



Agenda, Minutes, Reports, and Resolution

Board of Commissioners Regular Meeting

Monday, August 26, 2024, at 6:00 pm

Hope White, Chairwoman

Marcus D. Goodson, Interim Chief Executive Officer

Sanford Housing Authority (SHA)  
Board of Commissioners Regular Meeting  
AGENDA

Date: August 26, 2024

Time: 6:00 pm

Place: 317 Chatham St. Sanford NC 27330

Please silence all cell phones and refrain from cell phone use during the meeting

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Board of Commissioners Meeting Monday, July 22, 2024

## BOARD MINUTES

A meeting of the Board of Commissioners for Sanford Housing Authority was held on Monday, July 22, 2024, at 6:00 p.m. at SHA Central Office, 317 Chatham Street, Sanford, NC 27330. Notice of this meeting was duly posted.

1. Roll Call:

ATTENDANCE:

Commissioner Hope White, Chairperson  
Commissioner Jackie Dalrymple  
Commissioner Karen Wicker  
Commissioner Erin Britton  
Commissioner Diane Sinnamon

ABSENT:

Commissioner William Newby, Vice Chairperson  
Commissioner Holly Aeschliman

Ms. White asked the new board members and all attendees to introduce themselves. Ms. Dalrymple said that she has always been a resident of Sanford and currently works at Bristol Myers Squibb as a manager and has been in the pharmaceutical industry for 16 years, she has one son and one grandson.

Ms. Sinnamon said that she has been living in Sanford for about 40 years, she was raised in California, and she has five children, she used to work at the copy center for 13 years. She said that she likes the greenery of North Carolina.

Dr. Wicker said that she has lived in Sanford for a long time. She was born in Washington DC and moved to Sanford from Philadelphia. She said that she enjoys serving the Sanford Housing Authority and wants to help everyone get housing.

Ms. White said she was born and raised in Sanford and loves living here; she couldn't see herself anywhere else. She is a graduate of North Carolina Central University and has been on the SHA board for a long time.

Ms. Britton shared that she is from Wake County and moved here about eight years ago because her husband is from Sanford.

Mr. Ferguson introduced himself as the City Liaison.

Jeffrey Blackwell introduced himself as the CFO (Chief Finance Officer) and, noted that this is his second stint working at SHA. He said that he also graduated from NCCU.

Sherri said that she is the Director of Operations and has been with SHA for one year and a week. She moved to Sanford from Florida and started her housing career in Nevada.

Marcus Goodson stated that he is the Interim CEO (Chief Executive Officer) and that this is also his second term here at SHA. He was here from 1997 until 2002 when the office was on First Street. He was born and raised in Raleigh and attended college at East Carolina University as an undergraduate. He said he has been here since September 2022 and is typically here two weeks out of the month and back in Ft. Myers Florida for two weeks. He stated he would give each new board member his cell phone number in case they need to reach him.

Ms. White said Roberts Rules are used for the board meetings and asked if the books had been ordered. Mr. Goodson said yes, we ordered ten books. She asked when we should get them, and Mr. Goodson said they should arrive any day now. Ms. White said that some people may already know Roberts Rules but wanted to get the books ordered in case they do not.

## 2. APPROVAL OF MINUTES:

Ms. White asked for a motion to approve the minutes from the June 24, regular meeting. Dr. Wicker motioned. Ms. Britton seconded, all were in favor; and the motion passed unanimously.

### **Financial Report**

Jeffrey said that he is working on getting the financials up to date. He said that the agency has been without a CFO for about a year and a half and during this time, we have changed software programs and are now in the process of reconciling old transactions. Therefore, there is a gap in reporting because the invoices that came in were not invoiced, leaving unpaid invoices so payments were not made on time. When he started on April 15<sup>th</sup>, there were quite a few invoices that were not in the system, so we are trying to catch up with invoicing. He said that each week there are new discoveries and before the last board meeting, he just received the audited financials from 2022. He said two weeks ago he received tax returns for MGG from 2021 so as a CFO the dilemma that it presents for him is that at the end of a tax year, you must adjust interest and then when the auditors are auditing, they also need adjusting interest for the accounting department. He said this creates a problem because he must have good starting numbers. We have been working hard to keep pace with payments and get up to date with them. Also, we are categorizing these expenses and payments so we can document these transactions when we do have those numbers.



Jeff told the board that each year they should expect financial statements, audits, and tax returns. He said currently, we are in the 2023 audit year for public housing, and we are completing the auditing and tax preparation for that year which has been outsourced. He said when we get the three documents back, we will have good balances to build on. Jeff said that now that we are two months before the end of the 2024 fiscal year and his objective was to have financials by June but each month, he is being given new obstacles to overcome but he should have financials by the end of the fiscal year, which is September, and it should not be a problem. He said we need information from the auditors and tax preparers to give good balances.

Jeff said that we are making some modifications to the invoicing process. Also, in the bank accounts that we have, there was only one set up to do direct deposit payments. The old accounting administration was accumulating expenses on the different project areas like public housing, HCV, and tax credit properties and then making transfers to the main operating account, even though each project has its operating account. This creates a problem because we do not have transaction listings that you can reconcile with invoices. He said that we are having to reinvoice. He said that we are trying to deal with the bank and get clearance to add direct deposit so that each project can pay their bills out of their operating accounts instead of transferring from Matthews and Garden-Gilmore operating accounts so that the reporting will be clearer in terms of invoicing and aligning with payments.

Jeff marked some transfers because interagency transfers are frowned upon, and auditors may have questions about these transactions. Jeff said that we are working to change this practice that has been adopted, which was not necessarily in the operating procedures so that they line up. Ms. Dalrymple asked for clarity on making changes and Jeff replied that we are working to fix it by operating the way that it is supposed to be according to our Internal Control Policies. Jeff said that if it is not set up to do direct deposit from the bank end and the software end, we must update the operations to allow it to do so, then we can do fewer transfers, and accounting can be easier to report and manage. Ms. Dalrymple asked if one person is paying the bills and Jeff said that we manage the paying of all the bills, but we need to correct the pot that the bills are being paid out of instead of them being paid out of the one pot. He said, one person creates the transactions in the system, he approves them and processes the transactions through the bank if it is an ACH transaction. He said at one time one person was doing both, but when he got here, we changed that because that would be an audit finding.

He said that since the 2023 financials are being audited, we will start making journal corrections before 2024 financial data can be compiled. Jeff asked if there were any questions. Dr. Wicker asked where we are with the City of Sanford, and he said that we are on track with the City of Sanford. Jeff said that when he says that we are on track, he means that we are aware of the bill amounts and are communicating with the vendors regarding payments. He said that the only thing he has questions about are the utilities. He said that he has communicated with Sherri that we need to get out of the utility business of paying peoples' utilities especially since there is a built-in utility allowance option that we can use. He said that he is communicating with the City of Sanford, Dominion Energy, and Duke Energy so that they will change the billing to bill by project instead of as individual units. He said that

the current way these vendor bill poses a problem because when they send a bill that has various projects on it, it becomes hard to break the invoice down and separate the invoices by project considering that they have their own operating accounts; we want the invoice to match the project so that it is easier to invoice and pay.

Ms. Dalrymple asked, “What does BDO stand for.” Jeff said that BDO was the fee accountant who oversaw creating our financials up to December of 2023. She asked what MGG stand for. Jeff said, MGG is Matthews, Garden, and Gilmore. Ms. White explained further that MGG is three of our properties that were converted from public housing to project-based voucher projects, where tenants get a voucher to live in units on the property. We have an investor who owns 99%, we own 1%; after 15 years, we can buy it back for \$1, but right now, we are the property manager for those properties. Technically, we do not own the properties. Ms. Dalrymple asked about SACS, Sherri explained that it is Scotts Accounting Software, which is our housing and accounting program.

Mr. Goodson said, typically when there is a new commissioner, he takes them around and shows them all the properties, but he has not been able to get that done, but he will.

There were no other questions.

## **Department Head Reports**

### **Public Housing Report**

Sherri reported the following:

There is one manager and an assistant manager for the properties.

#### **Occupancy Rates:**

**Linden Heights: 85% occupied**

**Utley Plaza: 93% occupied**

**Foushee Heights: 83% occupied**

**Harris Court: 96% occupied**

**226 Linden: 100% occupied**

We have some vacant units that we are working on to get occupied, we did three move-ins last month and five transfers. We must periodically transfer people out if there is something in their unit that cannot be fixed right away. She said, in these cases, it is plumbing that is underground. For example, we have 2 units that are offline that we cannot fix, and we have to do plumbing in the walls and in the floors.

#### **Maintenance Report**

**Linden Heights:** Twenty-eight work orders were issued, twenty-six were completed and the other 2 may have been completed but we have to close the month out at noon on the last day of the month, and

usually the remaining work orders are done the very next day. The average turnaround time to complete work orders was two and ½ days.

Emergency Work orders:

**Linden Heights:** Twelve were issued and twelve were completed within 24 hours.

**Utley Plaza:** Eighteen work orders were issued, and sixteen were completed.

Emergency Work Orders: Seven work orders.

**Foushee Heights:** Eleven work orders were issued, ten were completed, and one was outstanding.

Emergency Work Orders: Four work orders.

**Harris Court:** Nine work orders were issued, and seven were completed.

Emergency Work Orders: Three work orders.

**226 Linden:** Three work orders were issued, and three were completed.

Emergency Work orders: Zero work orders.

Sherri said she hopes the board can see that the work orders are being completed quicker. When she started it took about two hundred days to complete work orders. However, with the unit turns, we have more work to do with that, but as far as turnover, the staff is doing well.

Ms. Dalrymple asked about the \$87 charge to tenants on the report. Sherri said tenants are charged for damages in their unit beyond normal wear and tear and are charged at move-out. Charges can be holes in the wall that are larger than a quarter. She said broken doors are a charge because the doors are solid wooden doors that should not need repair. However, if things in the units were old and needed to be replaced anyway, we would not charge tenants, which is why you do not see a lot of charges to tenants. She said that now the property managers take move-in pictures so when tenants move out and there is damage, we have proof that it was not like that when they moved in. She said that because she was not here and did not see the condition of the unit at move-in, she did not charge the tenants.

## **MGG**

**Sherri reported the following:**

**Vacancy Report:**

**Matthews Court:** Has fifty units for the elderly/disabled, they were at 90% occupied.

**Garden-Gilmore:** Has 126 units, they were at 76% occupied. Together, there is an 83% occupancy rate.

The vacant units at Matthews Court which is a total of five; however, when a unit becomes vacant at MGG, we must report it to NCHFA because we must report it for the targeted units for the homeless which is what we agreed to when we agreed to convert MGG to a tax credit property. So, we must send

these units to NC Housing Finance, and we cannot rent them until they tell us that they do not have anyone for these targeted units. NCHFA works with homeless people across the state and can refer applicants. With Matthews Court, we just got back the 5 units from the state, we have 5 ready files that Section 8 has made ready; Section 8 then sends the ready file to the property manager who then must make the file tax credit ready. Each applicant must complete two qualification processes: Section 8 and tax credit. After the tax credit file is done, the file is merged and then the file is sent to a third-party compliance company who then tells us if we did everything with the file to be able to lease the unit to the person. Finally, we must have a third-party unit inspector, who we pay to come out and determine if the unit is HQS approved; we cannot do our own inspections. Sherri said that therefore, it takes longer to be able to lease the units which is not always the management's fault.

### **Maintenance Report:**

**Matthews Court:** There were twenty-two work orders issued, nineteen were completed and three were outstanding. There were three emergency work orders issued.

**Garden-Gilmore:** There were seventy-six work orders issued, and sixty-five were completed. There were eleven emergency work orders issued.

Mr. Ferguson said that he received a call about a fallen tree on Garden Street a couple of weeks ago that had stakes in it and was not safe. He said that the tree was near the railroad tracks. He said that the tree had been uprooted. Sherri said that we had gotten a call about it. She said that the tree is on our property during a storm and that she had contacted a company to come out and make it safe by digging the roots up. Mr. Goodson said that we have mitigated it, but we must get the stump removed. Sherri said she also got a call last Thursday or Friday about a fence by a property behind the hospital, but she did not know what they were talking about, she was googling the address, but we do not have a property on the street named. She said the person complained about a fence at the back of one of the properties. Mr. Goodson said that that property is behind the hospital. She said when she looked up the street, it was behind the hospital and Mr. Goodson said, that's Gilmore Terrace. Mr. Goodson said that we are trying to get someone to work part-time with MGG who knows file management, and who we don't have to train. He said that he had a meeting scheduled with Brenda Williams who used to work for him when he was here before. She is currently retired but has agreed to work part-time to help MGG get caught up on the files. He will reschedule the meeting. Ms. White said that she has a question, but she will ask it in the closed session.

### **HCV**

**Sherri Reported:**

We are at 77% of utilization of our regular vouchers, fifty-six of our VASH vouchers, Harnett Training School is at 95%, Matthews Court is at 86%, Garden-Gilmore is at 78% and 226 Linden is at 100%. She reiterated that we have no control over VASH and Harnett Training School and HUD does not count the utilization rates against us when we complete the SEMAP at the end of the fiscal year where because we have no control over these programs; these programs send us their clients that will use the

vouchers. VASH vouchers belong to the VA (Veterans Affairs) and Harnett Training School vouchers belong to them. Therefore, if the voucher rate is low for VASH and Harnett Training School it is because they have not supplied us with tenants. Total occupancy is at 78% and HUD requires that you be at 95% or higher to get your SEMAP scores based on either your utilization rate must be at 95% or the utilization of your funds. She said that we are at 105% utilization of money; therefore, we would get our SEMAP points. She said, if more people are using more of the funding, then there is a smaller voucher number to give and so based on where we are today, we would get all our points. She said that it varies with what is going on in the world; when people are not making as much money, then we pay more for the voucher. She noted that on the second page, the MGG applicant numbers on the waitlist were twenty-three for a one bedroom, she selected twelve and already referred them to the MGG staff. She said that Keren is constantly making sure that the files stay compliant, but it is up to the management staff at the property to keep it compliant because the information becomes out of compliant after 120 days. She said, if they are not housed, Section 8 must do it all over. She said that if you see zero has been referred, it is because we have no vacancies because the file will get old, and we will have to redo it anyway.

Sherri said that when a vacancy becomes available, the property management staff must notify Section 8 immediately so that they can start working on a file. Ms. White stated that Matthews Court does not have two bedrooms, and this is her first time seeing this. Sherri said that Matthews Court has 2-2 bedrooms. She asked if Section 8 has been working on the new list. Sherri said that the next batch of interviews will be from the new list. Keren pulls fifty applicants at a time, and you may get between 15 to 20 to show up. She said that that is why we only keep 1500 applicants on the waitlist so that it does not extend out over multiple years, because that is terrible to do. She said that our goal is to never have a waitlist that goes beyond a year and a half.

Sherri said that we are waiting on three quotes to come back for Section 8 from Nelrod, Cordell, and Prio, which are third-party organizations that do Section 8 audits. She said that their services are often pricey, but we will wait until we receive the quotes back. Ms. White referenced that during the last board meeting, she asked when the last time the Section 8 files were audited because there is 1 Section 8 manager and they had about 796 vouchers that she audits; therefore, she asked to have a third party audit the files. She said a long time ago, the feds came down and slapped our hands for the public housing files. She said that public housing gets audited all the time, but not Section 8 and they could be making mistakes, so she just wants to be proactive. Sherri said that our auditors do audit Section 8, each year, the auditors ask for files. Our current audit consists of only Section 8, with no public housing auditing; the auditors have received about 25-30 files to audit, so they did get a good sample this year. Sherri said that she does not know when the last time public housing was audited, usually it's every 3 years but is not sure the last time the public housing files were audited for this housing authority by the auditors.

Sherri said next Friday, August 2<sup>nd</sup>, we will participate in a back-to-school bash for the homeless which is hosted by the Salvation Army of Wake and Lee counties. We will have a table out there and she hopes that we can get a few applications out to some families at the event; the event is from 10 am until 1 pm. She said that Shkera will be attending to distribute FSS (FAMILY SELF-SUFFICIENCY) information. Mr. Ferguson said that they usually have different companies out there that give out different school supplies, just as an idea for the housing authority but stated that housing is the most important thing. He said that a couple of years ago, people walked away with clothing and other items.



Sherri said she called the program manager and told her she would like to give out housing information, and they said it would be great. Sherri said she is used to participating in it and when she learned about it, she asked for volunteers from SHA, and now we will be participating.

Sherri said that Ms. Gilchrist previously spoke about a leaning electric pole on Linden, she said that we called Duke Energy on June 10, the end of June, and July 17<sup>th</sup> to request that someone come out to make sure that it poses no danger, but Duke just recently created a priority ticket to come out and make sure that it does not pose a danger. Mr. Goodson said that he thinks that it is cracked, and Sherri said that it looks like it was struck by lightning, so we are documenting that we are trying to get someone out here to check on it.

### **Resident Services**

There is a summer backpack program that Shkera is participating in that gives children canned goods, drinks, fruit cups, and candy. He said that these summer programs are valuable to the children because during the summer when children are not in school, they may miss some of the food programs and Shkera is excited to be a part of it. Ms. Dalrymple asked if it was the backpack program through the CUOC. Mr. Goodson said that he was not sure and should have asked her that.

Shkera is establishing Resident Councils at each development. She has a meeting set up for Garden St. On August 15<sup>th</sup> we are confirming dates for the other developments. Mr. Goodson said that typically, we want to have them at all developments, but unfortunately, sometimes people do not get involved, she is working to improve interest in the residents.

There is a back-to-school event through the Salvation Army, and we are committed to the August 2<sup>nd</sup> event.

We are still working with the food pantry, but it is on pause until we can secure transportation. We must pick up the food from the Raleigh or Sandhills Food Bank locations. We passed the food safety and site inspection, so we are ready to go, but just trying to get transportation secured. The next step is to shop, where we go to the sites and shop for the food that we want to bring back to the food pantry to make it available to our residents and the homeless.

National Night Out is coming on October 1<sup>st</sup>, Mr. Goodson said that he is accustomed to it being around August, but it has been pushed back. Mr. Ferguson said that the city switched it up because of the heat. Mr. Goodson said that he is hopeful that we will have Resident Councils started so that we can have them at multiple locations to get more communities and residents involved.

There is a Resident Council calendar that should be out this week, and Mr. Goodson will email it to the board so you can see when things are happening. Shkera has promised Mr. Goodson that it will be out this week so that he can get it to the board.

Mr. Goodson asked if there were any questions, there were no questions.

## **New Business**

### **TAG Contract –Stewart Manor**

Mr. Goodson said that because there are some reservations about the TAG contract, he would like to review it before the agreement is executed. He said that he should not have been pushing so hard to get this done and he would therefore like to bring it back to the board for review.

Ms. Dalrymple said that she felt like some items were missing as she was trying to review the information based on what she was used to seeing in contracts. Ms. White asked Mr. Goodson if he would like to call this to a vote or if he just wanted to have the discussion. Mr. Goodson said he thinks he pushed too hard, and it should come back to the board. Ms. White asked for a motion.

Ms. White carried out the motion for the board to vote on executing the contract for financial advising through TAG. The motion was seconded by Dr. Wicker. Ms. White asked Ms. Dalrymple about her concerns regarding the name, address, phone number, Better Business Bureau, Rating, and pricing. She asked if anyone else had any comments or questions. Dr. Wicker said yes, and she thanked Mr. Goodson for bringing it back up and stated that she still had some reservations. She said that it is fiscally irresponsible for us to enter another contract without current 2024 financials. Dr. Wicker said that she is not throwing any rocks at Mr. Blackwell and that she appreciates what he has done, but potentially, it could be a lot of money so she cannot vote to enter this contract. Ms. White said that she hated that Mr. Newby and Holly were missing, but she would not talk anymore. She asked Ms. Sinnamon if she had any questions, and she said no. Erin said that she agrees that we do not have all the information regarding the current state of the finances and therefore does not think that we should enter into another agreement.

Ms. White asked if Mr. Goodson had any comments and he said no but after reflecting, he believed that he pushed too hard. Ms. White explained that Stewart Manor has been out of commission and should have been out of commission long before it was and some of the board members fought hard to get tenants out of the building, so TAG was brought in to help put together the financing for the renovation of the Stewart Manor, but they are not the contractors. Ms. Dalrymple reiterated that TAG does not do the work and Ms. White said that TAG helps us to find the money for converting it to a tax credit, etc. Ms. Britton said that what they are doing will be beneficial, but we owe a lot of money. She said as great as they seem, we are having a problem paying our bills. Ms. White said that at one point we owed over \$200,000 for outstanding water bills with the City of Sanford. Ms. White said that she is not blaming anyone because we have had a lot of transitions. Ms. Dalrymple stated the outstanding balance with the City of Sanford from the May 2024 board packet was \$161,092.07. Ms. White asked for a vote; all board members voted against the execution of the contract with TAG.

### **1000 Carthage St.-Stogner Proposal**

Mr. Goodson advised that we have a feasibility study on renovating 1000 Carthage St, the old central office. He said that he visited the old central office before he returned to Florida and was startled by some of the things that had taken place in the building from the building sitting. He said that Stogner, the architect who the agency has used for several years has put together a proposal that costs \$6,850 to assess the building to give us a scope of service to bring it back online and so that the board can make an



intelligent decision to determine if we have the wherewithal to restore the building or if the board needs to make a different decision about where we go from here. He said that the property is valuable, even though the building needs a lot of repairs. Mr. Goodson said that he made the recommendation to proceed with Stogner because we cannot allow the building to continue to sit. Ms. White made the motion and asked for a second; Dr. Wicker seconded, and there were no questions.

Ms. White said that Stogner did a feasibility study before and asked since they have already done one, if they could do better with their cost. Mr. Goodson said that if the board approves it, he will negotiate the cost with Stogner. Ms. White said that the reason she is asking is because before Mr. Goodson got here, the building flooded; she said something happened with the gutters in the roof and they had to tear up the flooring. She said that the previous board was trying to get staff out of the building because there was only one working bathroom with about 16 or 17 staff members in the building. Ms. White said that downstairs, there is open space that we were not using, and the walls were not up, but it is prime real estate. The previous CEO had this same study done to get the building up to par, we owe no money on the building and could not decide on how to best use the space; whether as a place for traveling nurses or something else. She said that though we had insurance, insurance for some reason was not responsible. She said that the previous CEO stated that maintenance was not cleaning the gutters like they should. She reiterated that the previous study was done before we moved out of the building. Sherri said that we have been out of the building for a year.

Ms. White said that she believes that we borrow the money on the place and at least fix up the top floor to get back in our building and then figure out what we need to do to the bottom. We pay rent to lease the new building but have a building that we owe no money on so we should get it fixed. She asked what the rent is in the temporary building and Mr. Goodson said that we pay \$4500 per month. Mr. Goodson said that with the current interest rates for a million dollars, the monthly payment should be about \$6200. Mr. Goodson also said that flood insurance usually does not cover from the top down, it covers from the bottom up. Ms. White said that Stogner can go in to do the feasibility report but thinks that they should be willing to do it at a much better rate considering that they did one within the last 5 years. Mr. Goodson said that he will negotiate it if it is approved; he will follow up with them tomorrow morning. Ms. Dalrymple reiterated that if we approve it, we will get back into the building and rent out the bottom portion to recoup the debt; Ms. White said, we have not gotten that far yet. Ms. White asked if there were any questions, and there were no questions. Ms. White said that even if they do not move on the price, we can still work with them. Mr. Goodson said that he would negotiate, and they do want to work with us. All were in favor of moving forward with allowing Stogner to conduct a feasibility study for the renovation of 1000 Carthage St.

### **Carolina Council Conference**

Mr. Goodson reported that the conference is scheduled at Myrtle Beach from August 25<sup>th</sup> through August 28<sup>th</sup>. He said that we have secured three rooms for board members, but no staff members will be going this year. Mr. Newby expressed interest in going, and there are two additional rooms available if any other board member wants to, and if not, we can cancel them. Mr. Goodson said that the conference is for the public housing council for North and South Carolina. Jeff said that it is an effective way to

network with other people in the industry. Sherri said that these are breakout sessions where the council will give updates on HUD policies, new initiatives, and new tax credit rules. Ms. White said that she will not be able to attend but hopes others will attend; the housing authority covers the hotel room and a per diem.

### **Roto-Rooter Finding-Jeffrey Blackwell, CFO**

Mr. Goodson said that we are uncovering whatever we can about the finances and Jeff has more information. Mr. Goodson said that when he first got here in September 2022, one of the first things he had to tackle was that there was a 30K dollar transfer to Roto-Rooter but somehow, he was told that it got messed up on their end and they wanted us to send them another 30K dollars and he said absolutely not and then Roto-Rooter went away. Jeff said he received an email from Roto-Rooter saying they would love to provide services to us again and how we could fix the issue. He asked them about the invoice, and they said that it was \$31,199.00. He said that the lady got sent to the wrong account. He said, in SACS when we do direct deposit, their account information is in the system. Ms. White said we filed a police report.

Jeff said that the only way that the information was changed was that the vendor submitted a document requesting an update to their banking information. He said that he looked for that document, so then he went into the system to see what banking information was there and there was none which tells him that someone took the information out, but he does not know. There is a draft file sent to the bank from SACS and the draft file from the computer shows the routing number and account number. He pulled up the reoccurring account number from previous transactions for Roto-Rooter and the one for the transaction in question, which was done on January 28, 2022, which is the last working day of the month, and ironically, the routing number from Google came up with Regents Bank, but the routing number for Roto-Rooter was usually PNC. He said that he spoke with a representative at Regents Bank to find if this account number was Roto Rooter's banking account number and if not, whose it was. The representative could not tell him who the account belonged to but asked if she could tell him if it was a business or a personal account, based on what she said, he concluded that it was a personal account. He then called Truist and spoke with Treasury and they are tracking this transaction to see if we can determine what account the money went to.

Jeff said there was a drawdown made on the 20th of January, and they did the direct deposit on the 28th of January to be done on the third. He said that if you don't look at the account daily and know how to read the various balances, you may not catch if there is something strange going on with the balances because it takes some time for the direct deposits to post, the balances will look the same until it goes through. Jeff called and asked Roto-Rooter if their bank account had changed since January 28, 2022, and he said no. He stated that only someone who has a login for SACS can make changes to account information, and only people who have a token to initiate and approve direct deposits can access the direct deposit module on the Truist site. He said that the \$31,199.00 was taken from us and deposited it into a different account. Mr. Goodson said that what he was told was that it was wired but went to the wrong account on their end but now he is hearing something different, and he wants the board to know.

Ms. White said that she got a police report filed by Latrice McCrae on February 28, 2023. She said that our attorneys responded and said that they were working with the former CEO to follow up on the issue that SHA attempted to pay Roto-Rooter a balance of over \$31K, Roto-Rooter's system was hacked, and the scammers sent a fraudulent routing number and account information. SHA made a payment to the fraudulent account and Roto-Rooter did not receive the payment. Roto-Rooter has yet to file a lawsuit, and the previous CEO was working with the bank to figure out where the money went. Jeff said, but something in our system got changed and Erin said that would not be a hack to Roto-Rooter's system. Ms. White said that she is reading what our attorney Howard Rhodes wrote, he said in his email on January 3, 2023. Mr. Goodson said so it sounds like we put the fraudulent information into our system and the payment was made. Ms. White said the incident report date is February 28, 2022, which was filed by Latrice McCrae, so it has been ongoing. Ms. Britton asked if Latrice had given the police the email from Roto-Rooter.

Jeff said that someone on our end had to take the old bank account information out of SACS. Mr. Goodson said that if Roto-Rooter got hacked, then there should be a record. Jeff said that there was a drawdown for that exact amount. He said that usually when we drawdown money, it usually is done in batches with more people. Mr. Goodson said that when they got hit in Florida, it was not for the exact amount of an invoice. However, if the scammers saw the invoice, then they would know what to ask for and wonders if other organizations who use Roto-Rooter got taken advantage of it too. He said that he would let the board know if he finds out anything else. Ms. White said, "Who do you know that you owe \$30K to and they do not come after you?"

Mr. Goodson said that he has had another contractor that did work for us that we owe money to out of Raleigh that has not come after us because he has handled it and said that we are not paying. Mr. Goodson said that he claims to have represented the housing authority during the RAD (Rental Assistance Demonstration) conversion but Stogner, nor the other contractors know anything about him. He said that he has invoices from him. Ms. White asked for his name and Mr. Goodson said that he would get it for her. He said that he had spoken with the man multiple times and told him that if we owed that amount of money, why had he not come to see us yet?

Ms. White said that she has not heard of any consultant that we owe a large amount of money to. Mr. Goodson said that we scrutinize every invoice. Ms. White asked if Mr. Goodson would like the emails about Roto-Rooter and Jeff said that he would like them. Ms. White said that once the police could not find where the money went, they closed the case. Jeff said that it was. Ms. White said, the previous CEO, had her personal accounts tied to the agency's Truist account, right after OIG had just left. Ms. White stated that she did not know if anything was missing but the lady at the bank who discovered it said that this should never have happened. She said that the previous CFO worked from home during that time. She said that the agency wanted to do a forensic investigation, but the agency could not afford to.

#### **Commissioners' Comments**

There were no additional comments.

### **Public Comments**

There were no public comments.

### **Closed Session**

Dr. Wicker motioned to go into closed session to talk about personnel matters. The motion was seconded by Ms. Britton. Mr. Goodson said that he has paper copies of the CEO candidate resumes for each candidate. The board went into closed session at 7:11 pm.

### **Adjournment**

The board meeting adjourned at 7:55 pm.

---

Marcus D. Goodson

Date

3. Financial Report-July 2024 (To be presented at the board meeting)

4. Public Housing and 226 Linden Vacancy & Maintenance Report

A. Vacancy Report July 2024

VACANCY REPORT AS OF July 2024								
PROPERTY	TOTAL UNITS	Office Space Non Dwelling Units	Offline HUD Approved	Vacant Units in Maint	Vacant Units Ready to Rent	Total Move In for the month	Month Turnaround Days	Current Occupancy Rate
Linden Heights	47	1	2	2	1	0	138	93%
Utley Plaza	55	1	0	4	1	0	124	90%
Foushee Heights	40	0	0	2	0	3	62	93%
HARRIS	26	0	0	2	0	0	59	92%
226 Linden Avenue	5	0	0	0	0	0	0	100%
Total	173	2	2	10	2	3	383	94%

**B. Maintenance Report-July 2024-End of Month**

**SANFORD HOUSING AUTHORITY MAINTENANCE DEPARTMENT REPORT**

**July 2024 MONTH END REPORT**

<b>WORK ORDERS</b>	<b>Linden Ave.</b>	<b>Utlely Plaza</b>	<b>Foushee Heights</b>	<b>Harris Court</b>	<b>226 Linden</b>
<b>TOTAL WORK ORDERS ISSUED</b>	27	19	15	50	1
<b>TOTAL WORK ORDERS COMPLETED</b>	24	15	14	15	1
<b>OUTSTANDING WORK ORDERS</b>	3	4	1	35	0
<b>AVERAGE COMPLETION DAYS</b>	1.29	0.34	0.41	1.7	0.12
<b>EMERGENCY WORK ORDERS ISSUED</b>	4	3	2	2	0
<b>EMERGENCY WORK ORDERS COMPLETED With In 24 HOURS</b>	4	3	2	2	0
<b>OUTSTANDING EMERGENCY WORK ORDERS</b>	0	0	0	0	0
<b>% OF EMERGENCY WORK ORDERS COMPLETED With In 24 HOURS</b>	100%	100%	100%	100%	100%
<b>Amount Charged to Tenants</b>	\$40.00	\$0.00	\$0.00	\$40.00	\$0.00



5. MGG/RAD Vacancy & Maintenance Reports  
A. Vacancy Report-July 2024

<div> <div>Stew</div> <div> Matthews Court, Garden Street and Gilmore Terrace </div> </div>						
VACANCY REPORT AS OF JULY 2024						
PROPERTY	TOTAL UNITS	Office Space NON DWELLING UNITS	Total Number of Move Ins for the month	Vacant Units in Maintenance	Month Turnaround Days	Current Occupancy Rate
Matthews Court	50	1	2	4	94	92%
Garden Gilmore	126	3	7	24	727	81%
Total	176	4	9	28	821	87%



**B. Maintenance Report-July 2024**

<b>MGG SANFORD HOUSING AUTHORITY MAINTENANCE DEPARTMENT REPORT</b>		
<b>JULY 2024 MONTH END REPORT</b>		
	<b>Matthews Ct.</b>	<b>Garden-Gillmore</b>
<b>TOTAL WORK ORDERS ISSUED</b>	27	54
<b>TOTAL WORK ORDERS COMPLETED</b>	25	47
<b>OUTSTANDING WORK ORDERS</b>	2	7
<b>AVERAGE COMPLETION DAYS</b>	1	3
<b>EMERGENCY WORK ORDERS ISSUED</b>	1	7
<b>EMERGENCY WOs COMPLETED WITHIN 24 HRS</b>	1	1
<b>OUTSTANDING EMERGENCY WORK ORDERS</b>	0	0
<b>% OF EMERGENCY COMPLETED WITHIN 24 HRS</b>	100%	100%
<b>Amount Charged to Tenants</b>	\$0.00	\$20.00

### 6. HCV Occupancy/Intake Status Report 7/31/2024

This summary reflects the actual number of Units Leased and Paid at the end of the month

**July 2024**

	Allocation	Actual Housed Units Leased	Lease-Up Rate %
HCV (Regular Vouchers)	708	549	78%
VASH	25	15	60%
Harnett Training School (PBV)	37	36	97%
226 Linden Apartments (PBV)	5	5	100%
Matthews Court (RAD)	50	45	90%
Garden Street / Gilmore Terrace (RAD)	126	99	79%
<b>Total HCV</b> *At least 95%	<b>951</b>	<b>749</b>	<b>79%</b>

<b>July 2024</b>	Funds Received	Funds Utilized	Utilization Rate *At least 95%
<b>Total HCV</b>	<b>\$427,412.00</b>	<b>\$436,875.00</b>	<b>105% TYT as of 4/30</b>

New Vouchers Issued: thirty-eight

Total Vouchers Searching: 137

New Admissions: eleven

End of Participation: five

**SEMAP Indicators as of July 31, 2024**

<b>SEMAP Indicator</b>	<b>Current</b>	<b>HUD FYE Requirement</b>
MTCS Reporting Rate	100%	95% or more
Indicator 5 HQS Quality Control	5%	5% or more
Indicator 9 Timely Reexaminations	100%	96% or more
Indicator 10 Correct Rent Calculations	100%	98% or more
Indicator 11 Pre-Contract HQS Inspections	100%	98% or more
Indicator 12 Annual HQS Inspections	100%	96% or more
Indicator 14 Family Self-Sufficiency		
FSS Enrollment      41 (4 Mandatory)	1025%	80% or more
FSS Escrow Account   28	68%	30% or more

### HCV Department YTD Rates

FY 2024	Allocation	HCV	VASH	HTS	226	MC	GG	Total	Lease-Up Rate	Funds Utilization Rate
8/01/2023	941	497	12	33	5	48	111	706	75%	98%
9/01/2023	941	495	14	33	5	48	111	706	75%	99%
10/01/2023	941	502	13	33	5	49	112	714	76%	100%
11/01/2023	941	500	13	33	5	49	113	713	76%	100%
12/1/2023	941	501	13	33	5	48	113	713	76%	101%
1/1/2024	941	509	13	33	5	49	113	722	77%	105%
2/1/2024	941	519	13	31	5	50	115	733	78%	104%
3/1/2024	941	530	13	32	5	50	112	742	79%	104%
4/1/2024	951	534	13	33	5	46	101	732	77%	105%
5/1/2024	951	540	13	34	5	45	100	737	77%	105%
6/1/2024	951	547	14	35	5	43	98	742	78%	105%
7/1/2024	951	549	15	36	5	45	99	749	79%	105%

### *MGG Waiting List (As of June 1<sup>st</sup> when HCV took over)*

<b>Matthews Court</b>	<b>1BR</b>	<b>2BR</b>			
On Waiting List	47	11			
Selected	12	0			
Referred to MGG	4	0			
<b>Garden Gilmore</b>	<b>1BR</b>	<b>2BR</b>	<b>3BR</b>	<b>4BR</b>	<b>5BR</b>
On Waiting List	73	43	12	2	1
Selected	0	9	8	1	0
Referred to MGG	0	3	2	1	0

## 7. Resident Services Program-July 2024 Activities

Programs/Services/Resources	FSS	Residents
Backpack Snacks	0	270
Credit/ Budgeting	1 -workshops	0
Transportation Assistance	0	0
Community Outreach	1 - workshops	1- workshop
Use of Community Center	0	0
Youth Services	0	2
Financial Education	0	0
Job Retention Activity	0	0
Individualized counseling	3	8

## 8. Development Report

### 9. New Business (See Attachments)

- A. Revision of HCV Payment Standards for 2025
- B. Revision to the Public Housing Flat Rents
- C. Revision of HCV Utility Allowances
- C. Public Housing Utility Allowances
- 10. Commissioners' Comments
- 11. Public Comments
- 12. Closed Session (If needed)
- 13. Adjournment





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[www.sha-nc.org](http://www.sha-nc.org)

## MEMORANDUM

TO: Board of Commissioners  
FROM: Marcus D. Goodson, Interim Chief Executive Officer  
THROUGH: Keren Nazario, Housing Choice Voucher Manager  
DATE: August 26, 2024  
SUBJECT: Resolution Approving the Revision of the Housing Choice Voucher Program Payment Standards Schedule

### I. STATEMENT OF ISSUE

The U.S. Department of Housing and Urban Development (HUD) publishes Fair Market Rents (FMRs) each year. The new FMRs changed for all bedroom sizes. In order to meet rent burden and spending utilization targets for the Housing Choice Voucher Program (HCVP), it is proposed to increase the Voucher Payment Standards (VPS) for Lee County and decrease the Voucher Payment Standards (VPS) for Harnett County.

### II. BACKGROUND

Under the HCVP, the VPS is used to establish the maximum rental subsidy permitted for participants in the program. Sanford Housing Authority (SHA) is authorized to establish a VPS that is no less than 90% and no more than 110% of the HUD published FMR (levels outside that range require the local field office approval).

In August 2024, HUD published updated FMRs for the fiscal year. In order to meet spending utilization goals for the program and maintain an optimal average rent burden level for participating families of 35% or less of their monthly adjusted income, The SHA is currently operating at 110% of the 2024 FMRs, staff recommends establishing VPS rates at 110% of the FMR for all bedroom unit sizes.

The following chart shows the proposed VPS rates for 0 through 4-bedroom dwelling units, along with comparative data for the current year.

**Lee County:**

Voucher Size	2024 FMR	2025 FMR	% Change	Current PS	Current Maximum PS as a % of 2025 FMR	Proposed PS 110% FMR	% Change (current PS vs proposed)
Efficiency	\$842	\$922	9.50%	\$926	110%	\$1,014	9.50%
1-bedroom	\$871	\$928	6.54%	\$958	110%	\$1,021	6.47%
2-bedroom	\$1,011	\$1,172	15.92%	\$1,112	110%	\$1,289	15.91%
3-bedroom	\$1,242	\$1,412	13.69%	\$1,366	110%	\$1,553	13.69%
4-bedroom	\$1,566	\$1,774	13.28%	\$1,722	110%	\$1,951	13.30%
Average			11.79%		110%		11.77%

**Harnett County:**

Voucher Size	2024 FMR	2025 FMR	% Change	Current PS	Current Maximum PS as a % of 2024 FMR	Proposed PS 110% FMR	% Change (current PS vs proposed)
Efficiency	\$851	\$791	-7.05%	\$936	110%	\$870	-7.05%
1-bedroom	\$857	\$796	-7.12%	\$942	110%	\$876	-7.01%
2-bedroom	\$1,126	\$1,044	-7.28%	\$1,238	110%	\$1,148	-7.27%
3-bedroom	\$1,587	\$1,463	-7.81%	\$1,745	110%	\$1,609	-7.79%
4-bedroom	\$1,911	\$1,753	-8.27%	\$2,102	110%	\$1,928	-8.28%
Average			-7.51%		110%		-7.48%

When approved, SHA will apply the new VPS rates in accordance with the regulations set forth at 24CFR 982.505. Specifically, SHA will apply the new payment standard immediately for new admissions, relocating participants, and for any participants remaining in their current unit when a new HAP contract is executed. For all other participants, SHA will apply the new rates at the next regular re-examination after approval of the new rates.

The reduced payment standard for Harnett County will be applied in accordance with 24 CFR 982.505. Specifically, SHA will apply a lower payment standard immediately to all new admissions, all movers and families remaining in their units with a new HAP contract. For all other participants, decreased payment standard amounts are not applied until the second regular reexamination after the payment standard is lowered.

**III. SUGGESTED MOTION**

I move that the Sanford Housing Authority Board of Commissioners approve the resolution to adopt the Housing Choice Voucher Program payment standard schedule identified as Attachment A, to become effective October 1, 2024.

**RESOLUTION APPROVING THE REVISION OF THE HOUSING CHOICE VOUCHER PROGRAM PAYMENT STANDARDS SCHEDULE**

**WHEREAS**, the U.S. Department of Housing and Urban Development publishes Fair Market Rents each year; the new Fair Market Rents changed for all bedroom sizes.

**WHEREAS**, the Sanford Housing Authority has determined that increased payment standards are necessary as an inducement to increase leasing and maximize funding utilization, and to meet rent-burden and spending utilization targets for the Housing Choice Voucher Program; and

**WHEREAS**, the Voucher Payment Standards are used to establish the maximum rental subsidy permitted for participants in the program; and

**WHEREAS**, the Sanford Housing Authority is authorized to establish Voucher Payment Standards no less than 90% of the published Fair Market Rents and no more than 110% of the published Fair Market Rents; and

**WHEREAS**, the proposed Voucher Payment Standards schedule is 110% of the published Fair Market Rents for all bedroom sizes; and

**WHEREAS**, the Voucher Payment Standards will become effective October 1, 2024.

**NOW, THEREFORE, BE IT RESOLVED** that the Board of Commissioners of the Sanford Housing Authority adopt the Voucher Payment Standards schedule for the Housing Choice Voucher Program as follows:

Lee County:

For Single Room Occupancy - \$761

For 0-bedroom units - \$1,014

For 1-bedroom units - \$1,021

For 2-bedroom units - \$1,289

For 3-bedroom units - \$1,553

For 4-bedroom units - \$1,951

Harnett County:

For Single Room Occupancy - \$653

For 0-bedroom units - \$870

For 1-bedroom units - \$876

For 2-bedroom units - \$1,148

For 3-bedroom units - \$1,609

For 4-bedroom units - \$1,928

Done this 26<sup>th</sup> day of August 2024.



## **RECORDING OFFICER'S CERTIFICATION**

I, Marcus D. Goodson, the duly appointed Secretary of the Sanford Housing Authority, do hereby certify that this resolution was properly adopted at a regular meeting of the Sanford Housing Authority held on August 26, 2024.

(SEAL)

By: \_\_\_\_\_  
Marcus D. Goodson, Secretary

**ATTACHMENT A**  
**Housing Choice Voucher Revised Payment Standards**  
**Effective October 1, 2024**

**LEE COUNTY**

Voucher Size	2024 FMR	2025 FMR	% Change	Current PS	Current Maximum PS as a % of 2025 FMR	Proposed PS 110% FMR	% Change (current PS vs proposed)
Efficiency	\$842	\$922	9.50%	\$926	110%	\$1,014	9.50%
1-bedroom	\$871	\$928	6.54%	\$958	110%	\$1,021	6.47%
2-bedroom	\$1,011	\$1,172	15.92%	\$1,112	110%	\$1,289	15.91%
3-bedroom	\$1,242	\$1,412	13.69%	\$1,366	110%	\$1,553	13.69%
4-bedroom	\$1,566	\$1,774	13.28%	\$1,722	110%	\$1,951	13.30%
Average			11.79%		110%		11.77%

**HARNETT COUNTY**

Voucher Size	2024 FMR	2025 FMR	% Change	Current PS	Current Maximum PS as a % of 2024 FMR	Proposed PS 110% FMR	% Change (current PS vs proposed)
Efficiency	\$851	\$791	-7.05%	\$936	110%	\$870	-7.05%
1-bedroom	\$857	\$796	-7.12%	\$942	110%	\$876	-7.01%
2-bedroom	\$1,126	\$1,044	-7.28%	\$1,238	110%	\$1,148	-7.27%
3-bedroom	\$1,587	\$1,463	-7.81%	\$1,745	110%	\$1,609	-7.79%
4-bedroom	\$1,911	\$1,753	-8.27%	\$2,102	110%	\$1,928	-8.28%
Average			-7.51%		110%		-7.48%



# FY 2025 FAIR MARKET RENT DOCUMENTATION SYSTEM

## The FY 2025 Lee County, NC FMRs for All Bedroom Sizes

**Final FY 2025 & Final FY 2024 FMRs By Unit Bedrooms**

Year	Efficiency	One-Bedroom	Two-Bedroom	Three-Bedroom	Four-Bedroom
FY 2025 FMR	\$922	\$928	\$1,172	\$1,412	\$1,774
FY 2024 FMR	\$842	\$871	\$1,011	\$1,242	\$1,566

Lee County, NC is a non-metropolitan county.

### Fair Market Rent Calculation Methodology

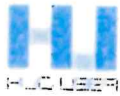
*Show/Hide Methodology Narrative*

Fair Market Rents for metropolitan areas and non-metropolitan areas developed as follows:

- Calculate the Base Rent:** HUD uses 2018-2022 5-year American Community Survey (ACS) estimates of 2-bedroom adjusted standard quarterly rents calculated for each FMR area as the new basis for FY2025, provided the estimate is statistically reliable. For FY2025, the test for reliability is whether the margin of error for the estimate is less than 50% of the estimate itself. If the estimate is based on at least 100 survey cases, HUD does not require a minimum number of survey cases, but rather a categorical variable known as the "RENT" indicator indicating a range of cases. An estimate based on a "RENT" value of 4 corresponds to a count indicator of 4 or higher.

If an area does not have a reliable 2018-2022 5-year estimate of 2-bedroom adjusted standard quarterly rents, whether the area has had at least 2 minimally reliable estimates in the past 5 years, or estimates that meet the 50% margin of error test, so, the FY2025 base rent is the average of the inflated ACS estimates for the area's corresponding metropolitan area and the State non-metropolitan area as the basis for FY2025.

If an area has not had a minimally reliable estimate in the past 5 years, HUD uses the estimate for the area's corresponding metropolitan area and the State non-metropolitan area as the basis for FY2025.



# FY 2025 FAIR MARKET RENT DOCUMENTATION SYSTEM

## The FY 2025 Harnett County, NC HUD Metro FMR Area FMRs for All Bedroom Sizes

### Final FY 2025 & Final FY 2024 FMRs By Unit Bedrooms

Year	Efficiency	One-Bedroom	Two-Bedroom	Three-Bedroom	Four-Bedroom
FY 2025 FMR	\$791	\$796	\$1,044	\$1,463	\$1,753
FY 2024 FMR	\$851	\$857	\$1,126	\$1,587	\$1,911

Harnett County, NC is part of the Harnett County, NC HUD Metro FMR Area, which consists of the following counties: Harnett County, NC. All information here applies to the entirety of the Harnett County, NC HUD Metro FMR Area.

### Fair Market Rent Calculation Methodology

*Show/Hide Methodology Narrative*

Fair Market Rents for metropolitan areas and non-metropolitan FMR follows:

- Calculate the Base Rent:** HUD uses 2018-2022 5-year American (ACS) estimates of 2-bedroom adjusted standard quality gross income for each FMR area as the new basis for FY2025, provided the estimate is reliable. For FY2025, the test for reliability is whether the margin of error estimate is less than 50% of the estimate itself and whether the estimate is based on at least 100 survey cases. HUD does not receive the exact survey cases, but rather a categorical variable known as the count indicator of cases. An estimate based on at least 100 cases corresponds to a count indicator of 4 or higher.

If an area does not have a reliable 2018-2022 5-year estimate, the area has had at least 2 minimally reliable estimates in the past 3 years, the base rent is the average of the inflated ACS estimates.

If an area has not had a minimally reliable estimate in the past 3 years, HUD uses the estimate for the area's corresponding metropolitan area (if applicable) or State non-metropolitan area as the basis for FY2025.

- Calculate the Basis for Recent Mover Adjustment Factor:** HUD calculates a recent mover adjustment factor by comparing an ACS 2022 1-year 40th percentile





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## MEMORANDUM

TO: Board of Commissioners  
FROM: Marcus D. Goodson, <sup>MOG</sup>Interim Chief Executive Officer  
DATE: August 20, 2024  
SUBJECT: Resolution Approving the Revision to the Public Housing Flat Rents

### I. STATEMENT OF ISSUE

The Sanford Housing Authority (SHA) is requesting approval of a change in the Public Housing Flat Rents.

### II. BACKGROUND

The Quality Housing and Work Responsibility Act (QHWRA) of 1998 provides the enabling legislation to offer Flat Rents (based on the area FMR) or Income-based Rents (based on family income) to public housing residents. The U. S. Department of Housing and Urban Development has provided regulations to housing authorities to establish Flat Rents. (24 CFR 960.253)

SHA will set the Flat Rent amounts following HUD requirements that Flat Rents will be set no less than 80% of the applicable Fair Market Rents (FMR). The new Flat Rents will apply to all new admissions effective October 1, 2024. The new Flat Rent amounts will be offered to all public housing occupant at their next annual renewal.

### III. RECOMMENDATION

It is recommended that the Board of Commissioners consider and approves the proposed Flat Rents for the Public Housing program to become effective October 1, 2024.

**RESOLUTION NO. \_\_\_\_\_**

**RESOLUTION APPROVING THE ANNULA UPDATE TO THE PUBLIC HOUSING PROGRAM FLAT RENTS**

**WHEREAS**, the Sanford Housing Authority Public Housing Program is required to establish, maintain and offer tenants a choice of Flat Rents or income base rent. 24 CFR 960.253 and

**WHEREAS**, the QHWRA of 1998 provides legislation to offer Flat Rents; and

**WHEREAS**, the Sanford Housing Authority must review its Flat Rents annually to ensure that Flat Rents continue to mirror market rent values; and

**WHEREAS**, the Sanford Housing Authority has completed its annual review of its Flat Rents and has determined that adjustments are needed; and

**WHEREAS**, THE REVISED Flat Rent Schedule is attached to Attachment A.

**NOW, THEREFORE, BE IT RESOLVED** by the Board of Commissioners of the Sanford Housing Authority, as follows:

1. That the revised Flat Rent Schedule identified in Attachment A be adopted and incorporated into the Admissions and Continued Occupancy Policy (ACOP) and implemented as set forth in the ACOP.
2. That the revised Flat Rent Schedule is effective October 1, 2024.

Done this 26<sup>th</sup> day of August 2024.

**RECORDING OFFICER'S CERTIFICATION**

I, Marcus D. Goodson, the duly appointed Secretary of the Sanford Housing Authority, do hereby certify that this resolution was properly adopted at the regular meeting of the Board of Commissioners of the Sanford Housing Authority held on August 26, 2024.

(SEAL)

**BY:** \_\_\_\_\_  
Marcus D. Goodson, Secretary

## HUD Published Fair Market Rents

### The FY 2025 Lee County, NC FMRs for All Bedroom Sizes

Final FY 2025 & Final FY 2024 FMRs By Unit Bedrooms					
Year	<a href="#">Efficiency</a>	<a href="#">One-Bedroom</a>	Two-Bedroom	<a href="#">Three-Bedroom</a>	<a href="#">Four-Bedroom</a>
FY 2025 FMR	\$922	\$928	\$1,172	\$1,412	\$1,774
<a href="#">FY 2024 FMR</a>	\$842	\$871	\$1,011	\$1,242	\$1,566

### PUBLIC HOUSING FLAT RENTS EFFECTIVE DATE: 10/01/2024

	Linden Heights	Utley Plaza	Foushee Heights	Harris Court
0 - Bedroom	\$740	\$740		
1 - Bedroom	\$745	\$745	\$745	\$745
2 - Bedroom	\$940	\$940	\$940	\$940
3 - Bedroom	\$1130	\$1130	\$1130	
4 - Bedroom	\$1420			





317 Chatham Street  
P.O. Box 636  
Sanford, NC 27331  
919-776-7655  
[www.sha-nc.org](http://www.sha-nc.org)

## MEMORANDUM

TO: Board of Commissioners  
FROM: Marcus D. Goodson, Interim Chief Executive Officer *MDG*  
THROUGH: Keren Nazario, Housing Choice Voucher Manager  
DATE: August 26, 2024  
SUBJECT: Resolution Approving the Revision to the Housing Choice Voucher Program Utility Allowances

### I. STATEMENT OF ISSUE

The Sanford Housing Authority (SHA) is requesting approval of a change in the utility allowances used for the Housing Choice Voucher Program.

### II. BACKGROUND

Federal regulations require a PHA to review its schedule of utility allowances each year and revise its allowance for a utility category if there has been a change of 10 percent or more in the utility rate since the last time the utility allowance schedule was revised.

Section 242 of the 2014 Appropriations Act limits the utility allowance payment for tenant-based vouchers to the family unit size for which voucher is issued, irrespective of the size of the unit rented by the family, with an exemption for families with a person with disabilities.

The proposed utility allowance, shown in the attached documents, were established based on typical costs of utilities and services paid by energy-conservative households that occupy housing of similar size and type in the same locality. In developing the schedule, the PHA is required to use normal patterns of consumption for the community as a whole and at current utility rates.

In the utility allowance schedule, the PHA is required to classify utilities and other housing services according to the following general categories: space heating, air conditioning, cooking, water heating, water, sewer, trash collection, other electric, refrigerator, range, and other specified housing services.

### III. RECOMMENDATION

It is recommended that the Board of Commissioners considers and approves the proposed utility allowances and that they become effective October 1, 2024.

RESOLUTION NO. \_\_\_\_\_

**RESOLUTION APPROVING THE REVISION TO THE HOUSING CHOICE  
VOUCHER PROGRAM UTILITY ALLOWANCES**

**WHEREAS**, the Sanford Housing Authority Voucher Program is required to establish and maintain a utility allowance schedule for all tenant-paid utilities, for cost of tenant-supplied refrigerators and ranges, and for other tenant-paid housing services; and

**WHEREAS**, on behalf of the Sanford Housing Authority, The Nelrod Group performed an analysis to determine if an adjustment to the current utility allowance schedule was needed; and

**WHEREAS**, the Sanford Housing Authority must review its schedule of utility allowance schedule annually, and must revise its allowances at other times when there has been a of 10 percent or more in the utility rates or fuel costs since the last revision of the schedule; and

**WHEREAS**, it was determined from the analysis that the average change in utility costs have changed in excess of the 10 percent threshold; and

**WHEREAS**, the Utility Allowance Schedules are used to determine the rental subsidy permitted for program participants; and

**WHEREAS**, the proposed Utility Allowance Schedules will become effective October 1, 2024.

**NOW, THEREFORE, BE IT RESOLVED** by the Board of Commissioners of the Sanford Housing Authority, as follows:

1. That the proposed utility allowances, as attached, be approved; and
2. That the proposed utility allowances become effective October 1, 2024.

Done this 26<sup>th</sup> day of August 2024.

**RECORDING OFFICER'S CERTIFICATION**

I, Marcus D. Goodson, the duly appointed Secretary of the Sanford Housing Authority, do hereby certify that this resolution was properly adopted at the regular meeting of the Board of Commissioners of the Sanford Housing Authority held on August 26, 2024.

(SEAL)

**BY:** \_\_\_\_\_  
Marcus D. Goodson, Secretary

# Utility Allowance Schedule

See Public Reporting and Instructions on back.

U.S. Department of Housing and Urban  
Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Sanford Housing Authority, NC</b>		Unit Type: <b>Energy Efficient Multi-Family</b> (Apartment/Row House/Townhouse/Semi-Detached/Duplex)				Date (mm/dd/yyyy) <b>10/01/2024</b>	
Utility of Service (Lee County)	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$16.00	\$18.00	\$20.00	\$22.00	\$25.00	\$28.00
	Bottle Gas	\$61.00	\$69.00	\$82.00	\$90.00	\$98.00	\$110.00
	Electric <b>(Central)</b>	\$12.00	\$14.00	\$18.00	\$22.00	\$27.00	\$31.00
	Electric Heat Pump <b>(Central)</b>	\$10.00	\$12.00	\$14.00	\$16.00	\$18.00	\$20.00
	Fuel Oil						
Cooking	Natural Gas	\$2.00	\$3.00	\$4.00	\$5.00	\$6.00	\$9.00
	Bottle Gas	\$8.00	\$12.00	\$16.00	\$20.00	\$29.00	\$37.00
	Electric <b>(Central)</b>	\$5.00	\$5.00	\$8.00	\$10.00	\$12.00	\$15.00
Other Electric	<b>(Central)</b>	\$17.00	\$20.00	\$27.00	\$35.00	\$43.00	\$51.00
Air Conditioning	<b>(Central)</b>	\$7.00	\$8.00	\$12.00	\$15.00	\$18.00	\$22.00
Water Heating	Natural Gas	\$5.00	\$6.00	\$10.00	\$12.00	\$15.00	\$18.00
	Bottle Gas	\$20.00	\$29.00	\$41.00	\$49.00	\$61.00	\$78.00
	Electric <b>(Central)</b>	\$11.00	\$12.00	\$16.00	\$19.00	\$23.00	\$26.00
	Fuel Oil						
Water		<b>See Attached Water, Sewer, &amp; Trash Collection Schedule</b>					
Sewer							
Trash Collection							
<b>Other specify: Electric Charge \$37.29 (Central)</b>		\$37.00	\$37.00	\$37.00	\$37.00	\$37.00	\$37.00
<b>Other specify: Natural Gas Charge \$10.70</b>		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
					Air Conditioning		
					Water Heating		
Unit Address					Water		
					Sewer		
					Trash Collection		
					Other		
					Range/Microwave		
Number of Bedrooms					Refrigerator		
					Total		



adapted from form HUD-52667  
(04/2023)



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

U.S. Department of Housing and Urban

Development

Office of Public and Indian Housing

OMB Approval No. 2577-0169

(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

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Utility of Service (Lee County)	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Heating	Natural Gas	\$21.00	\$26.00	\$29.00	\$33.00	\$36.00	\$39.00	
	Bottle Gas	\$86.00	\$102.00	\$114.00	\$131.00	\$143.00	\$155.00	
	Electric <b>(Central)</b>	\$26.00	\$31.00	\$35.00	\$40.00	\$45.00	\$49.00	
	Electric Heat Pump <b>(Central)</b>	\$15.00	\$17.00	\$21.00	\$23.00	\$26.00	\$28.00	
	Fuel Oil							
Cooking	Natural Gas	\$2.00	\$3.00	\$4.00	\$5.00	\$6.00	\$9.00	
	Bottle Gas	\$8.00	\$12.00	\$16.00	\$20.00	\$29.00	\$37.00	
	Electric <b>(Central)</b>	\$5.00	\$5.00	\$8.00	\$10.00	\$12.00	\$15.00	
Other Electric	<b>(Central)</b>	\$25.00	\$29.00	\$40.00	\$52.00	\$63.00	\$75.00	
Air Conditioning	<b>(Central)</b>	\$6.00	\$7.00	\$15.00	\$23.00	\$31.00	\$39.00	
Water Heating	Natural Gas	\$6.00	\$9.00	\$12.00	\$15.00	\$19.00	\$23.00	
	Bottle Gas	\$29.00	\$37.00	\$49.00	\$61.00	\$82.00	\$94.00	
	Electric <b>(Central)</b>	\$13.00	\$16.00	\$20.00	\$24.00	\$29.00	\$33.00	
	Fuel Oil							
Water		<b>See Attached Water, Sewer &amp; Trash Collection Schedule</b>						
Sewer								
Trash Collection								
<b>Other specify: Electric Charge \$37.29 (Central)</b>		\$37.00	\$37.00	\$37.00	\$37.00	\$37.00	\$37.00	
<b>Other specify: Natural Gas Charge \$10.70</b>		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance		Allowance	
Head of Household Name					Heating			
					Cooking			
					Other Electric			
					Air Conditioning			
					Water Heating			
					Water			
Unit Address					Sewer			
					Trash Collection			
					Other			
Number of Bedrooms					Range / Microwave			
					Refrigerator			
					Total			



adapted from form HUD-52667

(04/2023)

The Nelrod Company 8/2024 Update

# Utility Allowance Schedule

See Public Reporting and Instructions on back.

U.S. Department of Housing and Urban  
Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
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Utility of Service (Lee County)	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Heating	Natural Gas	\$16.00	\$18.00	\$20.00	\$22.00	\$25.00	\$28.00	
	Bottle Gas	\$61.00	\$69.00	\$82.00	\$90.00	\$98.00	\$110.00	
	Electric <i>(Duke)</i>	\$14.00	\$17.00	\$22.00	\$27.00	\$32.00	\$37.00	
	Electric Heat Pump <i>(Duke)</i>	\$13.00	\$15.00	\$18.00	\$20.00	\$22.00	\$24.00	
	Fuel Oil							
Cooking	Natural Gas	\$2.00	\$3.00	\$4.00	\$5.00	\$6.00	\$9.00	
	Bottle Gas	\$8.00	\$12.00	\$16.00	\$20.00	\$29.00	\$37.00	
	Electric <i>(Duke)</i>	\$5.00	\$6.00	\$9.00	\$12.00	\$15.00	\$17.00	
Other Electric	<i>(Duke)</i>	\$20.00	\$24.00	\$33.00	\$42.00	\$51.00	\$60.00	
Air Conditioning	<i>(Duke)</i>	\$8.00	\$10.00	\$14.00	\$18.00	\$21.00	\$25.00	
Water Heating	Natural Gas	\$5.00	\$6.00	\$10.00	\$12.00	\$15.00	\$18.00	
	Bottle Gas	\$20.00	\$29.00	\$41.00	\$49.00	\$61.00	\$78.00	
	Electric <i>(Duke)</i>	\$13.00	\$15.00	\$19.00	\$23.00	\$27.00	\$31.00	
	Fuel Oil							
Water		See Attached Water, Sewer, & Trash Collection Schedule						
Sewer								
Trash Collection								
Other specify: Electric Charge \$16.64 (Duke)		\$17.00	\$17.00	\$17.00	\$17.00	\$17.00	\$17.00	
Other specify: Natural Gas Charge \$10.70		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	
Actual Family Allowances-May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance		
					Heating			
Head of Household Name					Cooking			
					Other Electric			
					Air Conditioning			
					Water Heating			
					Water			
					Sewer			
					Trash Collection			
Unit Address					Other			
					Range/Microwave			
					Refrigerator			
					Total			
Number of Bedrooms								



adapted from form HUD-52667  
(04/2023)



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	Bottle Gas	\$86.00	\$102.00	\$114.00	\$131.00	\$143.00	\$155.00	
	Electric <b>(Duke)</b>	\$32.00	\$37.00	\$43.00	\$49.00	\$54.00	\$60.00	
	Electric Heat Pump <b>(Duke)</b>	\$18.00	\$21.00	\$25.00	\$28.00	\$31.00	\$34.00	
	Fuel Oil							
Cooking	Natural Gas	\$2.00	\$3.00	\$4.00	\$5.00	\$6.00	\$9.00	
	Bottle Gas	\$8.00	\$12.00	\$16.00	\$20.00	\$29.00	\$37.00	
	Electric <b>(Duke)</b>	\$5.00	\$6.00	\$9.00	\$12.00	\$15.00	\$17.00	
Other Electric	<b>(Duke)</b>	\$29.00	\$35.00	\$48.00	\$62.00	\$75.00	\$89.00	
Air Conditioning	<b>(Duke)</b>	\$6.00	\$8.00	\$17.00	\$27.00	\$36.00	\$46.00	
Water Heating	Natural Gas	\$6.00	\$9.00	\$12.00	\$15.00	\$19.00	\$23.00	
	Bottle Gas	\$29.00	\$37.00	\$49.00	\$61.00	\$82.00	\$94.00	
	Electric <b>(Duke)</b>	\$16.00	\$19.00	\$24.00	\$29.00	\$34.00	\$39.00	
	Fuel Oil							
Water		<b>See Attached Water, Sewer &amp; Trash Collection Schedule</b>						
Sewer								
Trash Collection								
<b>Other specify: Electric Charge \$16.64 (Duke)</b>		\$17.00	\$17.00	\$17.00	\$17.00	\$17.00	\$17.00	
<b>Other specify: Natural Gas Charge \$10.70</b>		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance		
Head of Household Name					Heating			
					Cooking			
					Other Electric			
					Air Conditioning			
					Water Heating			
					Water			
					Sewer			
Unit Address					Trash Collection			
					Other			
					Range / Microwave			
Number of Bedrooms					Refrigerator			
					Total			



adapted from form HUD-52667  
(04/2023)



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

U.S. Department of Housing and Urban  
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	Electric Heat Pump (Central)	\$10.00	\$12.00	\$14.00	\$16.00	\$18.00	\$20.00
	Fuel Oil						
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	Bottle Gas	\$8.00	\$12.00	\$16.00	\$20.00	\$29.00	\$37.00
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Air Conditioning	(Central)	\$7.00	\$8.00	\$12.00	\$15.00	\$18.00	\$22.00
Water Heating	Natural Gas	\$5.00	\$6.00	\$10.00	\$12.00	\$15.00	\$18.00
	Bottle Gas	\$20.00	\$29.00	\$41.00	\$49.00	\$61.00	\$78.00
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	Fuel Oil						
Water		See Attached Water, Sewer, & Trash Collection Schedule					
Sewer							
Trash Collection							
Other specify: Electric Charge \$37.29 (Central)		\$37.00	\$37.00	\$37.00	\$37.00	\$37.00	\$37.00
Other specify: Natural Gas Charge \$10.70		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
Actual Family Allowances-May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
					Heating		
Head of Household Name					Cooking		
					Other Electric		
					Air Conditioning		
					Water Heating		
Unit Address					Water		
					Sewer		
					Trash Collection		
					Other		
					Range/Microwave		
Number of Bedrooms					Refrigerator		
					Total		



adapted from form HUD-52667  
(04/2023)

The Nelrod Company 8/2024 Update

# Utility Allowance Schedule

See Public Reporting and Instructions on back.

U.S. Department of Housing and Urban  
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Air Conditioning	(Central)	\$6.00	\$7.00	\$15.00	\$23.00	\$31.00	\$39.00
Water Heating	Natural Gas	\$6.00	\$9.00	\$12.00	\$15.00	\$19.00	\$23.00
	Bottle Gas	\$29.00	\$37.00	\$49.00	\$61.00	\$82.00	\$94.00
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	Fuel Oil						
Water		See Attached Water, Sewer & Trash Collection Schedule					
Sewer							
Trash Collection							
Other specify: Electric Charge \$37.29 (Central)		\$37.00	\$37.00	\$37.00	\$37.00	\$37.00	\$37.00
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Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
Actual Family Allowances-May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
					Heating		
Head of Household Name					Cooking		
					Other Electric		
					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
					Trash Collection		
Unit Address					Other		
					Range / Microwave		
Number of Bedrooms					Refrigerator		
					Total		



adapted from form HUD-52667  
(04/2023)

The Nelrod Company 8/2024 Update



# Utility Allowance Schedule

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U.S. Department of Housing and Urban  
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	Bottle Gas	\$8.00	\$12.00	\$16.00	\$20.00	\$29.00	\$37.00
	Electric ( <i>Duke</i> )	\$5.00	\$6.00	\$9.00	\$12.00	\$15.00	\$17.00
Other Electric	( <i>Duke</i> )	\$20.00	\$24.00	\$33.00	\$42.00	\$51.00	\$60.00
Air Conditioning	( <i>Duke</i> )	\$8.00	\$10.00	\$14.00	\$18.00	\$21.00	\$25.00
Water Heating	Natural Gas	\$5.00	\$6.00	\$10.00	\$12.00	\$15.00	\$18.00
	Bottle Gas	\$20.00	\$29.00	\$41.00	\$49.00	\$61.00	\$78.00
	Electric ( <i>Duke</i> )	\$13.00	\$15.00	\$19.00	\$23.00	\$27.00	\$31.00
	Fuel Oil						
Water		See Attached Water, Sewer, & Trash Collection Schedule					
Sewer							
Trash Collection							
Other specify: Electric Charge \$16.64 ( <i>Duke</i> )		\$17.00	\$17.00	\$17.00	\$17.00	\$17.00	\$17.00
Other specify: Natural Gas Charge \$10.70		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
Actual Family Allowances-May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
					Heating		
Head of Household Name					Cooking		
					Other Electric		
					Air Conditioning		
					Water Heating		
Unit Address					Water		
					Sewer		
					Trash Collection		
					Other		
Number of Bedrooms					Range/Microwave		
					Refrigerator		
					Total		



adapted from form HUD-52667  
(04/2023)

The Nelrod Company 8/2024 Update

# Utility Allowance Schedule

See Public Reporting and Instructions on back.

U.S. Department of Housing and Urban  
Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Sanford Housing Authority, NC</b>		Unit Type Energy Efficient (Detached House/Mobile Home/Manufactured Home)					Date (mm/dd/yyyy) 10/01/2024	
Utility of Service (Harnett County)	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Heating	Natural Gas	\$21.00	\$26.00	\$29.00	\$33.00	\$36.00	\$39.00	
	Bottle Gas	\$86.00	\$102.00	\$114.00	\$131.00	\$143.00	\$155.00	
	Electric (Duke)	\$32.00	\$37.00	\$43.00	\$49.00	\$54.00	\$60.00	
	Electric Heat Pump (Duke)	\$18.00	\$21.00	\$25.00	\$28.00	\$31.00	\$34.00	
	Fuel Oil							
Cooking	Natural Gas	\$2.00	\$3.00	\$4.00	\$5.00	\$6.00	\$9.00	
	Bottle Gas	\$8.00	\$12.00	\$16.00	\$20.00	\$29.00	\$37.00	
	Electric (Duke)	\$5.00	\$6.00	\$9.00	\$12.00	\$15.00	\$17.00	
Other Electric	(Duke)	\$29.00	\$35.00	\$48.00	\$62.00	\$75.00	\$89.00	
Air Conditioning	(Duke)	\$6.00	\$8.00	\$17.00	\$27.00	\$36.00	\$46.00	
Water Heating	Natural Gas	\$6.00	\$9.00	\$12.00	\$15.00	\$19.00	\$23.00	
	Bottle Gas	\$29.00	\$37.00	\$49.00	\$61.00	\$82.00	\$94.00	
	Electric (Duke)	\$16.00	\$19.00	\$24.00	\$29.00	\$34.00	\$39.00	
	Fuel Oil							
Water		See Attached Water, Sewer & Trash Collection Schedule						
Sewer								
Trash Collection								
Other specify: Electric Charge \$16.64 (Duke)		\$17.00	\$17.00	\$17.00	\$17.00	\$17.00	\$17.00	
Other specify: Natural Gas Charge \$10.70		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	
Actual Family Allowances-May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance		
Head of Household Name    Unit Address     Number of Bedrooms					Heating			
					Cooking			
					Other Electric			
					Air Conditioning			
					Water Heating			
					Water			
					Sewer			
					Trash Collection			
					Other			
					Range / Microwave			
					Refrigerator			
					Total			



adapted from form HUD-52667  
(04/2023)



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

U.S. Department of Housing and Urban  
Development

Office of Public and Indian Housing

OMB Approval No. 2577-0169

(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Sanford Housing Authority, NC</b>		Unit Type: <b>Energy Efficient Multi-Family</b> (Apartment/Row House/Townhouse/Semi-Detached/Duplex)				Date (mm/dd/yyyy) <b>10/01/2024</b>	
Utility of Service (Harnett County)	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$16.00	\$18.00	\$20.00	\$22.00	\$25.00	\$28.00
	Bottle Gas	\$61.00	\$69.00	\$82.00	\$90.00	\$98.00	\$110.00
	Electric ( <i>South River</i> )	\$10.00	\$11.00	\$15.00	\$18.00	\$21.00	\$25.00
	Electric Heat Pump( <i>South River</i> )	\$8.00	\$10.00	\$12.00	\$13.00	\$15.00	\$16.00
	Fuel Oil						
Cooking	Natural Gas	\$2.00	\$3.00	\$4.00	\$5.00	\$6.00	\$9.00
	Bottle Gas	\$8.00	\$12.00	\$16.00	\$20.00	\$29.00	\$37.00
	Electric ( <i>South River</i> )	\$4.00	\$4.00	\$6.00	\$8.00	\$10.00	\$12.00
Other Electric	( <i>South River</i> )	\$14.00	\$17.00	\$23.00	\$29.00	\$36.00	\$42.00
Air Conditioning	( <i>South River</i> )	\$6.00	\$7.00	\$10.00	\$13.00	\$16.00	\$18.00
Water Heating	Natural Gas	\$5.00	\$6.00	\$10.00	\$12.00	\$15.00	\$18.00
	Bottle Gas	\$20.00	\$29.00	\$41.00	\$49.00	\$61.00	\$78.00
	Electric ( <i>South River</i> )	\$9.00	\$10.00	\$13.00	\$16.00	\$19.00	\$22.00
	Fuel Oil						
Water		See Attached Water, Sewer, & Trash Collection Schedule					
Sewer							
Trash Collection							
Other specify: Electric Charge \$34.08 ( <i>South River</i> )		\$34.00	\$34.00	\$34.00	\$34.00	\$34.00	\$34.00
Other specify: Natural Gas Charge \$10.70		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
Actual Family Allowances-May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
					Heating		
Head of Household Name					Cooking		
					Other Electric		
Unit Address					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
					Trash Collection		
Number of Bedrooms					Other		
					Range/Microwave		
					Refrigerator		
					Total		



adapted from form HUD-52667

(04/2023)

The Nelrod Company 8/2024 Update



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

U.S. Department of Housing and Urban  
Development  
Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Sanford Housing Authority, NC</b>		Unit Type <b>Energy Efficient Single-Family</b> (Detached House/Mobile Home/Manufactured Home)				Date (mm/dd/yyyy) <b>10/01/2024</b>	
Utility of Service (Harnett County)	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$21.00	\$26.00	\$29.00	\$33.00	\$36.00	\$39.00
	Bottle Gas	\$86.00	\$102.00	\$114.00	\$131.00	\$143.00	\$155.00
	Electric ( <i>South River</i> )	\$21.00	\$25.00	\$29.00	\$32.00	\$36.00	\$40.00
	Electric Heat Pump( <i>South River</i> )	\$12.00	\$14.00	\$17.00	\$19.00	\$21.00	\$23.00
	Fuel Oil						
Cooking	Natural Gas	\$2.00	\$3.00	\$4.00	\$5.00	\$6.00	\$9.00
	Bottle Gas	\$8.00	\$12.00	\$16.00	\$20.00	\$29.00	\$37.00
	Electric ( <i>South River</i> )	\$4.00	\$4.00	\$6.00	\$8.00	\$10.00	\$12.00
Other Electric	( <i>South River</i> )	\$21.00	\$24.00	\$34.00	\$43.00	\$53.00	\$62.00
Air Conditioning	( <i>South River</i> )	\$5.00	\$6.00	\$13.00	\$20.00	\$27.00	\$34.00
Water Heating	Natural Gas	\$6.00	\$9.00	\$12.00	\$15.00	\$19.00	\$23.00
	Bottle Gas	\$29.00	\$37.00	\$49.00	\$61.00	\$82.00	\$94.00
	Electric ( <i>South River</i> )	\$11.00	\$13.00	\$17.00	\$20.00	\$24.00	\$27.00
	Fuel Oil						
Water		See Attached Water, Sewer & Trash Collection Schedule					
Sewer							
Trash Collection							
Other specify: Electric Charge \$34.08 ( <i>South River</i> )		\$34.00	\$34.00	\$34.00	\$34.00	\$34.00	\$34.00
Other specify: Natural Gas Charge \$10.70		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
Actual Family Allowances-May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
Unit Address					Trash Collection		
					Other		
					Range / Microwave		
Number of Bedrooms					Refrigerator		
					Total		



adapted from form HUD-52667  
(04/2023)



317 Chatham Street  
P.O. Box 636  
Sanford, NC 27330  
919-776-7655  
[www.sha-nc.org](http://www.sha-nc.org)

## MEMORANDUM

TO: Board of Commissioners  
FROM: Marcus D. Goodson, Interim Chief Executive Officer *MDG*  
DATE: August 20, 2024  
SUBJECT: Resolution Approving the Public Housing Utility Allowances

### I. STATEMENT OF ISSUE

The Sanford Housing Authority (SHA) is requesting approval of the 2024 utility allowances used for the Public Housing Program. The 2024 utility allowances did not change more than 10% from the 2023 utility allowance study therefore there is no change in utility allowance amounts.

### II. BACKGROUND

Federal regulations (24 CFR 965.507 (b)) require a PHA to review its schedule of utility allowances each year and revise its allowance for a utility category if there has been a change of 10 percent or more in the utility rate since the last time the utility allowance schedule was revised.

The proposed utility allowances, shown in the attached documents, were established based on typical costs of utilities and services paid by energy-conservative households that occupy housing of similar size and type in the same locality. In developing the schedule, the PHA is required to use normal patterns of consumption for the community as a whole and at current utility rates. This study was conducted in compliance with the Public Housing Utility Allowance HUD Regulations 24 CFR 965, Subpart E – Residential Allowance for Utilities.

In the utility allowance schedule, the PHA is required to classify utilities and other housing services according to the following general categories: space heating, air conditioning, cooking, water heating, water, sewer, trash collection, other electric, refrigerator, range, and other specified housing services.

### III. RECOMMENDATION

It is recommended that the Board of Commissioners considers and approves the proposed utility allowances and that they become effective October 1, 2024.

**RESOLUTION NO. \_\_\_\_\_**

**RESOLUTION APPROVING THE REVISION TO THE PUBLIC HOUSING PROGRAM UTILITY ALLOWANCES**

**WHEREAS**, the Sanford Housing Authority Public Housing Program is required to establish and maintain a utility allowance schedule for all tenant-paid utilities, for cost of tenant-supplied refrigerators and ranges, and for other tenant-paid housing services; and

**WHEREAS**, on behalf of the Sanford Housing Authority, The Nelrod Group performed an analysis to determine if an adjustment to the current utility allowance schedule was needed; and

**WHEREAS**, the Sanford Housing Authority must review its schedule of utility allowance schedule annually, and must revise its allowances at other times when there has been a of 10 percent or more in the utility rates or fuel costs since the last revision of the schedule; and

**WHEREAS**, it was determined from the analysis that the average change in utility costs have not changed in excess of the 10 percent threshold; and

**WHEREAS**, the Utility Allowance Schedules are used to determine the rental subsidy permitted for program participants; and

**WHEREAS**, the proposed Utility Allowance Schedules will become effective October 1, 2024.

**NOW, THEREFORE, BE IT RESOLVED** by the Board of Commissioners of the Sanford Housing Authority, as follows:

1. That the proposed utility allowances, as attached, be approved; and
2. That the proposed utility allowances become effective October 1, 2024.

Done this 26<sup>th</sup> day of August 2024.

**RECORDING OFFICER'S CERTIFICATION**

I, Marcus D. Goodson, the duly appointed Secretary of the Sanford Housing Authority, do hereby certify that this resolution was properly adopted at the regular meeting of the Board of Commissioners of the Sanford Housing Authority held on August 28, 2024.

(SEAL)

**BY:** \_\_\_\_\_  
Marcus D. Goodson, Secretary

**NO 10% CHANGE SUPPORT DOCUMENTATION  
SURVEY AND STUDY RESULTS**



3301 West Fwy, 2<sup>nd</sup> Floor  
Fort Worth, TX 76107



Phone 817-922-9000  
Fax 817-922-9100

Email: ResidentLife@nelrod.com – Website: www.nelrod.com

August 20, 2024

Sherri Campanale, Chief Operating Officer  
Sanford Housing Authority  
1000 Carthage Street/PO Box 636  
Sanford, NC 27330

**Re: Public Housing Utility Allowances Annual Rate Review - 2024**

Dear Ms. Campanale:

ResidentLife Utility Allowances® has performed an annual review of the utility rates that your agency's Public Housing Utility Allowances are based on. We have enclosed the Comparison of Previous and Current Monthly Utility Rates charts and support documents. These charts indicate that there has not been a 10% change (increase or decrease) in local utility rates and charges since July 2023 (the date of the last Public Housing Utility Allowance Study and Survey). Therefore, per HUD regulations 24 CFR 965 Subpart E – Resident Allowances for Utilities (.507(b)) your agency is not required to adjust your current Public Housing Utility Allowance Schedule. Additionally, per your request, no adjustments were made.

HUD regulations (24CFR965-507(b)) continues that, "adjustments to resident payments as a result of such changes" (adjustments made due to a result of rate changes of 10% or more) "shall be retroactive to the first day of the month in which the last rate change taken into account in such revision became effective. Such rate changes shall not be subject to the sixty (60) day notice requirement of §965.502(c)."

ResidentLife Utility Allowances recommends that you have your Board of Commissioners readopt the existing Public Housing Utility Allowances with a new effective date for the current year. For your convenience, we changed the Compliance Seal to indicate 2024. This should be helpful during annual recertification and file reviews to indicate that you are using updated utility allowances. Additionally, keep the attached Comparison Chart for your records.

ResidentLife has made every effort to be as accurate as possible, but will not be held responsible for changes involving methodologies, rate structure, regulatory changes, and unusual and/or unique utility company rate calculations and results due to lack of information or data not provided by the utility companies.



Please review these charts for any identifiable problems, changes, corrections, and let me know if you have any changes or questions as soon as possible. If there are no changes requested to this report, then this report serves as the final draft as well. **Please see the attached Closure Acceptance Statement, sign and return as soon as possible.** You can contact me at (817) 922-9000 ext 101 or [cynthia@nelrod.com](mailto:cynthia@nelrod.com). It is a pleasure working with your agency and ResidentLife Utility Allowances will contact you about this time next year to see if we can be of service for your next annual review.

Sincerely,

*Cynthia Ramirez*

Cynthia Ramirez  
ResidentLife Utility Allowances® Specialist  
Enclosure

3301 West Fwy, 2<sup>nd</sup> Floor  
Fort Worth, TX 76107



Phone 817-922-9000  
Fax 817-922-9100

Email: ResidentLife@nelrod.com – Website: www.nelrod.com

## Closure Acceptance Statement

**Re: Public Housing Utility Allowances Annual Rate Review - 2024**

Upon signing this Closure Statement I, \_\_\_\_\_, on behalf of the **Sanford Housing Authority, NC** acknowledge receipt of the Comparison of Previous and Current Monthly Utility Rates for July 2023 and August 2024.

I, or a member of our agency staff, have reviewed these charts and have requested edits, changes or additions if needed. Our agency now accepts the Low-Rent Public Housing Utility Allowance Study as finished.

Signed

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

**Please sign and return within 30 days**  
**fax to: (817) 922-9100 or email to residentlife@nelrod.com**

**Job #2124-RU-022**

U:\2024\2024 Utility Allowances\2024 Agency Studies\Sanford, NC- Due 9-6\PH Update 2024\Sanford, NC-No Update Needed PH UA Transmittal Letter-Aug 2024.docx



# SANFORD HOUSING AUTHORITY, NC

## PUBLIC HOUSING Resident-Paid Utilities

### PROPOSED MONTHLY UTILITY ALLOWANCES

#### Chart 1

UPDATE 2024

#### Building Type: Row House/Townhouse & Semi-Detached/Duplex

<b>Foushee Heights</b> (EE Equip: WH,Ins,CFL)	OBR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A)			\$46.00	\$53.00		

#### Building Type: Semi-Detached/Duplex

<b>Utley Plaza</b> (EE Equip: WH,Ins,CFL)	OBR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A)		\$40.00	\$46.00	\$53.00		

#### Building Type: Row House/Townhouse

<b>Harris Court, Linden Heights</b> (EE Equip: Win)	OBR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A)	\$43.00	\$43.00	\$50.00	\$57.00		

#### Building Type: Semi-Detached/Duplex

<b>Harris Court, Linden Heights</b> (EE Equip: Win)	OBR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A)		\$43.00	\$50.00	\$57.00	\$64.00	

#### Building Type: Detached House

<b>Linden Heights (EE Equip: Win)</b>	OBR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A)					\$64.00	

A monthly average cost of the summer and winter adjustments were used for the electric and natural gas costs.

L&A= Lights & Appliances

H= Space Heating

WH= Water Heating

C= Cooking

EE Equip= Energy Efficient Equipment

Win= Windows

Ins= Insulation

CFL= 100% Fluorescent Lighting

**Note: Public Housing utility allowances are calculated similar to method used by each utility provider. These allowances are not calculated by end use (like the Section 8 HCV Program), but by total usage for each utility type. Utility providers' monthly charges are included in the calculations.**



## SANFORD HOUSING AUTHORITY, NC

### PUBLIC HOUSING

#### For Conversion to Resident-Paid Utilities

### PROPOSED MONTHLY UTILITY ALLOWANCES

#### Chart 2

UPDATE 2024

Building Type: Row House/Townhouse &  
Semi-Detached/Duplex

<b>Foushee Heights</b> (EE Equip: WH,Ins,CFL)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A)			\$46.00	\$53.00		
Natural Gas (H,WH,C)			\$46.00	\$52.00		
<b>Totals</b>			<b>\$92.00</b>	<b>\$105.00</b>		

Building Type: Semi-Detached/Duplex

<b>Utlely Plaza</b> (EE Equip: WH,Ins,CFL)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A)		\$40.00	\$46.00	\$53.00		
Natural Gas (H,WH,C)		\$42.00	\$50.00	\$57.00		
<b>Totals</b>		<b>\$82.00</b>	<b>\$96.00</b>	<b>\$110.00</b>		

Building Type: Row House/Townhouse

<b>Harris Court, Linden Heights</b> (EE Equip: Win)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A)	\$43.00	\$43.00	\$50.00	\$57.00		
Natural Gas (H,WH,C)	\$35.00	\$40.00	\$48.00	\$53.00		
<b>Totals</b>	<b>\$78.00</b>	<b>\$83.00</b>	<b>\$98.00</b>	<b>\$110.00</b>		

A monthly average cost of the summer and winter adjustments were used for the electric and natural gas costs.

L&A= Lights & Appliances

H= Space Heating

WH= Water Heating

C= Cooking

EE Equip= Energy Efficient Equipment

Win= Windows

Ins= Insulation

CFL= 100% Fluorescent Lighting

**Note: Public Housing utility allowances are calculated similar to method used by each utility provider. These allowances are not calculated by end use (like the Section 8 HCV Program), but by total usage for each utility type. Utility providers' monthly charges are included in the calculations.**

**SANFORD HOUSING AUTHORITY, NC**  
**PUBLIC HOUSING**  
**For Conversion to Resident-Paid Utilities**

**Building Type: Semi-Detached/Duplex**

<b>Harris Court, Linden Heights</b> (EE Equip: Win)	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A)		\$43.00	\$50.00	\$57.00	\$64.00	
Natural Gas (H,WH,C)		\$43.00	\$51.00	\$58.00	\$63.00	
<b>Totals</b>		<b>\$86.00</b>	<b>\$101.00</b>	<b>\$115.00</b>	<b>\$127.00</b>	

**Building Type: Detached House**

<b>Linden Heights (EE Equip: Win)</b>	0BR	1BR	2BR	3BR	4BR	5BR
Electricity (L&A)					\$64.00	
Natural Gas (H,WH,C)					\$74.00	
<b>Totals</b>					<b>\$138.00</b>	





# SANFORD HOUSING AUTHORITY, NC

## PUBLIC HOUSING Check-Metered Utilities

### PROPOSED MONTHLY CONSUMPTION ALLOWANCES Chart 3

UPDATE 2024

Building Type: Row House/Townhouse &  
Semi-Detached/Duplex

<b>Foushee Heights</b> (EE Equip: WH,Ins,CFL)	OBR	1BR	2BR	3BR	4BR	5BR
Natural Gas (ccfs) (Wtd Avg) (H,WH,C)			30	35		

Building Type: Semi-Detached/Duplex

<b>Utlely Plaza (EE Equip: WH,Ins,CFL)</b>	OBR	1BR	2BR	3BR	4BR	5BR
Natural Gas (ccfs) (Wtd Avg) (H,WH,C)		27	33	39		

Building Type: Row House/Townhouse

<b>Harris Court, Linden Heights</b> (EE Equip: Win)	OBR	1BR	2BR	3BR	4BR	5BR
Natural Gas (ccfs) (Wtd Avg) (H,WH,C)	21	25	31	36		

Building Type: Semi-Detached/Duplex

<b>Harris Court, Linden Heights</b> (EE Equip: Win)	OBR	1BR	2BR	3BR	4BR	5BR
Natural Gas (ccfs) (Wtd Avg) (H,WH,C)		27	34	40	44	

Summer: May - October (6), Winter: November - April (6)

Seasons based on PSNC Energy's natural gas summer & winter months.

H= Space Heating

WH= Water Heating

C= Cooking

EE Equip= Energy Efficient Equipment

Win= Windows

Ins= Insulation

CFL= 100% Fluorescent Lighting

**Note:** Public Housing allowances are calculated similar to method used by each utility provider. These allowances are not calculated by end use (like the Section 8 HCV Program), but by total usage for each utility type.

# SANFORD HOUSING AUTHORITY, NC

## PUBLIC HOUSING Check-Metered Utilities

Building Type: Detached House

Linden Heights (EE Equip: Win)	0BR	1BR	2BR	3BR	4BR	5BR
Natural Gas (ccfs) (Wtd Avg) (H,WH,C)					53	

## **SUPPORT DOCUMENTATION**

## **UTILITY PROVIDER RATES AND CHARGES**



# SANFORD HOUSING AUTHORITY, NC

## PUBLIC HOUSING

### Utility Providers Residential Rates and Charges As of August 2024

#### ELECTRICITY

UPDATE 2024

Source: Duke Energy Progress (Lee County & Harnett County)

800-452-2777

www.duke-energy.com\*

Summer (May - September) (5)		RES	
Winter (October - April) (7)		RES	
Basic Customer Charge	Per Month	\$14.00	
REPS Adjustment	Per Month	\$1.55	
<b>Total Monthly Charges</b>	Per Month	<b>\$15.55</b>	
	<i>Summer</i>	<b>Tiers</b>	<b>All</b>
	<i>Winter</i>	<b>Tiers*</b>	<b>0 - 800      over 800</b>
Energy Charge (Summer)	Per KWH	0.11661	
Energy Charge (Winter)	Per KWH	0.11661	0.10661
Fuel & Fuel Related Adjustment*	Per KWH	0.0074	0.0074
Fuel & Fuel Related Adjustment* (EMF)	Per KWH	0.01193	0.01193
Deman Side Management DSM & EE*	Per KWH	0.00629	0.00629
RAL-2 Rider*	Per KWH	-0.00009	-0.00009
EDIT-4 Rider*	Per KWH	-0.00249	-0.00249
Joint Agency Asses Rider JAA*	Per KWH	0.00648	0.00648
Procurement Renewable Energy* (CPRE)	Per KWH	0.00013	0.00013
Customer Affordability* (CARE)	Per KWH	0.00157	0.00157
<b>Total Energy Charges (Summer)</b>	Per KWH	<b>0.14783</b>	
<b>Total Energy Charges (Winter)</b>	Per KWH	<b>0.14783</b>	<b>0.13783</b>
<b>Sales Tax</b>	% of Total	<b>7%</b>	
Year Round Weighted Average		RES	
	<b>Tiers*</b>	<b>0 - 800</b>	<b>over 800</b>
<b>Total Energy Charges (wtd avg)</b>	Per KWH	<b>0.14783</b>	<b>0.14116</b>

*Tiers were restructured. Energy charges are sesonal tiered*

#### NATURAL GAS

Source: PSNC Energy

877-776-2427

www.psncenergy.com\*

Summer (May - October) (6)		(101)	
Winter (November - April) (6)		(101)	
Facilities Charge	Per Month	\$10.00	
	<b>Tiers</b>	<b>All</b>	
Energy Charge (Summer)	Per Therm	<b>0.96529</b>	
Energy Charge (Winter)	Per Therm	<b>1.0485</b>	
Energy Charges (wtd avg)	Per Therm	<b>1.0069</b>	
Sales Tax	% of Total	<b>7%</b>	

## **UTILITY PROVIDER DOCUMENTATION**

**Sales and Use Tax Rates Effective July 1, 2024**

Listed below by county are the total (4.75% State rate plus applicable local rates) sales and use tax rates in effect:

<b>County</b>	<b>Rate</b>	<b>County</b>	<b>Rate</b>	<b>County</b>	<b>Rate</b>
Alamance	6.75%	Franklin	6.75%	Pamlico	6.75%
Alexander	7%	Gaston	7%	Pasquotank	7%
Alleghany	7%	Gates	6.75%	Pender	6.75%
Anson	7%	Graham	7%	Perquimans	6.75%
Ashe	7%	Granville	6.75%	Person	6.75%
Avery	6.75%	Greene	7%	Pitt	7%
Beaufort	6.75%	Guilford	6.75%	Polk	6.75%
Bertie	7%	Halifax	7%	Randolph	7%
Bladen	6.75%	Harnett	7%	Richmond	6.75%
Brunswick	6.75%	Haywood	7%	Robeson	7%
Buncombe	7%	Henderson	6.75%	Rockingham	7%
Burke	6.75%	Hertford	7%	Rowan	7%
Cabarrus	7%	Hoke	6.75%	Rutherford	7%
Caldwell	6.75%	Hyde	6.75%	Sampson	7%
Camden	6.75%	Iredell	6.75%	Scotland	6.75%
Carteret	6.75%	Jackson	7%	Stanly	7%
Caswell	6.75%	Johnston	6.75%	Stokes	6.75%
Catawba	7%	Jones	7%	Surry	7%
Chatham	7%	Lee	7%	Swain	7%
Cherokee	7%	Lenoir	6.75%	Transylvania	6.75%
Chowan	6.75%	Lincoln	7%	Tyrrell	6.75%
Clay	7%	Macon	6.75%	Union	6.75%
Cleveland	6.75%	Madison	7%	Vance	6.75%
Columbus	6.75%	Martin	7%	Wake	7.25%*
Craven	6.75%	McDowell	6.75%	Warren	6.75%
Cumberland	7%	Mecklenburg	7.25%*	Washington	7%
Currituck	6.75%	Mitchell	6.75%	Watauga	6.75%
Dare	6.75%	Montgomery	7%	Wayne	6.75%
Davidson	7%	Moore	7%	Wilkes	7%
Davie	6.75%	Nash	6.75%	Wilson	6.75%
Duplin	7%	New Hanover	7%	Yadkin	6.75%
Durham	7.5%*	Northampton	6.75%	Yancey	6.75%
Edgecombe	7%	Onslow	7%		
Forsyth	7%	Orange	7.5%*		

\* Includes the 0.50% transit county sales and use tax.

RESIDENTIAL SERVICE  
SCHEDULE RES

AVAILABILITY

This Schedule is available when electric service is used for domestic purposes in and about (1) a residential dwelling unit, including electric service used on a farm and in the preparation of the farm's products for market, or (2) a family care home. A residential dwelling unit served under this Schedule may be used as a boarding house, fraternity house, tourist home, or like establishment, provided such residential dwelling unit is one which ordinarily would be used as a private residence. A family care home is defined as a home with support and supervisory personnel that provides room and board, personal care and habilitation services in a family environment for not more than six resident handicapped persons. Detached garages, barns, or other structures that are primarily used for residential purposes that are located on the same premise as the separate residential dwelling unit may be served under any applicable Residential Schedule as of October 1, 2023.

Service under this Schedule is not available for processing (or handling) for market of farm products produced by others; for separately metered domestic or farm operations; for individual motors in excess of 10 HP (in exceptional cases, motors as large as 15 HP may be served upon approval by the Engineering Department); for commercial or industrial purposes; for other uses not specifically provided for by the provisions herein; or for resale service, except as provided for in Chapter 22 of the Commission Rules regarding the provision of electric service by landlords.

Nonfossil energy sources caused by acts of nature such as wind or solar are permitted as supplement to Customer's energy requirement provided Company is granted the right to install, operate, and monitor special equipment at Company's expense to measure Customer's load or any part thereof and to obtain any other data necessary to determine the operating characteristics and effects of the installation. In situations where special equipment is needed to assure safety, reliability, or metering accuracy, the installation of such equipment shall be at the Customer's expense.

APPLICABILITY

This Schedule is applicable to all electric service of the same available type supplied to Customer's premises at one point of delivery through one kilowatt-hour meter.

TYPE OF SERVICE

The types of service to which this Schedule is applicable are alternating current, 60 hertz, either single-phase 2 or 3 wires, or three-phase 4 wires, at Company's standard voltages of 240 volts or less.

MONTHLY RATE

I. For Single-Phase Service:

Service used during May - September

- A. Basic Customer Charge:  
\$14.00 per month
- B. Kilowatt-Hour Charge:  
11.661¢ per kWh for all kWh

Service used during October - April

- Basic Customer Charge:  
\$14.00 per month
- Kilowatt-Hour Charge:  
11.661¢ per kWh for the first 800 kWh  
10.661¢ per kWh for the additional kWh



II. For Three-Phase Service:

The bill computed for single-phase service plus \$9.00.

III. Riders

The following Riders are applicable to service supplied under this schedule. The currently approved cents/kWh rider increment or decrement must be added to the cents/kWh rates shown above to determine the monthly bill.

Leaf No. 601	Rider BA
Leaf No. 602	Rider JAA
Leaf No. 604	Rider EDIT-4
Leaf No. 605	Rider CPRE
Leaf No. 608	Rider RDM
Leaf No. 609	Rider ESM
Leaf No. 610	Rider PIM
Leaf No. 611	Rider CAR
Leaf No. 612	Rider RAL-2

IV. Renewable Energy Portfolio Standard (REPS) Adjustment:

The monthly bill shall include a REPS Adjustment based upon the revenue classification. Upon written request, only one REPS Adjustment shall apply to premises serving the same customer for all accounts of the same revenue classification. If a customer has accounts which serve in an auxiliary role to a main account on the same premises, no REPS charge should apply to the auxiliary accounts regardless of their revenue classification (see Leaf No. 601 Annual Billing Adjustments Rider BA).

V. Storm Securitization Charge:

A Storm Securitization charge will be added to the monthly bill based on the currently approved cents/kWh incremental rate as shown in the Storm Securitization Rider (Leaf No. 607 Rider STS).

SALES TAX

To the above charges will be added any applicable North Carolina Sales Tax.

PAYMENTS

Bills are due when rendered and are payable within 25 days from the date of the bill. If any bill is not so paid, Company has the right to suspend service in accordance with its Service Regulations. In addition, any bill not paid on or before the expiration of twenty-five (25) days from the date of the bill is subject to an additional charge of 1% per month as provided in Rule R12-9 of the Rules and Regulations of the North Carolina Utilities Commission.

CONTRACT PERIOD

The Contract Period shall not be less than one year.

## SUMMARY OF RIDER ADJUSTMENTS

The following is a summary of Rider Adjustments that must be added to the bill calculated on the applicable rate schedule in order to compute the bill. The factors shown below include revenue-related taxes and regulatory fees. More specific information concerning these Riders is contained in the applicable Rider listed below.

<u>Residential Service Schedules</u>	<u>cents</u> <u>/kWh</u>	<u>Effective</u> <u>Date</u>
Annual Billing Adjustments Rider BA		
Fuel and Fuel-Related Adjustment Rate	0.074	12/1/23
Fuel and Fuel-Related Adjustment Experience Modification Factor (EMF)	1.193	12/1/23
Demand Side Management DSM & EE Rate	0.629	1/1/24
Annual Billing Adjustments Rider BA - Net Adjustment	1.896	
RAL-2 Rider	-0.009	10/1/23
EDIT-4 Rider	-0.249	10/1/23
Joint Agency Asset Rider JAA	0.648	12/1/23
Competitive Procurement of Renewable Energy Rider CPRE	0.013	12/1/23
Customer Affordability Rider CAR	0.157	1/1/24
Residential Decoupling Mechanism Rider RDM	0.000	10/1/23
Earnings Sharing Mechanism Rider ESM	0.000	10/1/23
Performance Incentive Mechanism Rider PIM	0.000	10/1/23
<b>TOTAL cents/kWh</b>	<b>2.456</b>	

<u>Small General Service Schedules**</u>	<u>cents</u> <u>/kWh</u>	<u>Effective</u> <u>Date</u>
Annual Billing Adjustments Rider BA		
Fuel and Fuel-Related Adjustment Rate	0.187	12/1/23
Fuel and Fuel-Related Adjustment Experience Modification Factor (EMF)	1.052	12/1/23
Demand Side Management (DSM) Rate*	0.042	1/1/24
Energy Efficiency (EE) Rate*	0.345	1/1/24
Annual Billing Adjustments Rider BA - Net Adjustment	1.626	
RAL-2 Rider	-0.009	10/1/23
EDIT-4 Rider	-0.259	10/1/23
Joint Agency Asset Rider JAA	0.616	12/1/23
Competitive Procurement of Renewable Energy Rider CPRE	0.012	12/1/23
Earnings Sharing Mechanism Rider ESM	0.000	10/1/23
Performance Incentive Mechanism Rider PIM	0.000	10/1/23
<b>TOTAL cents/kWh</b>	<b>1.986</b>	

\* Qualifying customers who have opted out of the Company's DSM and/or EE Programs are not subject to the applicable DSM and EE Adjustment charges based on the individual customer's opt-out election. Refer to Leaf No. 601 Rider BA to determine the DSM and EE Adjustment amounts, if any, applicable to customers who have opted out.

\*\* The monthly bill for certain non-residential schedules includes the Customer Affordability Recovery (CAR) rider as a fixed charge per bill as noted in Leaf No. 611.

Summary of Rates and Charges			
<u>RATE SCHEDULE NO. AND DESCRIPTION</u>		<u>CHARGES (a)</u>	
101 -	<b>RESIDENTIAL SERVICE</b>		
	Facilities Charge	\$10.00	per month
	Winter Energy Charge – November through April	\$1.04850	per Therm
	Summer Energy Charge – May through October	\$0.96529	per Therm
102 -	<b>HIGH-EFFICIENCY RESIDENTIAL SERVICE</b>		
	Facilities Charge	\$10.00	per month
	Winter Energy Charge – November through April	\$0.93557	per Therm
	Summer Energy Charge – May through October	\$0.85236	per Therm
115 -	<b>UNMETERED LIGHTING SERVICE</b>		
	Facilities Charge	\$10.00	per month
	Winter Energy Charge – November through April	\$1.00073	per Therm
	Summer Energy Charge – May through October	\$0.91752	per Therm
125 -	<b>SMALL GENERAL SERVICE</b>		
	Facilities Charge	\$17.50	per month
	Energy Charge First 500	\$0.80359	per Therm
	Next 4,500	\$0.74055	per Therm
	All Over 5,000	\$0.67752	per Therm
126 -	<b>SMALL GENERAL SERVICE - COOLING</b>		
	Facilities Charge	\$30.00	per month
	Energy Charge	\$0.64411	per Therm
127 -	<b>HIGH-EFFICIENCY SMALL GENERAL SERVICE</b>		
	Facilities Charge	\$17.50	per month
	Energy Charge First 500	\$0.70045	per Therm
	Next 4,500	\$0.63741	per Therm
	All Over 5,000	\$0.57438	per Therm
135 -	<b>NATURAL GAS VEHICLE FUEL</b>		
	Energy Charge	\$0.72152	per Therm
	Energy Charge	\$0.909	per GGE (b)
140 -	<b>MEDIUM GENERAL SERVICE</b>		
	Facilities Charge	\$100.00	per month
	Energy Charge First 1,000	\$0.64837	per Therm
	All Over 1,000	\$0.58509	per Therm
145 -	<b>LARGE-QUANTITY GENERAL SERVICE</b>		
	Facilities Charge	\$300.00	per month
	Energy Charge First 15,000	\$0.47847	per Therm
	Next 15,000	\$0.45231	per Therm
	Next 15,000	\$0.42894	per Therm
	Next 15,000	\$0.39841	per Therm
	Next 1,000,000	\$0.37301	per Therm
	All Over 1,060,000	\$0.35228	per Therm

Issued by D. Russell Harris, Vice President and General Manager - Southern Distribution  
Issued on April 29, 2024  
Issued under North Carolina Utilities Commission Docket No. G-5, Sub 670

Effective May 1, 2024

## **COMPARISON OF PREVIOUS AND CURRENT UTILITY RATES**



## Comparison of Previous and Current Utility Rates

### PUBLIC HOUSING

### SANFORD HOUSING AUTHORITY, NC

**Note: Rates in bold text indicate changes and gray print indicates removal.**

(We use the absolute value of the changes which gives us the percentage of change. This is the best way to determine a 10% change in utility rates and charges.)

#### ELECTRIC

UPDATE 2024

<b>Duke Energy Progress (RES) (Lee &amp; Harnett County)</b>									
Description	Measure	Summer Rates		Winter Rates		Difference		Percentage	
		7/2023	8/2024	7/2023	8/2024	Summer	Winter	Summer	Winter
Total Monthly Charges	per month	\$15.55	\$15.55	\$15.55	\$15.55	\$0.00	\$0.00	0%	0%
Total Energy Charges (All) (0-800)	per kwh	0.15061	0.14783	0.14544	0.14783	-0.00278	0.00239	-2%	2%
<b>Total Energy Charges (over 800)</b>	per kwh			0.14544	0.13783	0.00000	-0.00761		-6%
Sales Tax	% of total	7%	7%	7%	7%	0.00	0.00	0%	0%

Summer Rates are single-tiered. Summer: May - September (5), Winter: October - April (7)

Tiers were restructured. Energy Charges are seasonal tiered.

#### NATURAL GAS

<b>PSNC Energy (101)</b>									
Description	Measure	Summer Rates		Winter Rates		Difference		Percentage	
		7/2023	8/2024	7/2023	8/2024	Summer	Winter	Summer	Winter
Facilities Charge	per month	\$10.00	\$10.00	\$10.00	\$10.00	\$0.00	\$0.00	0%	0%
Energy Charges	per therm	1.04849	0.96529	1.14033	1.04850	-0.08320	-0.09183	-8%	-9%
Sales Tax	% of total	7%	7%	7%	7%	0.00	0.00	0%	0%

Summer: May - October (6), Winter: November - April (6)