

**5-YEAR PLAN**  
**HUD FISCAL YEARS 2005-2009**  
**BHA FISCAL YEARS 2006-20010**  
[24 CFR Part 903.5]

**A. Goals**

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD-suggested objectives or their own, **PHAS ARE STRONGLY ENCOURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS.** (Quantifiable measures would include targets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the spaces to the right of or below the stated objectives.

**HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.**

☒ **PHA Goal:** Expand the supply of assisted housing

**Objectives:**

- ☒ Apply for additional rental vouchers:
  - BHA will commit to pursuing additional funding for these vouchers whenever incremental funding is available.
  - BHA will pursue replacement housing and relocation vouchers in conjunction with any demolition/disposition of Public Housing units and with any HOPE VI application.
- ☒ Reduce public housing vacancies:
  - The BHA shall strive, within the constraints of implementing the 504 VCA and the HOPE VI redevelopments, to minimize the number of vacant and uninhabitable units and to maximize occupied and on-line units.
  - In family and elderly/disabled developments, work to attain a 30-day or less unit turnaround from date of vacate to date of re-leasing.
- ☒ Leverage private or other public funds to create additional housing opportunities:
  - Explore potential for additional housing development at Clippership Lane.
  - Continue to evaluate opportunity for development at Morton Street.
  - Leverage public and private funds for Franklin Hill redevelopment.
  - Complete planning study for an Assisted Living Conversion within the Elderly/Disabled portfolio.

- Expand upon project based assistance program, partnering with the City of Boston and private developers to create new affordable housing if there are adequate Section 8 vouchers available.
- Implement 1<sup>st</sup> Increment Replacement Housing Factor Plan at Maverick; Seek approval for and implement 2<sup>nd</sup> Increment Replacement Housing Factor funds plan.

☐ Acquire or build units or developments

☐ Other (list below)

☒ **PHA Goal:** Improve the quality of assisted housing

**Objectives:**

- ☒ Improve public housing management: (PHAS score)
- Achieve and maintain high performer status on PHAS (minimum score 90).
  - Continue on a monthly basis, a monitoring system for rent collection.
  - Continue to collect at least 98% of the current rent roll each month.
  - Have no more than 2% of the annual rent roll in arrears at any one time.
  - Continue training of appropriate BHA staff about housing programs including regulatory changes.
  - Provide informational meetings for advocacy agencies, and general public.
  - Monitor site-based waiting lists to ensure compliance with HUD regulations.
  - Complete all emergency work orders within 24 hours and other non-vacancy work orders within 25 days.
  - Increase occupancy percentages in all developments until all have achieved an annual vacancy rate not to exceed 3%.
  - Improve system for the timely submission of complete and accurate data to HUD's PIC system to meet HUD-established reporting rate.
  - Maintain and improve current scores in PASS and MASS portions of PHAS.
  - Establish pest control standards and work to implement a specific plan for each development.
- ☒ Improve voucher management: (SEMAP score)
- Achieve and maintain high performer status on SEMAP (minimum score 90) through continued coordination and monitoring of performance standards.
  - Create and implement a revised Section 8 Administrative Plan.
  - Establish standard period for lease-up process from when a Section 8 participant submits paperwork and the effective date of a new lease.
  - Implement portability standards and regulations.
  - Implement system to properly and adequately administer vouchers in surrounding communities.
  - Improve system for the timely submission of complete and accurate data to HUD's PIC system to meet HUD-established reporting rate.
  - Continue training of appropriate BHA staff about housing programs including regulatory changes.
  - Provide informational meetings for landlords, advocacy agencies, and general public.
- ☒ Increase customer satisfaction:
- Continue internal and external customer service initiatives emphasizing Public Housing residents, Section 8 participants, Applicants, Funding Agencies, Landlords, Advocates, BHA Personnel, and the General Public as our primary constituencies to be served.

- Develop and distribute on a regularly scheduled basis a survey questionnaire to residents about completed work orders and to Section 8 participants for annual recertifications. The survey would be sent to a predetermined percentage of randomly chosen residents and participants across the portfolio. Results will be reviewed and evaluated for possible actions the BHA may take to improve customer service and the experience for residents and participants around the work order and recertification processes.
- Create and implement a random customer service survey for applicants we contact either by phone or in person.
- Continue programs for residents and staff that emphasize a culture of shared-mission and mutual respect.
- Analyze customer survey results generated by HUD and/or BHA, particularly the Resident Assessment Satisfaction Survey (RASS) and identify areas where BHA can improve its service.
- Seek funding to provide BHA newsletter in Spanish/English.
- Create newsletter for landlords and Section 8 participants to post on website and develop e-mail lists of landlords and participants for BHA to use for distribution of information.
- Increase information available on BHA's website, including application forms, and landlord information.
- Establish a goal of scheduling hearings within 30 days of receipt and issuing a decision within 15 business days of the close of the record for processing of appeals of denials for admission to public housing, Section 8 tenant selection, and Section 8 terminations.



Concentrate on efforts to improve specific management functions:

A. Personnel and Operations Systems

- Complete and implement Personnel and Operations Manuals and educate staff (with an emphasis on new staff) to be in compliance with them. Establish opportunities for refresher courses.
- Provide training for use of job performance standards as funding permits.
- Implement Maintenance Mechanics program.
- Identify resources and procedural changes required to comply with all regulatory reporting and train staff on same.
- Continue to redefine job duties and responsibilities in order to more efficiently deliver services.
- Develop and implement skills training for site-based management and maintenance administrative staff.
- Create Operations Manual for Occupancy staff and train staff on same.
- Create Operations Manual for Section 8 staff and train staff on same.
- Implement Supervisory Manual and train staff on same.
- Continue to create interdepartmental committees on policy and procedures, regulatory compliance, personnel issues, reasonable accommodations, and customer service as needed.

B. Management and Maintenance Systems

- Implement and ensure compliance with routine preventive maintenance schedules.
- Establish a monthly reporting system that allows managers to measure all components of property management and establish site-based benchmarks and performance goals.
- Establish timely inspection and repair program to improve condition of occupied units and reduce number of resident generated work requests.
- Establish and implement a quality control program for supervisors to review at least 3% of all completed work orders in the previous week. (At smaller developments, the supervisor shall review no less than 4 work orders weekly.)

C. MIS and Technology Systems

- Provide BHA staff with appropriate computer and telephone technology to support their work.
- Train BHA staff to fully utilize computer and phone technology to support their work.
- Replace aged “legacy systems” with modern, integrated financial and property management software systems.
- Leverage existing technologies by integrating them with new systems.
- Create automated managing report systems for key housing and financial indicators.
- Develop on-site computer training on various software applications used by BHA.
- Identify processes that can become paperless, and implement imaging and document management systems.
- Create web access for public housing and Section 8 application forms.
- Implement new computer software system and business practices for Applicant Intake, Screening, and Offers operations in accordance with the BHA Needs Assessment recommendations and policies by 12/04.
- Implement new computer software system and business practices for Leased Housing operations in accordance with the BHA Needs Assessment recommendations and policies by 10/05.
- Implement new computer software system and business practices for Public Housing operations in accordance with the BHA Needs Assessment recommendations and policies by 7/06.
- Implement new computer software system and business practices for Financial, Human Resources, and other Administrative operations in accordance with the BHA Needs Assessment recommendations and policies by 4/07.
- Implement new computer software system and business practices for Capital Project management and development operations in accordance with the BHA Needs Assessment recommendations and policies by 12/07.

- Implement automated Voice Response System (VRS) for use in status lines for applicants, landlords, Section 8 participants, and residents.

#### D. Financial Systems

- Develop and make available to development managers and senior staff comprehensive site-based budget report formats that include operating income and all the development site costs including fringe benefits, collection loss, utilities and indirect costs generated from regional offices and from central office.

- ☒ Renovate or modernize public housing units:
  - Seek Hope VI assistance and other public and private funding for redevelopment at potential sites including Clippership and Franklin Hill.
  - Meet 100% obligation and expenditure requirements of the BHA's Capital Fund Program.
  - Execute Round III Energy Performance Contract at 15 federal sites (\$30-50 million in energy upgrades anticipated).
- ☒ Demolish or dispose of obsolete public housing:
  - Only in connection with the receipt of new Hope VI grants and other redevelopment strategies.
- ☒ Provide replacement public housing:
  - In connection with the receipt of new Hope VI grants.
  - Implement 1<sup>st</sup> Increment Replacement Housing Factor Plan at Maverick; Seek approval for and implement 2<sup>nd</sup> Increment Replacement Housing Factor funds plan.
- ☒ Provide replacement vouchers:
  - In connection with the receipt of new HOPE VI grants or the demolition or disposition of public housing.
- ☒ Other: Maximize health and energy conservation in the renovation and redevelopment of public housing.
  - Implement Energy Master Plan recommendations to realize cost-savings measures throughout the portfolio.
  - Implement energy performance contracts for the balance of the portfolio.
  - BHA will continue to participate in the Healthy Public Housing Collaborative to coordinate implementation of grant activities and recommendations relevant to the health, safety, and comfort of public housing residents.
- ☒ **PHA Goal:** Increase assisted housing choices

#### Objectives:

- ☒ Provide voucher mobility counseling:
  - Establish and administer portability procedures.
  - Preserve Section 8 tenancies to the greatest extent possible at or above the level served in 2004 subject to funding.
- ☒ Conduct outreach efforts to potential voucher landlords
  - Provide information sessions for property owners on Section 8 program.
  - Increase availability of information on BHA programs and processes via the web and e-mail.
- ☒ Establish voucher payment standards to meet market demands:
  - Establish payment standards to meet market demands.
  - Apply to HUD field office for exception payment standards (up to 120% of FMR) as reasonable accommodation for a person with a disability
  - Apply as necessary for additional neighborhood exception payment standards.
- ☒ Maintain and operate Section 8 homeownership program:
  - Expand the voucher homeownership program and continue to increase awareness to all Section 8 participants of this program and the prerequisite FSS program as funding permits.
- ☒ Implement public housing or other homeownership programs:
  - Implement the Orchard and Maverick homeownership programs in connection with HOPE VI.
- ☒ Implement public housing site-based waiting lists:
  - Implement and monitor site-based waiting lists in public housing program in compliance with all fair-housing laws and other regulatory requirements.
- ☐ Convert public housing to vouchers:
- ☐ Other: (list below)

## **HUD Strategic Goal: Improve community quality of life and economic vitality**

### ☒ **PHA Goal:** Provide an improved living environment

#### **Objectives:**

- ☒ Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
  - Monitor in accordance with Admissions and Continued Occupancy Policy (ACOP).
- ☒ Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
  - Monitor in accordance with Admissions and Continued Occupancy Policy (ACOP).
- ☒ Implement public housing security improvements:
  - Continue and enhance, to the extent possible, the current Public Safety program.
  - Maintain BHA Police accreditation through meeting Commission for Accreditation of Law Enforcement Agencies, Inc. (CALEA) standards.
- ☒ Designate developments or buildings for particular resident groups (elderly, persons with disabilities):
  - Seek extension for current Designated Housing Plan, and subsequently consider revisions, and, as appropriate, submit a revised plan for approval.
- ☒ Other: (list below)
  - Work with the City and Community Based Organizations to continue access to education and employment seeking services.
  - Work with the Mayor's Earned Income Tax Credit and Financial Literacy Campaign to ensure residents access to all tax credit programs, which assist them to increase their earnings.
  - BHA will continue to participate in the Healthy Public Housing Collaborative to coordinate implementation of grant activities and recommendations relevant to the health, safety, and comfort of public housing residents.



**HUD Strategic Goal: Promote self-sufficiency and asset development of families and individuals**

- ☒ **PHA Goal:** Promote self-sufficiency and asset development of assisted households

**Objectives:**

- ☒ Increase the number and percentage of employed persons in assisted families:
- Continue to manage resident services programs at selected family developments.
  - Continue to encourage Section 8 participants to enroll in the FSS program.
  - Seek additional funding for FSS program.
  - Encourage broad participation in the Section 8 homeownership program.
  - Provide assistance to residents who wish to learn how to start their own businesses through partnerships with local entrepreneurship programs.
  - Facilitate the transition of TANF recipients and Welfare-to-Work participants from welfare to meaningful permanent employment.
  - Help un- and underemployed residents find employment and training, as funding allows.
  - Explore the possibility of expanding the Self-Sufficiency Program to public housing residents.
- ☒ Provide or attract supportive services to improve assisted recipients' employability:
- Continue to seek funding to increase supportive services.
  - Continue the Memorandum of Agreement with the Workforce Investment Board to create a mechanism by which BHA residents have access to employment and training services.
- ☒ Provide or attract supportive services to increase independence for the elderly or families with disabilities.
- Continue to implement and manage the Resident Services Program at all Elderly/Disabled Program sites.
  - Continue to seek funding to extend a supportive services program for seniors at family developments; at the same time, collaborate with the staff in the elderly/disabled program on joint events as possible.
  - Complete planning study for an Assisted Living Conversion within the Elderly/Disabled portfolio.
  - Continue to seek funding to increase supportive services.
  - Continue to manage Mainstream Housing Program and apply for additional funding where available.
- ☒ Other: (list below)

- Continue to partner, as funding permits, with City and developers in creation of affordable housing through Project Based Voucher Program, which includes supportive service programs.
- BHA will seek to coordinate efforts with the City of Boston to respond to the needs of victims of violence, domestic and otherwise, and other identified threats to public safety or civil rights.

## **HUD Strategic Goal: Ensure Equal Opportunity in Housing for all Americans**

☒ **PHA Goal:** Ensure equal opportunity and affirmatively further fair housing

### **Objectives:**

- ☒ Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:
  - Review Limited English Proficiency draft guidance and implement, as financial and administrative constraints permit, those steps necessary to assure that persons who are not proficient in English are able to fully access BHA programs.
  - Utilize the BHA's Affirmative Fair Marketing Policy when conducting outreach for Public Housing programs.
  - Monitor the site-based wait lists at least every three years using independent testers or other means satisfactory to HUD to assure they are not being implemented in a discriminatory manner, and that no patterns or practices of discrimination exist; and such results will be reported to HUD. The BHA will take any steps necessary to remedy the problems surfaced during the review and the steps necessary to affirmatively further fair housing.
- ☒ Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:
  - Continue to enforce the Civil Rights Protection Plan, which was approved by HUD and the U.S. Department of Justice on 6/17/96 with revisions approved by the Department of Justice on 7/26/99.
  - Continue to provide resident and employment training initiatives.
- ☒ Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
  - Complete implementation of Voluntary Compliance Agreement signed with HUD in April 2002 to bring the number of accessible units to 5% of the total portfolio.
- ☐ Other: (list below)
  - Develop and implement Reasonable Accommodation in Employment Policy; also implement a corresponding training program for all BHA employees.
  - Update Sexual Harassment Policy with accompanying training.

## Other PHA Goals and Objectives:

- ☒ **PHA Goal:** Develop project-based budgeting across the BHA based upon Real Estate Industry's Practices and Standards.

### Objectives:

- ☒ Develop an organizational structure for site-based management:
- Maintain and improve with the implementation of new information technology systems, site-based systems required to meet standards for PHA asset management.
  - Continue to respond to and implement timely changes in response to new HUD regulations on project based management, accounting, and budgeting.

- ☒ **PHA Goal:** Establish a comprehensive community participation process to assure that all significant BHA policies receive appropriate review and recommendation.

### Objectives:

- ☒ Continue to recognize current and approved LTO role to review and advise on new and amended BHA policy.
- ☒ Update and revise existing tenant participation policy.
- ☒ Increase knowledge and availability of information regarding Section 8 programs and processes through newsletter, website, and e-mail.
- ☒ Work collaboratively with the Resident Advisory Board for purposes of reviewing and advising the BHA on all new and revised policies related to the Annual and Five-Year Agency Plan.
- ☒ Continue to work with the appointed BHA Monitoring Committee.
- The BHA commits to nominating at least one Section 8 participant to serve on the Monitoring Committee in each nomination cycle.

The BHA will strive to eliminate any gap in service time between the end of one monitoring committee and the beginning of the next term.