 2007 and therefore no households are expected to fall into this category);

Following distribution of the Notice of Eligibility for Relocation Benefits, SHA will evaluate the cause for any eviction on a case by case basis to assure that eviction of the household would not have occurred “but for the project”, in which case the eviction would not preclude the eligibility to relocation assistance under URA. Evictions for drug related, rent non-payment and related lease violation causes do not meet the definition of a “but for the project” eviction.

### **3.2 Residents Eligible for Relocation Assistance**

This section specifies who is eligible for relocation benefits and advisory assistance and the types of assistance offered by SHA. It also defines households are eligible for services under the Authority's Community and Supportive Services Program and households eligible for relocation assistance related to re-

occupancy of the site when the new community is completed. Specifically, households will be eligible for relocation assistance according to the following time frames and classifications:

- a) Households that move between the date of the General Information Notice (anticipated August 13, 2007) and the approval date of this Relocation Plan.** All households in this category are eligible to participate in services under the Authority's Community and Supportive Services Program (CSSP). Eligibility for preference to return to the new community upon completion of construction, and eligibility for relocation benefits may be limited based on the move location and reason as follows:
- **Households that voluntarily leave the site during this period after obtaining a Section 8 voucher (unrelated to this Revitalization project) and successfully leasing a unit under the Section 8 program.** These households are eligible for: (1) CSSP services; and (2) payment of moving expenses where the Housing Authority did not undertake the move and pay for reasonable relocation expenses.
  - **Households transferred by the SHA to another public housing community for administrative reasons relating to a housing quality issue (i.e. health hazard, severely under-housed).** These households are eligible for: (1) CSSP services; (2) payment of moving expenses where the Housing Authority did not undertake the move and pay for reasonable relocation expenses; (3) preference to return to the new community; and (4) moving assistance related to re-occupancy.
- b) Households that moved voluntarily after the date of the General Information Notice (unless covered under "a" above).** These households are eligible to participate in services under the Community and Supportive Services Program (CSSP), and are eligible for preference to return to the new community upon completion of construction. Because these households were advised not to move before approval of the Relocation Plan, and chose to do so voluntarily, they will not be eligible for relocation assistance. SHA will provide relocation assistance related to re-occupancy for qualifying households. The SHA will make a good faith effort to locate these residents for purposes of offering community and supportive services and re-occupancy.
- c) Households having their lease terminated by the SHA at any time for good cause (unrelated to the project), or that vacate their units without proper notice for any reason.** These households will not be eligible for relocation services or benefits, and will have no preference or right of return to the new community. The SHA will make no effort to locate or track these residents and they will not be eligible to participate in the Community and Supportive Services Program.
- d) All other households (not falling into category a, b, or c above) that relocate after approval of this Relocation Plan.** These households are eligible to participate in services under the Community and Supportive Services Program (CSSP), and are eligible for preference to return to the new community (if they meet applicable eligibility criteria) upon completion of construction. These households will receive the full relocation benefit package, and relocation assistance related to re-occupancy (after meeting conditions of the lease).

Relocation benefits may be reduced by any amounts outstanding, provided that no deduction shall be made if it would prevent the displaced household from obtaining a comparable replacement dwelling as required by URA Section 24.204, nor may SHA withhold any part of a relocation payment to satisfy an obligation to any other creditor.

All personal possessions must be removed from the housing unit at the time of relocation, and the household head must complete the move-out process with the property manager before relocation benefits are paid,

except to the extent that the household head demonstrates the need for an advance payment in order to avoid or reduce a hardship, in which case SHA shall issue the minimum amount appropriate to address such hardship and accomplish the objective of the payment. The unit must be left in a broom swept condition free of any furniture, clothing, trash and food (including in stove or refrigerator) in accordance with the lease.

Each eligible Janie Poe household is entitled to only one (1) relocation benefit packet. The splitting of a household into more than one unit for relocation purposes will be permissible when two adult members of the household qualify under Authority guidelines. In such rare cases relocation benefits may be prorated accordingly and reasonably.

### **3.3 Relocation of Elderly Residents**

For senior households remaining on site as of the approval date of this Plan, relocation and supportive staff will discern any special needs of these households (such as proximity to medical and related services, additional packing assistance), as part of the relocation counseling process. The Authority shall endeavor to prioritize senior households for early phase relocation and will counsel residents to ensure their move meets all their social and geographic needs. It is anticipated that special assistance will be afforded senior households to ease with disturbance and attempt to achieve one relocation to the satisfaction of the resident.

### **3.4 Relocation of Existing On-Site Resident Business**

There are no resident businesses requiring special moving assistance or re-licensing related replacement housing modifications (i.e. licensed family day care homes) that currently operate out of public housing units on the site. Any existing resident business will be entitled to a Business Dislocation Allowance of \$50 for miscellaneous costs (for re-printing of business cards, stationery, etc.).

## **4 Comparable Replacement Housing - Choices and Resources**

The Uniform Relocation Act requires that all residents of Janie Poe will be provided with a comparable replacement dwelling unit. As indicated in Section 1.1 of this Relocation Plan, a comparable replacement dwelling for a household receiving government housing assistance before the required relocation may reflect similar government housing assistance. Therefore the available housing relocation resources during the relocation period include a range of assisted housing opportunities.

### **4.1 Potential Relocation and Re-occupancy Housing Choices**

The SHA has identified five types of housing resources for use by Janie Poe households during relocation and re-occupancy. These resources are as follows:

- Section 8 vouchers
- Other SHA public housing communities
- Other assisted housing opportunities, e.g. a project-based Section 8 property within 50 miles of Janie Poe
- New LIHTC communities — rental

**The type of rental housing opportunities that will be available in the redeveloped community is an important factor in making a relocation housing choice decision.**

Under certain circumstances, a household choosing Section 8 as a relocation resource may be eligible for preference to return to a public housing unit in the new community, if they have not been terminated from the Section 8 program during the relocation period and do not violate their Section 8 lease to exercise this choice (i.e. their lease term end date must coincide with the availability of a suitable public housing rental unit in the new community, and/or the landlord must agree to a mutual recession of lease (without penalty) to allow a household to return to a suitable public housing unit in the new community.

Type of Household	Relocation Housing Choice	Type of Housing Anticipated to be Available in New Community (Janie Poe Phase I)
Family	Public Housing	Public Housing Rental, Project-based Section 8 Rental (if any), Low-Income Housing Tax Credit Rental, Market Rental
Family	Section 8 Rental	Project-based Section 8 Rental (if any) w/ surrender of voucher, Low-Income Housing Tax Credit Rental, Market Rental, and in limited instances, Public Housing w/surrender of voucher.
Elderly	Public Housing	Public Housing Rental, Project-based Section 8 Rental (if any), Low-Income Housing Tax Credit Rental, Market Rental.
Elderly	Section 8 Rental	Project-based Section 8 Rental (if any) w/ surrender of voucher, Low-Income Housing Tax Credit Rental, Market Rental, and in limited instances, Public Housing w/surrender of voucher.

#### 4.2 Available Housing Resources for Relocation

Based on current public housing vacancy data, the number of off-line public housing units that will be coming back on-line after modernization, and the historical lease up success rate of Section 8 voucher holders, SHA anticipates that there will be adequate assisted housing opportunities for the successful relocation all of the current households in Janie Poe.

##### Analysis of Resources Available

The SHA has applied for 43 Section 8 relocation housing vouchers for households that will be relocated. Based on resident surveys conducted recently, approximately 86% of households have expressed a preference for Section 8 as a relocation housing choice.

Additionally, SHA anticipates that between normal turnover in its' public housing units and the normal attrition rate in the Section 8 voucher program, there will be sufficient resources to house all 50 existing families should it be unsuccessful in its application for Section 8 relocation vouchers.

Under either of these choices, a relocated household will have to pay no more than 30% of their qualifying household income for rent and utilities. Furthermore, if a household is unsuccessful, for any reason, in locating replacement housing under the Section 8 program, they can be relocated to another SHA public housing community.

### **4.3 Section 8 as a Relocation Housing Choice**

In order to assure that an adequate supply of private rental units accepting Section 8 vouchers will exist as a relocation resource, the Sarasota Authority's Assisted Housing Department will maintain a list of housing referrals through on-going contacts with landlords and property management companies. Staff will develop housing referral lists and make ongoing contacts with landlords. The addresses of eligible Section 8 units will be provided to Janie Poe households choosing Section 8 as a relocation housing preference.

- The Assisted Housing Department will employ several measures on an ongoing basis to increase landlord participation in the Section 8 program.

### **4.4 Section 8 Program as Part of the Relocation Program**

As part of the relocation counseling process, the relocation manager will make referrals of households with a Section 8 relocation preference to an SHA Section 8 counselor who will schedule the necessary application and orientation sessions. The following information describes the Section 8 process as it relates to the relocation process:

- Residents must attend required orientations during the S8 intake and voucher issuance process;
- Residents must look for housing within their designated price range (based on their income and fair market rent);
- If an owner is willing to rent a unit, the owner must complete a Request for Tenancy Approval (RFTA). Both the resident and the owner must sign the RFTA;
- After completing the RFTA the owner must return it to the Section 8 Counselor. Please remember to sign only one RFTA at a time;
- After your RFTA is received, it will be forwarded and assigned to a Section 8 Inspector;
- The SHA inspector will contact the owner to schedule an inspection of the unit to ensure that the unit meets Housing Quality Standards (HQS); and
- If the unit passes HQS, the owner will sign a Housing Assistance Payment (HAP) Contract with the SHA, and the resident will sign a lease with the owner.

Residents issued Section 8 vouchers will be given 60 days to locate an apartment and enter into a RFTA. If additional time is needed, up to two 30-day extensions will be possible. Any extensions after that will be considered on a case to case basis by SHA for reasonable accommodations for persons with disabilities.

Those residents who have not found Section 8 housing before the end of the 90-day relocation period will be moved into another public housing unit while they continue to search for a suitable Section 8 unit. These residents will be able to keep their Section 8 vouchers for two 30-day extensions after the initial 60-day period. The SHA will pay the moving costs and re-installation charges for initial move into public housing and also pay the moving costs, and re-installation charges and security deposits that are required to move into a Section 8 apartment.

#### **4.5 Housing for Disabled Persons**

The SHA will assure that replacement housing opportunities are available for households that contain disabled residents having special housing requirements. SHA routinely addresses such needs by making modifications to public housing units necessary to assure accessibility, and by required relocation of non-disabled residents occupying accessible units. SHA will also work with private landlords to identify accessible units in the private assisted housing market. A disabled person is one who has physical or mental impairment that substantially limits one or more major life activities. A record of such an impairment or being regarded as having such an impairment must be documented in the resident file.

The newly developed Janie Poe community will include the appropriate number of housing units to meet the needs of disabled households of various types, as required by law.

#### **4.6 Urgent Need Housing**

A household may be required to move into a new housing unit in less than 90 days if there is an urgent need, such as a threat to health and safety. The SHA will have the final say in determining whether or not a case is an urgent need. In that case, the determination of urgency must be included in the case file.

### **5 Relocation Benefits**

As a part of the planned redevelopment, every household in Janie Poe will need to move at least once and possibly twice. Some households will not want or be able to return to the redeveloped community after the construction is completed. The remaining households will move off-site while waiting to re-occupy a housing unit in the new community (if they meet eligibility criteria). Regardless of a household's preference to return to the new community, this Relocation Plan provides a relocation benefit package for all households based on the standards for a move of at least 12 months. All relocating households will have two alternatives for payment for moving/moving related expenses; however, there is a slight difference in these alternatives depending on whether a Janie Poe household chooses relocation to another public housing unit or to a Section 8 assisted rental unit.

#### **5.1 Moves to Another SHA Public Housing Unit**

Janie Poe households moving to a unit in another SHA public housing community will have the following options for payment of moving and moving related expenses. Alternative 1 provides for payment of actual costs, and Alternative 2 provides for a lump sum payment from the federal schedule contained in Appendix II to this Plan.

Under Alternative 1, the "payment of actual costs option", SHA will be responsible for payment of actual/reasonable moving and moving related costs. This payment includes expenses for: 1) transportation to the replacement dwelling; 2) the services of a SHA contracted professional moving company to move and unload furniture and belongings (including household owned appliances; 3) utility hook-up fees, including reinstallation of telephone and cable service (where such service existed at the time of move); and 4) other related and reasonable expenses, if any. Households that choose Alternative 1 will be entitled to a dislocation allowance of \$50 (in accordance with HUD Handbook 1378 3-2 (c)) after the move is completed. With respect to item 2 regarding the services of SHA's contracted moving company, a household choosing the payment of actual costs option may select a responsible moving company of their own choice provided that the cost does not exceed the schedule amount for SHA's mover. In such instances, SHA will pay the household's selected mover after the move has been completed to the satisfaction of the head of household

and the household head provides SHA written certification of such satisfactory completion (in no instance shall SHA be liable for any damages or claims to the household's property arising from the household's selection of its own moving company).

Under Alternative 2, the "fixed allowance option", eligible households may choose to receive a fixed lump sum payment for moving/moving related expenses as an alternative to payment of the actual costs under Alternative 1. This lump sum payment is from the federal "Moving Expense and Dislocation Allowance Schedule" which is contained in Appendix II to this Plan. **IN CHOOSING THE "FIXED PAYMENT OPTION", THE HOUSEHOLD ELECTS TO MOVE THEMSELVES AND MAY INCUR EXPENSES BEYOND THE FIXED AMOUNT THAT WILL NOT BE REIMBURSED BY THE SARASOTA HOUSING AUTHORITY.** Such fixed amount will not be paid in advance, which means that residents choosing this option must be able to pay all related expenses from their own funds in advance of receiving payment by SHA (unless the household demonstrates the need for an advance relocation payment in order to avoid or reduce a hardship, in which case SHA shall consider the minimum amount appropriate to address such hardship and accomplish the objective of the payment). **FOR THIS AND OTHER REASONS, THE SARASOTA HOUSING AUTHORITY DOES NOT RECOMMEND THIS OPTION TO ANY HOUSEHOLD.** If a family elects Alternative 2, the "fixed allowance option," SHA must first certify to the fact that the family has completely vacated their Janie Poe phase one public housing unit prior to the family receiving payment of the fixed allowance option.

## 5.2 Moves to a Section 8 or Other Assisted Housing Unit

Janie Poe households choosing to move to a Section 8 or Other Assisted Housing program (non SHA public housing) will have two options for payment of moving and moving related expenses. Alternative 1 provides for payment of actual costs, and Alternative 2 provides for a lump sum payment from the federal schedule (Appendix II).

Under Alternative 1, the "payment of actual costs option", SHA will be responsible for payment of actual/reasonable moving and moving related costs. This payment includes expenses for: 1) transportation to the replacement dwelling; 2) the services of a SHA contracted professional moving company to move and unload furniture and belongings (including household owned appliances); 3) utility hook-up fees, including reinstallation of telephone and cable service (where such service existed at the time of move); and 4) other related and reasonable expenses, if any. (No dislocation allowance is provided under this alternative, and households will have their public housing deposit refunded less any outstanding balances due to SHA.)

With respect to item 2 regarding the services of SHA's contracted moving company, a household choosing the payment of actual costs option may select a responsible moving company of their own choice provided that the cost does not exceed the schedule amount for SHA's mover. In such instances, SHA will pay the household's selected mover after the move has been completed to the satisfaction of the head of household and the household head provides SHA written certification of such satisfactory completion (in no instance shall SHA be liable for any damages or claims to the household's property arising from the household's selection of its own moving company).

Under Alternative 2, the "fixed allowance option", eligible households may choose to receive a fixed lump sum payment for moving/moving related expenses as an alternative to payment of the actual costs under Alternative 1. This lump sum payment is from the federal "Moving Expense and Dislocation Allowance Schedule" which is contained in Appendix II to this Plan. **IN CHOOSING THE "FIXED PAYMENT OPTION", THE HOUSEHOLD MAY INCUR EXPENSES BEYOND THE FIXED AMOUNT THAT WILL NOT BE REIMBURSED BY THE SARASOTA HOUSING AUTHORITY.** Such fixed amount will not be paid in advance, which means that residents choosing this option must be able to pay all

**related expenses from their own funds in advance of receiving payment by SHA (unless the household demonstrates the need for an advance relocation payment in order to avoid or reduce a hardship, in which case SHA shall consider the minimum amount appropriate to address such hardship and accomplish the objective of the payment). FOR THIS AND OTHER REASONS, THE SARASOTA HOUSING AUTHORITY DOES NOT RECOMMEND THIS OPTION TO ANY HOUSEHOLD.**

**Rental Security Deposit:** Regardless of the moving/moving related expense alternative chosen, a security deposit (if required and in an amount not to exceed one month's contract rent) will be paid on behalf of households choosing to relocate to a Section 8 assisted replacement housing unit.

### **5.3 SHA Contracted Professional Moving Company**

For all households choosing Alternative 1 (the payment of actual costs option), the SHA will directly pay for the services of a designated moving company procured by the SHA (or a household selected mover consistent with the provisions of Section 4.2 of this Plan). The SHA will require that the designated moving company maintain insurance coverage to cover the cost of any damage to or loss of a household's possessions caused by the moving company. Households will be responsible to work with the relocation staff to schedule the move date and time, and be ready to move at that time.

Since most households prefer to pack their own personal possessions and items of value, the SHA will provide boxes and related packing materials that each household may obtain, at no cost, from the Relocation Manager. Any households needing assistance in packing loose items should contact the Relocation Manager who will direct the moving company as necessary.

### **5.4 Payment for Utility Fees & Deposits (Moving Related Costs)**

All households that choose Alternative 2 (Fixed Allowance Payment for moving/moving related costs) will pay for utility fees and deposit costs directly as part of their fixed allowance amount. The fixed allowance amount will not be paid to the household until the household has satisfactorily vacated their unit and SHA receives documented evidence that the household has paid the respective fees/deposit costs (unless the household demonstrates the need for an advance relocation payment in order to avoid or reduce a hardship, in which case SHA shall consider the minimum amount appropriate to address such hardship and accomplish the objective of the payment).

For all households that choose Alternative 1 (Payment of Actual Costs), the SHA will pay the cost of connection and/or re-installation fees for power, gas and electric utility services. These fees will be paid directly to the service provider unless the household provides evidence of prior payment therefore. Re-installation fees for telephone and cable service will be paid only if the household had prior, current service at its Janie Poe unit (reimbursement of these fees will be paid only to the individual whose name appears on the service bill).

With respect to power, gas and electric utility services, if a deposit is required (rather than, or in addition to, a re-installation fee) due to poor payment history of the household, SHA will pay the deposit to the service provider. Any utility deposit paid under this condition will be considered a loan and the head of household will sign a promissory note for any amount in excess of the normal re-installation fee. However, if a utility deposit fee is required because the household did not previously have that type of utility service (i.e. for water bills), SHA will pay the deposit to the utility company, with no repayment required.

The relocation staff will assist residents in assembling the required documentation for payment of utility related relocation expenses.

## **5.5 Payment for Rent Deposits**

The Uniform Relocation Act and HUD regulations do not require that Sarasota Housing Authority pay a security deposit for a household choosing Section 8 as a relocation housing preference. However, the SHA views the security deposit requirement by most private landlords to be a potentially significant impediment to the ability of households in Janie Poe to successfully access Section 8 as a replacement housing resource.

In order to promote the widest possible range of replacement housing choice to relocating residents, SHA has chosen to include payment of a security deposit, in an amount equal to or less than one month's contract rent, as part of the relocation benefit package. Once the unit is approved, Section 8 staff will forward lease approval paperwork to the Relocation Manager who will requisition the deposit amount. The deposit will be mailed directly to the landlord, unless the household has pre-paid the deposit and provides timely and acceptable evidence of such to the Relocation Manager.

## **5.6 Notice to Vacate**

At least thirty (30) days before the scheduled move date, all relocating households must complete the "Notice of Intent to Vacate" Form with the property manager. This notice establishes the official vacate date and notifies the resident that all items must be removed from their Janie Poe unit, and their key returned to the property manager, within 72 hours of the official vacate date. Any items remaining in the unit after this time becomes the property of SHA and SHA will not be responsible to the resident therefore. After the 72 hour period has expired, SHA will enter the apartment to remove SHA owned appliances and any remaining items, and board up the unit.

Public Housing rent deposits (from residents relocated into the Section 8 program) will be refunded (within 45 days of move-out) to the resident less any charges after final move-out inspections. For residents transferring to another public housing unit, deposits will be transferred to the new unit.

## **5.7 Estimated Moving Related Costs**

The estimated moving and moving related expense paid to all parties (the household head, moving company, utility companies, administrative, etc) is projected in the detailed relocation budget found in APPENDIX III.

## **6 Eligibility for Returning to the New Development**

Households remaining in good standing with no lease agreement violations during the relocation period will be offered an opportunity to return to the redeveloped Janie Poe area based on the eligibility criteria outlined in this Section, and the relocation housing choices made in relation to the type and amount of new replacement housing being developed on the site.

Should the number of eligible households desiring to return exceed the number of available new units after redevelopment, preference for return will be based on a ranking system within the New Admissions Policy which includes threshold eligibility criteria, screening and other re-occupancy criteria and the waiting list organization/preference system. This policy is reflected in the Re-occupancy Agreement to be finalized with the Resident Council and will be formalized into the Admissions and Continued Occupancy Plan (also to be developed with resident consultation).

## **6.1 New Admission Policy**

A new admission policy will be developed giving preference to otherwise eligible households participating in self sufficiency activities under the Community and Supportive Services Program and working families (unless exempt from such requirements by virtue of age and/or disability status). The new admission policy will be developed in consultation with the HASC, the Resident Council and from resident input received at noticed meetings. Janie Poe Associates, LLC and its management agent, Interstate Realty Management Company will have the final say in determining eligibility and admission criteria for property it develops and owns. Eligible residents may expect to be offered the opportunity to apply for re-occupancy to the new community beginning in approximately 2009.

## **6.2 Households in Good Standing**

All applicants moving into the new community will be required to meet certain threshold eligibility criteria in order to be selected for admission:

- a. Household must meet statutory eligibility requirements for public housing or Section 8 admission;
- b. Household must be in good standing, including:
  - no outstanding balance owed to SHA under the public housing or Section 8 programs;
  - no eviction for cause from a public housing or Section 8 unit during the relocation period;
  - no violations by any household member or guest under SHA's One Strike Policy;
  - no substantiated complaints regarding behavior of household members during the relocation period;
  - satisfactory record of maintaining leased premises during the relocation period.
- c. Household must meet screening criteria.

Only those households in good standing as defined above and willing to agree to the new lease requirements will be eligible to move into the redeveloped community. Households that are not currently in good standing, do not remain in good standing or not willing to agree to the new lease terms will not be eligible for tenancy at the newly developed Janie Poe area.

## **6.3 Other Re-occupancy Criteria**

Households that meet the threshold eligibility criteria will be screened before placed selected for admission. Screening criteria will include:

- a. Prior landlord history, including rent payment history and compliance with other lease obligations during relocation period;
- b. Past performance in meeting other financial obligations during relocation period, including, but not limited to;
  - payment history for utility charges
  - no history or pattern of substantial past due consumer debt (excluding medical), which is considered to be past due when payment history reflects two instances of over ninety (90) days or more past due or one instance of over one hundred twenty (120) days past due.

- c. Criminal background check for all family members that shows:
  - i. No history of felony conviction in the past ten years involving violence to a person; or
  - ii. In the past five years, no history of arrest or conviction involving drug activity, violence to a person, theft, illegal use or possession of a weapon, or damage to property; or, in the past ten years, any pattern of such activity.
- d. No household member is registered as a sex offender;
- e. Declaration from household head that no household member under 18 has been convicted of a crime classifying them as an adult;
- f. Satisfactory home visit that evidences an acceptable living standard (on 48 hours notice);

In addition to the threshold eligibility and screening criteria, the following re-occupancy criteria apply to all applicants:

- a. New members of the household who are placed on the lease after the initial relocation will be subjected to all screening requirements. In the event the new member of the household is determined ineligible, the entire household will be determined ineligible unless the ineligible applicant is excluded from the household.
- b. Households MUST meet the income targeting requirements to be established for purposes of providing a mixed income community.
- c. Households MUST have the appropriate unit size by bedroom count, if available, based on family composition at the time of return. The U.S. Department of Housing and Urban Development's eligibility guidelines to determine appropriate bedroom count include:
  - Generally, two persons per bedroom;
  - Persons of different generations, persons of the opposite sex (other than a spouse), and unrelated adult adults should have separate bedrooms;
  - Husband and wife share the same bedroom;
  - Up to two children of same sex share a bedroom;
  - Children, with the possible exception of infants children three years of age or younger, should not share a bedroom with parents;
  - Children of different sexes and older than three years of age will have separate bedrooms; and;
  - Live-in attendants who are not family members may have their own bedroom a family or individual must have medical verification to have a live-in attendant.

The standards for determining bedroom count required to adequately accommodate a household (without under or over housing) are as follows:

Number of Persons Allowed per Unit		
# of Bedrooms	Minimum Occupants	Maximum Occupants
1	1	2
2	2	4
3	3	6
4	6	8
5	7	10

#### 6.4 Selection Process

If more households apply, and meet respective eligibility criteria, to return to the new community than the available number of low income housing opportunities (by size, type and income tier), the selection process will employ a preference system that prioritizes households for re-occupancy according to the following criteria.

All applicants will be divided in three groups:

**Group 1 Applicant:** Resided at **Janie Poe** on or after the General Information Notice.

**Group 2 Applicant:** Resided at **Janie Poe** on or after the start of relocation.

**Group 3 Applicant:** All Other Applicants

Applicants will be awarded preference points based on their Group Number, Full Time vs. Part Time participation in a Work and/or Self Sufficiency Program Activity, and duration of activity in a Work and/or Self Sufficiency Program Activity as identified in the rating system below. Elderly and/or disabled applicants will be awarded the maximum number of points available for their respective group status. Within the waiting list for each income tier by unit size, eligible applicants with the highest number of points will receive a unit assignment before applicants with a lower number of points. The tiebreaker for applicants with the same number of preference points within an income tier and unit size class will be Length of Residency at Janie Poe for Group 1 and Group 2 applicants and Time and Date of Application for Group 3 applicants.

#### Employed 35+ Hours Per Week or Full Time Participation in Work/Education & Job Training/CSS-FSS Activity (unless Exempt) for Duration of:

	<b>Group 1 Multiplier</b>	<b>Group 2 Multiplier</b>	<b>Group 3 Multiplier</b>
18 + months	60	40	20
12 – 18 months	51	34	17
06 -12 months	45	30	15
less than 6 months	30	20	10

**Employed 20-35 Hours Per Week or Full Time Participation in Work/Education & Job Training/CSS-FSS Activity (unless Exempt) for Duration of:**

18 + months	45	30	15
12 – 18 months	39	26	13
06 -12 months	30	20	10
less than 6 months	21	14	7

Note: Exempt means seniors or persons with a disability that precludes work activity participation. Exempt person receives maximum points available within respective group.

All Non-exempt adults must participate in the CSS Program/employment/job training activity for a minimum of 20 hours per week as a condition of residency.

**7 Record Keeping**

The SHA will maintain records of each household, as required by law, for a period of at least four (4) years after the development of the community has been completed or the date required by the applicable program regulation, whichever is longer.

A relocation tracking system will be developed to locate residents during and after relocation and throughout the reconstruction phases. The SHA will keep evidence verifying that all residents have been provided with timely written notices regarding the following items: Relocation Plan, General Information Notices, Ninety Day Notice, Notice to Vacate, and other pertinent notices pertaining to the redevelopment process. The tracking system will contain records for each household that includes, but shall not be limited to, the following information:

- Name and address
- Social Security Number
- Language spoken
- Required bedroom count
- Family composition
- Special needs (disability, special physical improvements)
- Record of units offered, date and location
- Section 8 Certification
- Current rent
- An income source
- A new unit address
- Copies of claims for moving and related expenses
- Any and all other information in sufficient detail to be in compliance with all HUD applicable relocation policies and regulations as outlined in Chapter 6 of the HUD relocation handbook

**8 General Information and Timely Notices**

The SHA will send out notices, by mail, approximately every six (6) months, at a minimum, updating the residents on the demolition and reconstruction of the development. Notices will be bilingual where

appropriate. All mailings will remind residents to notify the SHA of any address changes. **It is the resident's responsibility to inform the SHA of any change of address.**

At specific times before and during the relocation process, formal notifications will be sent to residents as required by the Uniform Relocation Act. The notices include: General Information Notices, Notice of Eligibility for Relocation Assistance, and Ninety-Day Notice to Move.

### **General Information Notice**

The residents of Janie Poe will receive a General Information Notice providing updated information on the redevelopment process. This is not a notice to move. This notice will be distributed to all residents. This notice will:

- Explain the nature of the redevelopment
- Describe the general relocation assistance available
- Explain the proposed timetable for relocation
- Note that comparable replacement housing will be provided
- Advise residents not to move without notice and consultation from the Relocation and CSS staff.

### **Notice of Eligibility for Relocation Assistance**

The residents will receive a Notice of Eligibility for Relocation Assistance informing them that they are eligible for relocation benefits. A family or individual may begin to relocate after receiving this notice and in consultation with the Relocation Manager. This notice will:

- Explain that a representative of SHA will contact the household to determine their replacement housing needs and preferences;
- Identify specific relocation services and benefits to which the household is entitled and the household's rights and obligations in the process;
- Identify when the household will receive the services and benefits;
- Any procedures that must be followed to obtain them;
- Advise households not to move without appropriate counseling and consultation with the relocation staff.
- This notice may be combined with the Ninety Day Notice.

### **Ninety Day Notice**

The notice provides written notice of the earliest date the household will be required to move (except for urgent need conditions). The household may choose to relocate before the 90-day period has expired. Households relocating under the Section 8 Program will need to move into their new housing Unit as required by the lease agreement they are entering into. If a specific move date is not identified in this notice, the household will receive a 30 day notice.

## **9 Sarasota Housing Authority Grievance Procedures**

Any Janie Poe household, which has an individual complaint with respect to the implementation of the relocation policies and procedures, may file a written grievance stating the grounds for their complaint. The SHA will fully review the complaint and seek to resolve it. The SHA will provide a written response

detailing its findings and any proposed resolution. All households who are, or claim to be, permanently displaced, may seek further review of the SHA's decision under the terms of the Uniform Relocation Act at the HUD Miami Field Office, Office of Public Housing, 909 SE First Avenue, Room 500, Miami, Florida, 33131-3028 or in court. A copy of the SHA's Grievance Procedures will be available at the on-site Relocation office.

**10 Discrimination Policy**

The SHA acts, and will continue to act, without discrimination on the basis of race, color, religion, national origin, immigration status, disability, age, sex, sexual orientation, marital status, presence of children, sources of income, or military service in all matters that pertain to the SHA's Relocation Plan.

**11 Phasing Plan**

In order to accommodate the redevelopment plan and provide for timely and efficient coordination of lead paint and asbestos abatement activities prior to demolition, it will be necessary to demolish all 52 public housing units contained in the Phase I at once. However, special consideration will be given to senior residents, households with documented urgent needs and families who complete supportive services and relocation workshops and counseling sessions.

## THE MOVING PROCESS

### KNOW YOUR RIGHTS AND RESPONSIBILITIES

Dear Janie Poe Resident:

The upcoming redevelopment planned for the Janie Poe public housing community requires that you and your neighbors must move. You will have many important choices and opportunities resulting from the redevelopment program. You should carefully and thoroughly consider all your relocation options before making a selection and know your rights and responsibilities.

#### **Your Rights**

1. To have the SHA provide you with a choice of relocation assistance and benefits which will provide you with decent, safe and affordable housing as you move from Janie Poe to a replacement housing unit. The attached chart details housing resources and choices with the three households' classifications.
2. To have the SHA cover all eligible moving-related expenses associated with the relocation including actual moving cost and utility reconnections, and to provide moving assistance to those in need.
3. To have the SHA or its agent provide moving boxes and related packing materials as needed to assist you in packing personal items should you prefer to perform some packing yourself.
4. To have the SHA provide sufficient notice of your move date.
5. To have the SHA conduct a fair and open process in full accordance with the policies and procedures detailed in the SHA Janie Poe Relocation Plan.
6. To have an avenue within the SHA to aggrieve any individual complaints.

#### **Your Responsibilities**

1. To specify your replacement housing preference and work with your relocation counselor to identify the replacement housing unit that best meets your needs and is affordable to you.
2. To move upon notice during the specific time period irrespective of any pending grievance related to relocation or continuing occupancy. However, such a move, provided notice is filed before the move, will not waive your rights to a grievance.
3. To advise the relocation manager whether you want or need packing assistance.
4. To arrange with utilities to have your services transferred to your new housing unit, and to cover all associated arrearage.
5. To notify the post office, welfare, social security, and other agencies, individuals, companies, and related entities of your change in address.
6. To be ready to move all your belongings on the specified date, and to be home and ready to move when the movers arrive. As an example, the mover should not have to clean house, move dirty dishes, remove bed linens, etc. in order to move your furniture.
7. To return usable moving boxes to the SHA for potential reuse or recycling.

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**ELIGIBILITY CHART FOR RELOCATION ASSISTANCE**

Janie Poe Relocation Plan

	Eligible for Relocation Assistance?	Eligible for Community & Supportive Services Program?	Eligible for Re-occupancy Assistance?
I. HOUSEHOLD EVICTED OR UNDER EVICTION FOR CAUSE NOT RELATED TO THE REVITALIZATION PROJECT OR THAT SKIPS TO AVOID A RENT OR OTHER LEASE OBLIGATION	NO	NO	NO
II. OTHER HOUSEHOLD BY TYPE:			
a. Janie Poe household moving out prior to date of the General Information Notice (August 13, 2007)	NO	NO	NO
b. Janie Poe households relocating to Section 8 between date of the General Information Notices and approval of Relocation Plan	YES <i>(Limited)</i>	YES	YES
c. Janie Poe households transferred by SHA between date of General Information Notice and approval of Relocation Plan (HQS, Medical, Security, or other urgent reason)	YES	YES	YES
d. Janie Poe households relocating after approval of Relocation Plan	YES	YES	YES

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**ALTERNATIVE I - Direct Cost Reimbursement Option**

**TYPE OF RELOCATION ASSISTANCE BY RELOCATON HOUSING CHOICE**

DIRECT COST PAYMENT OPTION	Move to Another SHA Public Housing Unit	Move to Section 8 or Other Non-SHA Assisted Housing
<b>I. Transportation Costs</b>		
A. SHA Contract Moving Co. (or tenant selected mover per Section 5.2 of this Plan)	SHA receives invoice & pays moving company directly.	SHA receives invoice & pays moving company directly.
<b>II. Utility Charges (subject to demonstrated need for advance payment per Section 5.4 of this plan.)</b>		
A. Electric/Gas Transfer Fee	Resident receives invoice showing fee amount from utility company and provides copy to SHA. SHA pays utility company directly, or reimburses resident (with proof that fee has been paid by resident).	Resident receives invoice showing fee amount from utility company and provides copy to SHA. SHA pays utility company directly, or reimburses resident (with proof that fee has been paid by resident).
B. Electric/Gas Deposit (If Required Due to no Prior Service)	Resident receives invoice showing fee amount from utility company and provides copy to SHA. SHA pays utility company directly, or reimburses resident (with proof that deposit has been paid by resident).	Resident receives invoice showing fee amount from utility company and provides copy to SHA. SHA pays utility company directly, or reimburses resident (with proof that deposit has been paid by resident).
C. Electric/Gas Deposit (If Required Due to Poor Payment History)	Same II-B but resident must repay SHA (Loan Only).	Same II-B but resident must repay SHA (Loan Only).
D. Telephone/Cable Re-Install (Only if Previous Service at Janie Poe)	Resident receives invoice and pays service provider. Resident provides copy of invoice to SHA (with documentation of prior service) and SHA reimburses resident.	Resident receives invoice and pays service provider. Resident provides copy of invoice to SHA (with documentation of prior service) and SHA reimburses resident.
E. Water/Sewer Deposit (if Required)	Not Applicable	Resident receives invoice showing fee amount from utility company and provides copy to SHA. SHA pays utility company directly, or reimburses resident (with proof that deposit has been paid by resident).
F. Past Due or Current Balances Owed to Any Utility Company	Resident Responsibility (Not Eligible Relocation Expense).	Resident Responsibility (Not Eligible Relocation Expense).
<b>III Rental Charges</b>		
A. Security Deposit (If Required, in Amount up to One Month Contract Rent)	Not Applicable	SHA will pay directly to landlord named on Request for Tenancy Approval after the unit passes HQS inspection and lease agreement is signed.
.B. Misc. Fees: Application, Credit Report	Not Applicable	Resident receives invoice showing fee amount from rental agent and provides copy to SHA. SHA pays rental agent directly, or reimburses resident (with proof that fee has been paid by resident).
<b>IV Dislocation Allowance</b>	Allowance of \$50 paid to resident by SHA after the move has been completed	Not applicable (Public Housing Deposit returned less any adjustment for amounts owed, within 45 days).

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ALTERNATIVE II – Fixed Moving Allowance Option

TYPE OF RELOCATION ASSISTANCE BY RELOCATION HOUSING CHOICE

<b>FIXED MOVING ALLOWANCE OPTION</b> (subject to demonstrated need for advance payment per Section 4.4 of this Plan)	<b>Move to Another SHA Public Housing Unit</b>	<b>Move to Section 8 or Other Non-SHA Assisted Housing</b>
<b>I. TRANSPORTATION COSTS</b>		
A. Resident Undertakes Move Themselves	Resident responsible to pay. Cost reimbursed as part of Fixed Schedule.	Resident responsible to pay. Cost reimbursed as part of Fixed Schedule.
<b>II. UTILITY CHARGES</b>		
A. Electric/Gas Transfer Fee	Resident responsible to pay. Cost reimbursed as part of Fixed Allowance Schedule. Resident must document to SHA that this fee has been paid prior to receiving the Allowance payment.	Resident responsible to pay. Cost reimbursed as part of Fixed Allowance Schedule. Resident must document to SHA that this fee has been paid prior to receiving the Allowance payment.
B. Electric/Gas Deposit (If Required Due to no Prior Service)	Resident responsible to pay. Cost reimbursed as part of Fixed Allowance Schedule. Resident must document to SHA that this fee has been paid prior to receiving the Allowance payment.	Resident responsible to pay. Cost reimbursed as part of Fixed Allowance Schedule. Resident must document to SHA that this fee has been paid prior to receiving the Allowance payment.
C. Electric/Gas Deposit (If Required Due to Poor Payment History)	Resident responsible to pay (no loan provided).	Resident responsible to pay (no loan provided).
D. Telephone/Cable Re-Install (Only if Previous Service at RVT)	Resident responsible to pay. Cost reimbursed as part of Fixed Allowance Schedule. Resident must document to SHA that this fee has been paid prior to receiving the Allowance payment .	Resident responsible to pay. Cost reimbursed as part of Fixed Allowance Schedule. Resident must document to SHA that this fee has been paid prior to receiving the Allowance payment.
E. Water/Sewer Deposit (if Required)	Not Applicable.	Resident responsible to pay. Cost reimbursed as part of Fixed Allowance Schedule. Resident must document to SHA that this fee has been paid prior to receiving the Allowance payment.
F. Past Due or Current Balances Owed to Any Utility Company	Resident Responsibility (Not an Eligible Relocation Expense).	Resident Responsibility (Not an Eligible Relocation Expense).
<b>III. RENTAL CHARGES</b>		
A. Security Deposit (If Required, in Amount up to One Month Contract Rent)	Not Applicable	SHA will pay directly to landlord named on Request for Tenancy Approval after the unit passes HQS inspection and lease agreement is signed.
B. Misc. Fees: Application, Credit Report	Not Applicable	Resident responsible to pay. Cost reimbursed as part of Fixed Allowance Schedule. Resident must document to SHA that this fee has been paid prior to receiving the Allowance payment.
<b>IV. DISLOCATION ALLOWANCE:</b>	Part of Fixed Allowance Schedule payment. . •	Not Applicable (Public Housing Deposit returned less any adjustments or amount owed within 45 days).

**TENTITIVE AGREEMENT ON RE-OCCUPANCY AND ADMISSIONS  
REQUIREMENTS FOR RELOCATING RESIDENTS OF JANIE POE**

**RECITALS**

1. The Sarasota Housing Authority is in the process of developing a plan for the demolition and redevelopment of Janie Poe. Whereas no final approved plan exists as of the date of this relocation plan the Authority desires to effect the relocation and eventual demolition of the site while at the same time working on development of a revitalization plan for the Janie Poe site. Whereas no definitive funding sources have yet been approved the expectation is that there will be a variety of funding sources including Tax-exempt Bond Debt, LIHTC Equity and others. Where as no definitive number of replacement housing units has been identified, the Authority believes the site would lend itself to a development plan consisting of approximately 247 total units (168 rental housing and 79 for-sale housing) and that there will be an affordable component (public housing) to the new rent housing equal to not less than 30% of the total rental units developed on the 12.86 acres, with the remaining units as market rate and/or tax-credit units. Depending on availability of other and adjacent land, site acquisitions may make it possible to spread the affordable housing over a larger area than the current 12.86 acres should the Authority so elect.
2. All existing dwelling units at Janie Poe will be demolished as part of the redevelopment effort. Before demolition activity commences, all residents will be relocated from each Phase of the site. Consistent with HUD standards, all relocation efforts will meet or exceed requirements under the Uniform Relocation Act. A relocation plan must be submitted to HUD for review and approval prior to the commencement of relocation. Consistent with practice and in the best interest of the residents, the Authority has decided that this relocation plan should include the basic elements of the re-occupancy criteria for the new development which former residents will be required to meet in order to return to the new site if they choose to do so.
3. The Housing Authority after preparing this relocation plan in draft form will meet with the resident leadership at Janie Poe to first give them the opportunity to read and provide input into the draft plan. Thereafter the Authority shall provide copies of the resident council approved draft relocation plan to residents of Janie Poe and afford them with a reasonable time period for which to comment on the plan. Thereafter the final plan will be submitted to HUD for approval.
4. After HUD approval of the relocation plan a copy shall be provided to every household at Janie Poe, meetings will be scheduled to review the plan and answer any questions, then one-on-one relocation counseling will commence with the families of Janie Poe to ensure proper understanding and to answer any questions they may have prior to relocation.
5. It is the Authority's express intention to incorporate the following re-occupancy and admissions standards into the Admissions and Occupancy Policy for the new development (s) developed as part of the 12+ acre Janie Poe redevelopment. This agreement will be signed by the SHA and the Resident Council at Janie Poe as evidence of respective pledges to ensure to the greatest

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extent feasible that residents will be permitted fair and ample opportunity to apply and be approved for readmission to the new community should they (the resident) wish to return.

6. The Authority shall provide routine customary notices, as part of the community and supportive services program case management activities, to former residents of Janie Poe advising them of the status of their continuing eligibility for preference in returning to the newly developed community. Such notices shall be not less than bi-annual and shall advise of any outstanding issues which may negatively impact their preference toward rights to return under the relocation plan and admissions and continued occupancy plan.

### APPLICANT SELECTION CRITERIA

In recognition of the foregoing recitals (Paragraphs 1 through 6), the Housing Authority and Resident Council hereby agree to the following re-occupancy requirements for the redevelopment of the Central Park Village community.

1. All applicants for admission to the new community must meet minimum threshold eligibility criteria in order to be eligible to return to the redeveloped property:
  - a. Household must meet statutory eligibility requirements for public housing admission;
  - b. Household must be in good standing as defined by the following:
    - i. i. has no outstanding balance owed to SHA under the public housing or Section 8 programs;
    - ii. ii. has not been evicted for cause during the relocation period;
    - iii. iii. has no violations under SHA's One Strike Policy during the relocation period;
    - iv. iv. has no substantiated complaints regarding behavior during the relocation period;
    - v. v. has a satisfactory record of maintaining its unit during the relocation period;

***“Relocation Period for this purpose is defined as the period of time from when the family first relocates out of Janie Poe up to the date when the resident makes application to return to the new site.”***

- c. Unless exempt by virtue of age and/or disability status, all adult members of the applicant's household must be employed and/or participating in a self-sufficiency program or activity as a condition of occupancy.
- d. All members of the applicant's household members must meet the screening criteria. Screening criteria includes:
  - i. prior landlord history, including rent payment and compliance with other lease obligations **during the relocation period;**
  - ii. payment history for utility charges **during the relocation period;**
  - iii. criminal background check;
  - iv. satisfactory home visit **during the relocation period;**
  - v. may not be a registered sex offender;



APPENDIX II  
Federal Schedule of Lump Sum Fixed-Costs

Federal Schedule of Lump Sum Fixed-Costs

<b>Uniform Relocation Assistance and Real Property Acquisition Policies Act, as amended, Fixed Residential Moving Cost Schedule (2005)</b>												
The payments listed in the table below apply on a State-by-State basis. Two exceptions and limitations apply to all States and Territories. Payment is limited to \$100.00 if either of the following conditions apply: (a) A person has minimal possessions and occupies a dormitory style room, or (b) A person's residential move is performed by an agency at no cost to the person.												
State	Occupant Owns Furniture									Occupant does not own furniture		
	Number of Rooms of Furniture									Addt'l room	1 room/ no furn.	Addt' room/ no furn.
	1 room	2 rooms	3 rooms	4 rooms	5 rooms	6 rooms	7 rooms	8 rooms				
Alabama	\$450	\$600	\$750	\$900	\$1050	\$1200	\$1350	\$1500	\$150	\$300	\$50	
Alaska	600	800	1025	1250	1450	1625	1800	1975	200	400	100	
American Samoa	282	395	508	621	706	790	875	960	85	226	28	
Arizona	650	750	850	950	1050	1150	1250	1350	100	345	60	
Arkansas	450	675	900	1100	1300	1475	1650	1800	150	250	50	
California	625	800	1000	1175	1425	1650	1900	2150	225	400	65	
Colorado	400	550	700	850	1000	1150	1300	1450	150	300	50	
Connecticut	575	750	925	1100	1325	1550	1775	2000	150	225	60	
Delaware	450	630	810	990	1125	1260	1395	1530	135	360	45	
District of Columbia	250	400	550	650	750	850	950	1050	100	225	35	
Florida	550	700	875	1050	1200	1350	1500	1650	200	450	125	
Georgia	495	715	935	1100	1320	1485	1650	1760	140	275	40	
Guam	282	395	508	621	706	790	875	960	85	226	28	
Hawaii	550	900	1250	1550	1850	2100	2350	2600	200	300	100	
Idaho	400	550	700	850	950	1050	1150	1250	100	300	50	
Illinois	550	700	850	950	1050	1150	1250	1350	100	475	50	
Indiana	425	625	825	900	1025	1150	1300	1400	200	375	100	
Iowa	550	700	800	900	1000	1100	1225	1350	125	400	50	
Kansas	400	600	800	1000	1200	1400	1600	1800	200	250	50	
Kentucky	450	620	790	960	1130	1300	1470	1640	170	350	50	
Louisiana	500	700	900	1100	1300	1500	1700	1900	200	375	60	
Maine	500	700	900	1100	1300	1500	1650	1800	150	300	75	
Maryland	350	500	650	800	925	1050	1175	1300	100	225	35	
Massachusetts	400	550	700	850	1000	1150	1300	1450	150	250	50	

APPENDIX III  
Detailed Relocation Budget (physical moves)

Detailed Relocation Budget

URA Relocation Physical Move (including moving costs, reimbursements, allowances, fees, utilities, and other eligible items)	\$ 75,000
Security Deposits for Non SHA public housing relocations	43,000
Relocation Program Administration and Counseling Services	49,262
Rental Assistance Payments (if applicable)	-
NonURA Return Physical Move (back to the new community)	37,500
Contingency @ 5%	10,238
<b>TOTAL</b>	<b>\$ 215,000</b>

CALCULATION OF PHYSICAL MOVING COSTS INCLUDING UTILITIES & DEPOSITS  
ESTIMATE OF PHYSICAL MOVING COSTS AND UTILITY RELOCATION COSTS BASED ON  
COSTS FOR 50 HOUSEHOLDS (Assumes 7 moves to another public housing unit, 43 to Section 8).

ESTIMATE OF SECURITY DEPOSIT PAYMENTS FOR SECTION 8 RENTAL DEPOSITS FOR 43  
HOUSEHOLDS.

ESTIMATE OF RENTAL ASSISTANCE PAYMENTS - NONE

ESTIMATE OF REOCCUPANCY RELATED PHYSICAL MOVING COSTS AND UTILITY  
RELOCATION COSTS (Assumes 30 households or approximately 60% of households will decide to return  
to the redeveloped site after construction).