Norman Blumberg Apartments Senior Section 18 Relocation Plan

August 21

2015

U.S. DEPARTMENT OF HOUSING & URBAN DEVELOPMENTOFFICE OF PUBLIC HOUSING INVESTMENT OFFICE OF PUBLIC AND INDIAN HOUSINGPHILADELPHIA HOUSING AUTHORITY

Philadelphia Housing Authority
APPROVED
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Amended Language is highlighted in Yellow.

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Brief description of the Relocation (i.e. On-Site/Off-Site):	Off-site relocation
Estimated Start date of Relocation Moves Post award :	TBD

1. INTRODUCTION

1.1 Purpose

This Relocation Plan sets forth the policies and procedures to be utilized by the Philadelphia Housing Authority (PHA) for relocation of senior residents from Norman Blumberg Senior Tower.

1.2 Residents Right to Return

Residents that are temporarily relocated retain the right to return to the property once construction has been completed and the unit is in decent, safe and sanitary condition. The period during which residents may need to be temporarily relocated will be determined by the period of rehabilitation of the tower.

1.3 Objective

The objective of this plan is to minimize the hardships of relocation and to ensure that each resident moving due to the project activity is provided the full measure of assistance for which the resident is eligible.

Relocation will be necessary in order to achieve the level of capital improvements required while protecting the health and safety of residents. PHA is committed to a relocation process that focuses on the needs of individual households with the following goals:

- Minimize disruption to the affected households;
- Efficiently utilize and coordinate limited resources to relocate the households;
- Clearly communicate rights, benefits and responsibilities of all parties to the residents; and
- Follow all applicable statues and regulations at the federal and state levels including ensuring that residents are provided with all required moving assistance, other benefits and advisory support services.

1.4 Summary of the Project

The Norman Blumberg Apartment ("Blumberg") housing complex consists of three towers - two multifamily and one senior - and adjacent low-rise units. As part of a multiyear, comprehensive plan to transform both the Blumberg site and the surrounding neighborhood, PHA has received approval from the U.S. Department of Housing and Urban Development ("HUD") to demolish the two multifamily towers and adjacent low rise units under Section 18, and the units have been tagged in the Property Inventory Control ("PIC") system as pending demolition.

The pending demolition of the two multifamily towers and the low rise structures and relocation of their residents will have an enormous impact on the residents in the sole remaining Senior Tower.

All utility connections, including power, water and sewage for the Blumberg housing complex are managed through one of the multifamily towers. Therefore, the demolition of the multifamily towers will eliminate basic utilities for the entire Blumberg housing complex, including the Senior Tower. In addition to the loss of basic utilities, residents of the Senior

Tower have expressed strong concerns about their health and safety during the demolition of the multifamily towers and the construction of new units on the complex. The entire Blumberg housing complex site will be a construction zone for the next 18-24 months. Both residents and PHA are concerned that construction could cause critical delays to ambulances and medical personnel who regularly provide services to frail senior residents with serious mobility impairments. Also, despite planned mitigation efforts, PHA has significant concerns about air quality during construction and its potential impact on the many residents with respiratory conditions. PHA has met with residents of the senior building on multiple occasions to update them about the redevelopment plans for the Blumberg housing complex. The seniors have requested relocation prior to the demolition of the multifamily towers, which is scheduled for September of 2015.

Under normal circumstances, PHA would temporarily relocate the residents of the Senior Tower during the demolition and construction activities as described above and return the residents once the development activities are completed. However, in this case, the three separate but interrelated construction activities planned at the Blumberg site (i.e. (i) the demolition of the multifamily towers, (ii) the construction of 57 new affordable housing units as part of Phase I and (iii) the rehabilitation of the Senior Tower would require multiple moves of the same elderly residents. First, residents of the Senior Tower would have to be relocated Senior Tower to accomplish the demolition activities at the multifamily towers since the project requires several months for the separation and rerouting of the currently interconnected utility and water lines. Second, the seniors would then need to be moved back after the reconnection of the utilities. PHA would then need to conduct a third relocation of the same seniors when the renovations at the Senior Tower commence. A fourth and final move would be required when the senior residents return to the rehabilitated Senior Tower.

PHA believes that such a multiple move strategy would be harmful to senior residents, many of whom are frail and/or have mobility impairments and other disabilities. It would also be inefficient and costly. Based on discussions with the residents, PHA has determined – and the residents overwhelming concur - that the preferred relocation strategy should involve only one temporary relocation move to be scheduled in advance of the family tower demolition. Seniors will return on a permanent basis following completion of the rehabilitation of the Senior Tower. All of the seniors will have a right to return after the rehabilitation of the Senior Tower.

Blumberg Apartments Current Unit Mix

Unit Mix	Standard	504 Unit Designation (MM)	Total
1 Bedroom	71	19	90
0 Bedroom	4	0	4
Administrative Units (Resident Council Office)	2		2
Total	77	19	96

The rehabilitation of the senior building is one part of a transformation plan for the existing Blumberg public housing site and the surrounding Sharswood/Blumberg neighborhood that was developed through a broad-based planning process funded in part through a Choice Neighborhoods Planning grant. PHA will adhere to a one-for-one replacement of the units being demolished and build far more units in the surrounding neighborhood as part of the transformation for the Sharswood/Blumberg neighborhood. PHA will also be building 57 new units on the Blumberg site and on property immediately adjacent to the site, and will undertake additional rental and homeownership development at both on and off-site locations in future phases.

In addition to the housing components, the transformation effort will include:

- Investment in Human Capital, such as job training and employment
- Support of educational achievement
- Promotion of healthy living
- Revitalization of the Commercial Corridor

PHA is committed to returning residents affected by relocation under this plan to a neighborhood of choice, with decent quality affordable housing, a revived commercial corridor, high performing neighborhood schools and a strong social service system.

This Relocation Plan set forth the policies and procedures to be utilized by PHA for relocation of residents from the Norman Blumberg Senior Tower as a result of demolition of the existing multifamily towers, rehabilitation of the Senior Tower. PHA is providing assistance to the residents for this difficult transition. The assistance provided will include but not be limited to; tenant relocation benefits, services, moving assistance, and destinations to relocate the families. Respect and service are core values of PHA, and are foundational to the plan for relocating residents during the redevelopment process.

Access to affordable housing will continue seamlessly before and after relocation. Residents will be offered a Housing Choice Voucher, and PHA will provide support to all residents who qualify for the program or move to other units in PHA's portfolio. Relocation staff will help to locate

homes that are appropriate for each individual's living situation and current family composition. This will include ensuring that residents with disabilities who require accessible features and/or reasonable accommodations are relocated to units with the feature and accommodations they need.

Residents who temporarily relocate from Blumberg Apartments Senior Tower will do so with the assurance that they can return to the newly re-developed site as part of their Right to Return. PHA will grant every resident that is lease compliant an absolute right to return to the redeveloped Senior Tower. Returning residents, who maintain compliance with their lease, will not be subject to new restrictions or rescreening upon their return to the rehabbed Senior Tower and PHA will be providing moving assistance, other benefits and advisory support services as further defined below both for the initial relocation move and for their return move to the tower.

Ultimately, the success of the redevelopment will be measured in part by the positive change in our resident's lives. The revitalization of the Senior Tower and Blumberg site will not only provide new housing structures, it will create a neighborhood of choice for the residents of the Sharswood/Blumberg community. This plan details the responsible, sensible methods that the Philadelphia Housing Authority is employing to carry out relocation with the least possible disruption to current residents.

1.5 Definitions

A. Act - The United States Housing Act of 1937, as amended (42 U.S.C. 1401 et seq.)

B. AMI Area Median Income - Each year HUD publishes estimates of the median family income for every metropolitan area in the United States. The median income is adjusted by the number of household members and by factors like the minimum benefit level of Social Security payments so that any family's income can be compared to the area's median income. Different percentage levels of AMI define eligibility for different types of subsidy. Residents leasing from Philadelphia Housing Authority generally have incomes below 30 percent AMI.

C. Authority – The Philadelphia Housing Authority or PHA.

D. Advisory Support Services

E. Comparable Replacement Dwelling - The term "comparable replacement dwelling" as defined in the URA regulations refers to a housing that is offered to a relocating family that is equal in size and amenities to the unit being demolished.

F. Dislocation Allowance – A $100.00 payment to families who are required to move to cover a variety of miscellaneous costs.

G. Early Move – A voluntary move of a resident household after receipt of the written General Information Notice (GIN) but prior to receipt of the written Section 18 Notice of Relocation.

H. General Information Notice (GIN) - Informs affected persons of the project and that they may be displaced by the project.

I. Housing Choice Vouchers (HCV) – HCV increases affordable housing choices for very low-income families. Families with a Housing Choice voucher choose and lease safe, decent, and affordable privately-owned rental housing.

J. HUD - The United States Department of Housing and Urban Development

K. Ineligible Residents – A resident that is unlawfully occupying a unit shall not be eligible for relocation assistance

L. Ninety –day Notice (49 CFR 24.203(c)) - Informs displaced persons of the earliest date by which they will be required to move. This notice may not be issued unless a comparable replacement dwelling is available and the displaced person is informed of its location and has sufficient time to lease or purchase the property.

M. Notice of Relocation Eligibility (NOE) – Informs persons that they will be displaced by the project and establishes their eligibility for relocation assistance and payments.

N. PHA Section 18 Relocation Plan Draft for Public Posting- the final draft version of the plan that will be posted on PHA's website at www.pha.phila.gov.

O. Public Housing – Housing developed under Section 9 of the 1937 Housing Act governed by an Annual Contributions Contract (ACC) between HUD and PHA with restricted use pursuant to the Declaration of Trust (DOT) and includes the converted property listed in this relocation effort.

P. Rehabilitation - A construction program to make physical improvements to the property necessary to extend the development's long-term viability that may require residents to relocate.

Q. Relocation - Resident required moves as a result of the rehabilitation and construction project under the Public Housing component of the demonstration.

R. Relocation Housing - Housing those residents who are displaced from the redevelopment area move to during the relocation process. The relocation housing is off-site housing in other site locations in PHA's inventory, or in the private market.

S. Relocation Period - The period during which residents may need to be relocated, determined by the period of rehabilitation or construction and specific to each property.

T. Relocation Plan - The written document adopted by the Board of Commissioners of the Philadelphia Housing Authority that governs the policies and procedures to be utilized by PHA in the implementation of relocation and re-occupancy of rehabilitated housing units.

U. Right to Return - The right of Eligible Residents that are relocated to return to a property after completion of the rehabilitation and/or construction.

V. Relocation Assistance – All relocation assistance and payments required under URA and/or public housing and Section 18 requirements as applicable for relocation.

W. Section 18 – The Quality Housing Work Responsibility Act of 1998 (QHWRA) amended section 18 of the United States Housing Act of 1937 and provided new relocation requirements for some public housing demolition programs in lieu of URA. The URA is not applicable to public housing demolition projects which falls under the section 18 relocation requirements.

X. Unlawful Occupancy - Unlawful occupancy is: (1) occupancy by a person that has been ordered to move by a court of competent jurisdiction; (2) or, if the person's tenancy has been lawfully terminated by PHA for cause, the tenant has vacated the premises, and the termination was not undertaken for the purpose of evading relocation assistance obligations.

Y. URA - The Uniform Relocation Assistance and Real Property Acquisitions Policies Act of 1970, as amended; statute and implementing regulations at 49 CFR part 24.

Z. Permanent Relocation - Relocation option based on resident choice when relocation period will exceed 12 months and resident chooses not to proceed with extended temporary relocation as confirmed by written consent of resident, relinquishing their right to return.

AA. Voluntary Permanent Relocation Benefits - All relocation assistance and payments as required under URA.

1.6 References

The use of the words "tenant; resident; family; or, household" in this document shall be interchangeable and have the same meaning and context; and, whether used in the singular shall include the plural, and vice versa as the context may require

1.7. Applicable Legal Authority

All relocation policies, procedures and activities will be conducted in accordance with the applicable rules and regulations of the Section 18 program, HUD requirements and corresponding provisions of the laws to set forth in in the following:

- The Uniform Relocation Act (URA) (46 U.S.C. 4600 et seq.), its implementing regulations (49 C.F.R. Part 24),
- FHEO (Title VI of the Civil Rights Act of 1964, Section 504 of the rehabilitation act of 1973, Fair Housing Act)
- Violence against Women Reauthorization Act of 2005 (VAWA),
- Section 18 The Quality Housing Work Responsibility Act of 1998 (QHWRA)
- Equal Access to Housing Regardless of Sexual Orientation or Gender Identity Final Rule.
-
- All other applicable requirements and modifications of the above including new guidance or successor notices to the above issued by HUD as applicable.

These documents are available on the agency's website www.pha.phila.gov, in the latest news section. They are also available in paper copy, upon request, by contacting the PHA's Relocation Coordinator at 215-684-8024, 215-684-4763, and 215-684-3584.

In the event of changes, clarifications or additions to applicable legal authority which affect the content of this Relocation Plan, PHA will issue and post revisions to the Plan.

1.8 Non-Discriminatory Statement

Relocation services will ensure that displacement does not result in different or separate treatment of households based on race, nationality, color, religion, national origin, sex, sexual orientation, marital status, familial status, disability or any other basis protected by the federal Fair Housing Amendments Act, the Americans with Disabilities Act, Title VI of the Civil Rights Act of 1964, Title VII of the Civil Rights Act of 1964, Title VIII of the Civil Rights Act of 1968, and the Pennsylvania Human Relations Act, as well as any other arbitrary, or unlawful discrimination.

2. PROJECT SUMMARY

2.1 Preservation

Significant capital improvements are needed at the Blumberg Senior Tower to ensure its long term viability.

PHA plans to complete a rehabilitation of the Norman Blumberg Senior Tower. The rehabilitation will consist primarily of lobby renovations, major mechanical system upgrades and in-unit kitchen and bathroom upgrades. This Plan applies only to the Norman Blumberg Senior Tower site.

2.2 Project Structure

The property will undergo various levels of rehabilitation financed with private and public investment including tax exempt bonds; Low Income Housing Tax Credits; private mortgage proceeds, Replacement Housing Factor Funds, and other public funds.

From a financing standpoint, it should be noted that while the financing plan contemplates the use of 9% low income housing tax credits ("LIHTCs"); it is not dependent upon such credits. If PHA fails to be awarded 9% LIHTCs in the next round of applications, PHA will immediately apply for 4% LIHTCs and increase its capital contributions. Furthermore, if for some unforeseen circumstance, PHA cannot obtain an allocation of 4% LIHTCs, PHA has sufficient MTW funds to complete the project without credit assistance.

2.3 Level of Rehabilitation

Property rehabilitation will include construction work in common areas as well as individual apartments. It is anticipated that the level of rehabilitation to be completed in individual apartments will generally require residents to vacate the unit. Common area construction is generally expected to be completed while residents are relocated in temporary, off-site locations.

2.4 Minimizing Adverse Impact of Relocation

To minimize adverse effects of relocation on residents, every effort will be made to provide families with tenant relocation benefits, services, moving assistance, and housing options to relocate the families. Particular attention will be paid to ensuring that residents who require accessible housing and/or other reasonable accommodations are provided with the assistance needed to locate housing that meets their individual needs. Respect and service are core values of PHA, and are foundational to the plan for relocating residents during the redevelopment process.

2.5 Overall Project Timeline

The Rehabilitation of the Blumberg Senior Tower is estimated to be completed approximately 18 to 24 months following relocation of the residents. These dates are dependent on the complex layered financing to be utilized to complete the rehabilitation of each property, HUD and other approval timelines, and construction scheduling constraints. As a result, the dates may vary. PHA will keep residents and community stakeholders informed of schedule changes as they arise.

3.0 RELOCATION ASSISTANCE

3.1 Eligible Residents for Relocation Assistance

Any resident, legally residing at the project shall be considered eligible for relocation assistance under this plan. For purposes of this Relocation Plan, inasmuch as PHA is requesting early relocation of senior residents to (i) safely demolish the multifamily towers, (ii) commence work on the construction of Phase I (new construction of 57 RAD units at Blumberg) and (iii) to provide for the safety of the residents of the Senior Tower before and during construction activities at the site, therefore, PHA is guaranteeing that any eligible resident of the Senior Tower who is relocated as a result of these activities at Blumberg will be eligible for relocation assistance and a Right to Return.

3.1.1 Ineligible Residents

A resident that is unlawfully occupying a unit shall not be eligible for relocation assistance.
Unlawful occupancy is:

1. occupancy by a person that has been ordered to move by a court of competent jurisdiction; or,

2. if the person's tenancy has been lawfully terminated by PHA for cause, the tenant has vacated the premises, and the termination was not undertaken for the purpose of evading relocation assistance obligations; or,

3. by a person who is not the lease for a unit.

Relocation benefits including right of return shall be forfeited and/or terminated if a person that was initially determined eligible for relocation benefits is subsequently evicted through court action during the relocation period.

3.1.2 Changes in Household Composition

PHA will encourage residents to make changes in family composition as needed to comply with PHA policy, prior to the commencement of relocation. The PHA Section 18 Relocation Plan for Public Posting shall provide for PHA to approve the addition of household members pursuant to the requirements set forth in the Public Housing Admissions and Continued Occupancy Policy ("ACOP"). Generally, all requests for changes in household composition will be honored with the exception of individuals that are otherwise ineligible due to criteria stipulated in the ACOP.

Residents will be offered units based on the size of the household at the time of relocation. Changes in family composition post relocation will be based on the criteria set forth in either PHA's ACOP or Housing Choice Voucher Administrative Plan as applicable.

3.1.3 Provision of Assistance

Any resident who is relocated shall be provided relocation assistance including financial assistance, in accordance with the applicable law and regulations. The actual level of relocation

and financial assistance provided will be dependent on the relocation method applicable to each resident.

***Permanently Displaced Persons* -** The URA defines permanently displaced persons as a residents displaced from their current home to a relocation home for a period greater than one year. The rehabilitation of Blumberg Senior Apartments is expected to take approximately 18 to 24 months. PHA will guarantee each resident that is lease compliant during relocation an absolute "Right to Return" to the newly renovated Blumberg Senior Apartments.

Residents, who choose to waive their right of return, and opt to be permanently displaced under the provisions of the URA, will be given full rights and benefits under the URA for permanent displacement.

Residents subject to permanent displacement will be given the Notice of Eligibility for Assistance under Appendix E-9, which would inform the tenants of their rights under URA and their eligibility for full relocation benefits.

***Non-Displaced Persons* -**The URA requires that PHA inform residents who will not be displaced due to demolition via a "Notice of Non-Displacement", which may explain that displacement will occur in a future phase of relocation, with at least 18 months advance notice. PHA will not use this notice as all residents in the Blumberg Apartment family units will be relocated.

Languages – To ensure meaningful understanding of relocation plan and to minimize language barriers faced by residents who have limited English proficiency, PHA, in accordance with the Limited English Proficiency Policy, will provide a professional interpreter in person or through the "Language Line", which is PHA's interpretive services contractor that provides a three-way communication service allowing connection among PHA, its resident and a professional interpreter (see:www.lanaguageline.com) to interpret information that pertains to relocation or receipt of relocation benefits or housing search assistance for voucher recipients.

In addition, all significant written notices will be provided using the following languages: English; Spanish; Chinese; Russian; and, Vietnamese.

3.1.3.1. Needs Assessment

Prior to implementation of this plan, the Relocation Team will conduct an individual needs assessment for each affected household to determine their unique relocation needs. Information gathered during the assessment shall include at a minimum the information in the sample assessment form found in Appendix F to this plan.

3.1.3.2. Moving Assistance for Relocating Residents

Residents eligible for relocation will receive free assistance with the packing and physical move of their household to their relocation housing unit.

PHA will move the resident free of charge, which is consistent with 49 CFR 24.302, whereby PHA will undertake the move, contracting with an insured moving company, at no cost to the individual or family being displaced. The move will include the following:

- Assistance for all necessary moving services, including packing and unpacking of personal belongings, if requested.
- For tenants who prefer to pack their own personal possessions and items of value, PHA will provide packing instructions, boxes or reusable crates, markers, and tape.
- Storage of the personal property for a period not to exceed 12 months, unless the agency determines that a longer period is necessary. Items which could pose health and sanitation hazards, such as infested furniture, will not be stored.
- Disconnecting, dismantling, removing, reassembling, and reinstalling relocated household appliances and other personal property, including personal computer set-up.

The replacement value of property lost, stolen, or damaged in the process of moving (not through the fault or negligence of the displaced person, his or her agent, or employee) where insurance covering such loss, theft, or damage is not reasonably available

3.1.3.3. Relocation Destination

Residents will be offered choices for temporary relocation including an offer of either an HCV voucher (which may include the option for a unit in a Unit Based Voucher building subsidized by PHA) or an available unit within PHA's existing housing inventory. Residents who choose an HCV voucher will be provided with a detailed briefing on the range of housing options available to voucher holders as well as with housing search assistance. PHA will also prepare and periodically update a listing of available housing units within PHA's existing public housing inventory that will be reviewed with each household. The Senior Tower Relocation Staff will track vacant units in PHA's inventory each month during relocation in order to provide residents in the tower with housing choices.

Appendix L contains a listing of unit availability by bedroom size and location as of August ##, 2015. This listing will be updated periodically and reviewed with residents as part of the relocation planning process.

3.1.3.4. Relocation Housing Unit

Residents will be offered a choice of a Housing Choice Voucher an available unit within PHA's existing public housing inventory. Every effort will be made to provide residents with the greatest amount of time feasible to move to the relocation housing unit.

3.1.3.5. Determining priorities for choosing housing options

The search for relocation housing will take into account the size of unit a household needs, accessibility requirements, any special accommodation requests, and the preference for the type and location of housing. Relocation Staff will work to match each household's with relocation housing options available. For residents who select a HCV voucher, staff will provide housing search assistance. The following Priority Policy will determine which households choose their housing options first, thus determining the timing of each resident will move. The listing will determine priority of household moves by considering special accommodation needs and the intensity of social service needs.

3.1.3.5.a Priority Policy

The goals of the Relocation Plan is to inform the residents about their rights under the relocation laws and this Plan, provide suitable options for alternative housing to each household, and sufficient periods of time to make informed decisions from housing options provided. This Priority Policy assigns each household a priority ranking during the relocation process to guide the timing of their move from the Senior Tower to their alternative housing. The policy expresses the intent of the Philadelphia Housing Authority to limit the impact of relocation on the residents currently living in the Senior Tower.

This policy will provide ample support for seniors and persons with disabilities requiring consistent medical care with an offering of housing options to ensure continuity of all necessary care.

Households meeting the criteria set forth below will be given that according priority in selecting their housing options for relocation:

a) Residents residing in designated 504 accessible units will receive first priority;
b) All other residents will receive second priority.

Within each priority group, residents will be offered alternate housing units on a first-come-first-served basis.

3.1.4 Relocation Advisory Services

Additional information shall be provided for permanent relocation including:

- Availability and use of a Housing Choice Voucher; and
- Availability of replacement housing payments

Understanding of the relocation plan and to minimize language barriers faced by residents who have limited English proficiency, PHA will provide a professional interpreter (in person or through the Language Line) to interpret information that pertains to relocation or receipt of relocation benefits or housing search assistance for voucher recipients.
PHA will provide additional support to frail elderly and disabled residents. Relocation staff will work with senior and disabled services and the residents' families and support networks to help them understand their relocation options. If some residents are facing significant struggles with the need to relocate, staff will work closely with them to provide support in finding relocation housing that will support a successful tenancy.

Some residents who choose to use a **HCV** will have had little or no experience as voucher holders, and may be unfamiliar with renting in the private rental market. The Housing Choice Voucher Program will make available their Housing Counselor, Community Liaison, Owner Liaison and other staff to provide support in the housing search process. The Relocation Staff will work in collaboration with HCV staff to provide housing search and other assistance to facilitate resident success in using a voucher. In addition, briefing sessions will be offered to relocating residents so they can adequately assess their household's capacity to succeed in the

HCV Program. These classes address impediments related to lack of understanding or lack of experience with the private housing market and working with private landlords.

3.1.5 Housing Search Assistance

Within the City of Philadelphia, transportation services will be provided to view a minimum of two comparable replacement housing units offered to each resident. A comparable replacement unit is a unit that meets the federal Housing Quality Standards and is appropriate to the size of the family.

3.1.6 Permanent Relocation Moving Expenses within PHA Inventory

Residents who must move due to redevelopment will receive free assistance with the packing and physical move of their household to their relocation housing unit. PHA will provide the following services listed below.
Moving performed free of charge to resident consistent with 49 CFR 24.302, whereby PHA will undertake the move, contracting with an insured moving company, at no cost to the individual or family being displaced. This will include:

- Assistance for all necessary moving services, including packing and unpacking of personal belongings, if requested.
- For tenants who prefer to pack their own personal possessions and items of value, PHA will provide packing instructions, boxes or reusable crates, markers, and tape.
- Storage of the personal property for a period not to exceed 12 months, unless the agency determines that a longer period is necessary. Items which could pose health and sanitation hazards, such as infested furniture, will not be stored.
- Disconnecting, dismantling, removing, reassembling, and reinstalling relocated household appliances and other personal property, including personal computer set-up.
- The replacement value of property lost, stolen, or damaged in the process of moving (not through the fault or negligence of the displaced person, his or her agent, or employee) where insurance covering such loss, theft, or damage is not reasonably available.

3.1.8 Relocation Housing Options

A goal of the relocation process is that every displaced household can move to a unit that matches their housing preferences. Residents who must relocate due to redevelopment will be offered housing options in the following categories:

- Housing units that are elsewhere within PHA's inventory such as other public housing or scattered site housing;
- Housing units in the private market with assistance from Housing Choice Voucher (Housing Choice) Vouchers;
- Housing units in the private market with assistance from Replacement Housing Payments if the agency is otherwise unable to provide other subsidized relocation housing.

Some households may be qualified to pursue housing opportunities like homeownership. PHA offers information and assistance with pursuing homeownership as one component of its Community Operation & Resident Development department. These resources and information

will be made available to residents who may qualify for the program. In planned future stages of the project, homeownership opportunities are expected to result directly from the redevelopment of Norman Blumberg Apartments.

Every reasonable effort will be made to relocate residents to the neighborhood of their choice. PHA will seek resources in every community. If residents qualify for a voucher, they will be advised of housing opportunities in surrounding counties and in neighborhoods that they may not be familiar with and have low concentrations of poverty and minorities. Every reasonable effort will be made to encourage residents to explore alternative housing choices.

In addition, the PHA is collaborating with the City of Philadelphia Office of District Attorney. Department of Human Services and Department of Behavioral Health Services to ensure the safety of residents and continuity of services received before, during and after relocation.

3.1.9 Replacement Housing Payment ("RHP")

If it becomes necessary to house residents in temporary units other than a PHA unit, attempts will be made to find replacement housing. The replacement housing payment will be provided for permanent relocation and shall be calculated pursuant to the URA. Replacement housing payment is equal to the difference of: the greater of: total tenant payment (tenant rent plus tenant paid utilities) at the public housing unit or 30% of monthly adjusted income; and the amount of rent plus tenant paid utilities (pursuant to the applicable voucher utility allowance schedule) at the replacement housing unit. The total rental assistance provided is for a period of 42 months.

3.1.10 Accessible Housing for Persons with Disabilities

This section is compliant with 49 CFR 24.2(a) (8) (vii) and 49 CFR 24.2(a) (8) (vii). PHA will offer residents with disabilities, who choose to be permanently relocated, with a comparable replacement unit that contains accessible features. These features will be comparable to their current unit. This is so even if the tenant has paid for the acquisition and/or installation of the accessible features in their current unit. In this instance PHA will remove and reinstall the features within the replacement unit and/or provide relocation assistance to the tenant for the cost of acquiring and/or installing comparable accessible features.

3.1.11 Security Deposits

PHA will provide the cost of a reasonable and necessary security deposit required to lease a relocation unit, which is customarily equivalent to two months' rent as part of the relocation benefits available under URA. If a resident relocates to a unit within PHA's inventory, the resident's existing security deposit will be carried over to the new unit as full payment of the deposit. If the resident relocates to housing not owned by PHA and does not have funds available to pay security deposit costs at the relocation unit, PHA will pay, directly to the landlord, a security deposit equal to two months' rent for the appropriate voucher size as determined by the HUD Housing Choice Voucher Payment Standards.[1]

[1] See, Chapter 7 of the HUD Housing Choice Voucher Program Guidebook

3.1.13 Transfers for Reasons Other than Redevelopment

Prior to relocation, residents may transfer to other PHA developments for reasons unrelated to relocation. These transfers could be by request of the resident or by PHA in accordance with the Admissions and Continuing Occupancy Policy ("ACOP"). Transfers or voluntary move-outs for reasons not related to the redevelopment of the site does not cause someone to become a "Displaced Person," and will not result in eligibility for relocation benefits. PHA will document the cause of a resident move, as required under the ACOP, when it is not subject to the URA.

An example of a transfer unrelated to relocation is one requested by a resident for a disability accommodation. A resident may ask for a unit with features unavailable in their current unit, such as a roll-in shower, that may be available in PHA's housing inventory, or an elderly resident who has been living in a one-bedroom unit may need to transfer to a two-bedroom unit in order to make room for a live-in care giver. These residents will continue to be subject to the provisions of the ACOP that define such transfers, including moving services provided by PHA.

Examples of transfers executed by PHA during the course of managing the property include transfers due to damage in the unit by fire or if the unit becomes uninhabitable for other reasons. Property managers may require a household to transfer when a family is described as "over-housed" or "under-housed." This may occur as family circumstances change over time, and residents end up living in a unit that has the wrong bedroom configuration for their household size due to the addition or subtraction of children in a household. Moving costs are not covered by the agency in this type of routine transfer. These circumstances for transfer are also governed by the provisions in the ACOP.

3.1.14 Evictions during Relocation

If a Displaced Person is evicted for just cause from Blumberg Apartments or from another PHA unit or a rental unit subsidized through a Housing Choice Voucher to which they relocated, the household will no longer be entitled to relocation assistance or the right to return to the redeveloped Blumberg Apartments. The household's eligibility for relocation assistance will not be a factor in a decision to pursue eviction proceedings. Residents shall have access to the appeals and grievance processes regarding evictions as detailed in PHA's ACOP.

3.1.15 Ineligible Residents

Residents that The tenancy of resident families that do not qualify as eligible families or mixed families must be terminated, unless the IHA decides to defer the termination

3.1.15.a Unauthorized Boarders and Lodgers

Occupants residing unlawfully in units at Blumberg Apartments are not eligible for relocation benefits and will be issued a written notice informing them of their ineligibility. Such residents will have the right to appeal this determination.

3.1.15.b. Undocumented Immigration Status

Households with members who cannot document their immigration status are not eligible to receive relocations benefits. The URA explicitly prohibits use of federal funds to provide relocation assistance to persons not lawfully present in the United States. PHA will not provide non-federal relocation assistance to assist undocumented immigrants subject to relocation.

4.0 NOTIFICATIONS

Notifications to residents regarding relocation will be posted throughout the Norman Blumberg Apartments, and hand delivered to all households in order to inform the residents of the plans to relocate residents due to the pending demolition and redevelopment of the Blumberg Apartments multifamily towers and low rises. The notifications will announce the official start of the relocation process, the plan to replace 414 multifamily public housing units at the site, and the availability of advisory social services.

4.1 General Information Notice

A General Information Notice ("GIN") and HUD brochures detailing the eligibility for relocation and relocation rights under this Plan in conformance with the URA and Section 18 are included in the August 17, 2015 Relocation Notice Packet that was hand-delivered to every resident on J. The GIN informs residents about their potential for receiving relocation assistance under the URA and Section 18. The notice cautions residents to confer with relocation staff to learn about their potential eligibility for relocation through Housing Choice Voucher Vouchers or to other PHA sites. Residents will be asked to sign an acknowledgement of their receipt of the official GIN Notice during the one-on-one meetings with the Relocation staff. The acknowledgment will be included in each households relocation file.

4.2 90-Day Relocation Notice to move

The ninety (90) day notice will be given simultaneously as the GIN to households, as permitted under Section 18 regulations. This notice informs the residents of their right to remain in the unit for a period of 90-days from the date of receipt, that they must move either temporarily or permanently in order for demolition to begin at the termination of the 90-day period, the relocation services offered for moving, reimbursement of moving expenses, (i.e. utility deposits, cable, internet and telephone service transfer), inspection of current unit, availability of family advisory supportive services, selection of a comparable unit based on the current family composition, and need to relocate at the termination of the 90 period.

4.3 30-Day Relocation Notice

The thirty (30) day relocation notice will be distributed to households that remain at the Blumberg Apartments at the termination of the 90-day period. This notice informs residents that they are required to move from their current unit within thirty (30) days from the date of the notice and provides the particulars for the move including their housing options. The Priority Policy will apply as well as the first-come-first-serve procedure.

4.4 Notice offering a Housing Choice Voucher

Each household will be informed in writing via a notice of their right to receive a Housing Choice Voucher (Housing Choice) Voucher. The notice will include information on the resident qualifications for a voucher, including criminal, credit and background checks, and the challenges of finding a suitable affordable unit in Philadelphia.

4.5 90-days Voluntary Wavier Notice and Form

Each household will be informed of their right to waive the 90 notice and offered a 90-Day Voluntary Wavier Notice form that states the resident understands that PHA will offer a comparable dwelling unit within the PHA portfolio. When the unit is ready and offered to the

resident during the 90-day period, the resident may sign a form waiving both a 90-day and 30-day notice period and expect the unit to initiate the move. The form will be added to the households relocation file.

4.6 Housing Choice Voucher Waiver Notice and Form

Each household will be informed of their right to waive the Housing Choice Voucher, if they opt to take an available alternative PHA unit. The household will sign a Housing Choice Voucher waiver form and the form will be included in the household relocation file.

5.0 RELOCATION SERVICES

Relocation services for households will be provided by PHA staff. A full-time Relocation Coordinator will be dedicated to Norman Blumberg to direct the PHA's focus on the relocation needs of these residents. The Coordinator will work closely with on-site management staff to provide notification, housing search, counseling, data tracking and other relocation services for the duration of the project. Both the Coordinator and management staff have the expertise in the intricacies of the Section 18 relocation assistance process and ensure that residents' rights are respected during relocation.

All Relocation Staff will be trained on the URA, Section 18 Relocation and the provisions of this Relocation Plan by the PHA Department of Human Resources. The training will be noted in the personnel file of each PHA staff.

The Relocation Staff will oversee relocation efforts and ensure the necessary resources for successful relocation are provided. Staff will be engaged in supporting the relocation efforts by providing needed services to the residents. Specific involvement of staff is as follows:

- The Relocation and Property Management Team will help the residents make the successful transition from their current residency to the replacement housing. The relocation process will be closely coordinated with the provision of advisory support services by YAP as described above. The Relocation staff will escort and provide transportation to proposed housing units, tour the neighborhoods and assist with inspecting potential units, providing fair housing information, and arrange for utility service as needed.
- The assigned Resident Opportunities for Self Sufficiency Coordinator will work with YAP to provide family support services to residents, obtain resources to make informed decisions about relocation challenges and opportunities and to ease their transition into the new neighborhood including but not limited to, connections to doctors, pharmacist, and places of worship.
- Housing Choice Voucher program staff, including Housing Counselors and Certification Specialists, will be responsible for the issuance of Housing Choice Voucher Vouchers and for supporting resident education about successfully leasing in the private market.

To aid relocating residents in understanding their relocation housing options, the agency has developed written materials, maps, and visuals to describe available housing options. Tours of different housing options will also be conducted. Residents will be provided with information about all available housing options.

If necessary, transportation assistance to view apartments or attend leasing appointments will be provided to residents. Staff may also assist with providing this transportation directly in company vehicles.

The relocation staff may employ the use of consultants for specific tasks, especially for advice on URA and Section 18 requirements.

Advisory support services will be provided to residents who must move due to redevelopment at Norman Blumberg. These services will be provided with interpreters and accommodations for the disabled, as needed. Specific advisory activities include but are not limited to the following:

- Identifying the needs and preferences of residents, using surveys, interviews with open-ended questioning and checklists;
- Providing additional opportunities to discuss Relocation housing options. Every resident will have at least 90 days from the initial counseling session to determine which housing option or benefit option they prefer; unless they choose to waive the 90-day period and move prior to the end of the period. Residents may change their preference after the initial selection;
- Informing residents about available relocation assistance;
- Discussing with the household how each relocation housing option might meet their stated needs;
- Explaining the meaning of the "Right to Return" to the redeveloped Blumberg apartments;
- Informing residents about the Relocation Plan's appeal process.
- Offering referrals to services or other assistance the household may need; including assistance with services such as completing an application for benefits or scheduling appointments;
- Providing current and ongoing listings of comparable units for residential relocations;
- Providing mobility counseling for relocating residents who are issued a Voucher to assure, to the extent possible, that they have full information about their relocation choices in high-opportunity areas, if they qualify for the program;
- Supplying information on other federal and state programs that offer assistance;
- Assisting relocated residents in connecting to services in their new community;
- Helping residents make a successful transition to their off-site housing and back to the redeveloped Norman Blumberg, including early identification of any issues. The Relocation Coordinator will focus on keeping open lines of communication among residents, landlords, service providers, and staff for at least three years after each household's initial move;
- Providing referrals to services for residents with lease violations and compliance issues.

6.0 RESIDENT GRIEVANCES

6.1 General

The individual tenant needs assessment that will be completed by the Relocation Team prior to commencement of relocation will guide the relocation plan for each resident. Every effort will be made to accommodate requests of residents; however, it may not be possible to facilitate all requests within the constraints of the construction needs and schedules. Recognizing that not all requests will be able to be accommodated, PHA has a grievance process to address concerns and complaints of tenants relating to the Senior Tower relocation.

The relocation Grievance Process and associated forms can found in **Appendix N** of this plan.

6.2 Return Right Appeals

A resident may be found ineligible to use their Return Right to lease a unit in the rehabbed Senior Tower based on a conviction for criminal activity (as defined in the ACOP or HCV Administrative Plan) while in relocation housing provided directly by PHA or private market housing subsidized by PHA. If such a resident is found ineligible, PHA will inform the resident in writing and state the reason(s) for their ineligibility including a description of an appeal process that is consistent with PHA's ACOP as may be amended and is consistent with 49 CFR 24.10. If a resident is found to be ineligible due to eviction with a writ of restitution from private subsidized housing, the notification will include a description of an appeal process that is consistent with PHA's Housing Choice Voucher Administrative Plan as may be amended and is consistent with 49 CFR 24.10. The HCV Administrative Plan describes a grievance hearing procedure to review ineligibility due to eviction from private housing, and this grievance hearing procedure will be used as the appeals process for Return Rights.

7.0 RIGHT TO RETURN

7.1. General

Residents that are relocated have a right to return to the project once construction/rehabilitation has been completed and the units are in decent, safe and sanitary conditions.

7.2. Pre-Occupancy Inspections

Prior to returning to the renovated Senior Tower, PHA's Relocation Team must coordinate pre-occupancy inspections with PHA's Leased Housing Department consistent with federal Housing Quality Standards (HQS) inspections. All units must pass HQS prior to move-in.

7.3. Return to Project

Residents will be provided with at least seven (7) days' notice of date and time to return to the rehabilitated unit. Consideration will be provided for circumstances beyond the control of the resident such as medical emergencies and/or other reasonable accommodations. Failure to complete the move when advised to do so shall result in termination of the right to return and termination of any further relocation assistance. PHA may take all legal action necessary including eviction action, if resident fails to vacate the temporary housing unit as directed.

7.4. Costs of Return Move

All costs and financial assistance will be provided to return residents to the newly rehabilitated unit as detailed in Appendix C.

7.5. No Re-screening of Tenants upon Return

Households are not subject to rescreening, income eligibility, and income targeting provisions, criminal background, or credit checks.

7.6. Renewal of Lease

The PHA will renew all leases upon lease expiration, unless cause exists. This provision will be incorporated into the tenant lease or tenancy addendum, as appropriate.

7.7. Resident Choice Not to Return

If residents choose not to return to the rehabilitated unit upon expiration of the relocation period, the resident may choose remain permanently relocated. If the resident refuses to act on their right of return, all relocation assistance shall cease.

8.0 APPEALS PROCESS RELATED TO RELOCATION ISSUES

Residents subject to relocation may request a review of any PHA determination concerning eligibility for relocation benefits, the amount of a relocation payment, or the selection of the comparable relocation unit provided. The results of these appeals will be reported according to the requirements under law. The appeals process for issues dealing with relocation is described below.

8.1 Residential Relocation Appeals

The Relocation Packet provided to each household will contain information on the appeals process including rights and procedures. A resident will have 60-days after receipt of a written offer of relocation benefits to file an appeal. The appeal shall be in writing, delivered to the PHA Corporate Secretary at 12 S. 23rd Street within the 60-day period. PHA will consider an appeal regardless of form provided.

Upon receipt of the written appeal, the Corporate Secretary shall assign an impartial Hearing Officer for a hearing, pursuant to PHA's Admissions and Continued Occupancy Policy ("ACOP") and Grievance Procedure, who shall serve as the authorized designee of the President & CEO. The resident may attend and be represented by a person at his or her own expense and choice, and may bring witnesses. Materials presented by the resident and all other pertinent information will be considered by PHA in making the decision.

The written decision of the Hearing Officer will be the final decision of the PHA. In keeping with 49 CFR 24.10, if the resident is not satisfied with the Hearing Officer's decision, the resident will be advised that there are options for judicial or administrative review of the agency's determination.

8.2 Return Right Appeals

A resident may be found to be ineligible to claim their Right to Return to a redeveloped unit at Blumberg due to noncompliance with their lease while in relocation housing. If such a resident is found ineligible, PHA will inform the resident in writing and state the reason(s) for their ineligibility. If a resident is found to be ineligible due to eviction with a writ of restitution from private, unsubsidized housing (including housing rented through a Voucher), the notification will include a description of an appeal process that is consistent with PHA's ACOP, as may be amended. This appeal process will be used to process appeals for Return Rights allowing a relocated resident who is no longer living in public housing access to the same grievance procedures as would apply had relocation never occurred and they had remained a public housing resident.

9.0 FUNDING FOR RELOCATION

The Philadelphia Housing Authority will fund the full cost of relocation for Norman Blumberg residents. A budget has been created for the relocation, based on provisions detailed in this Relocation Plan.

9.1 Residential Relocation Expenses

The budget reflects estimated moving costs based on the current Fixed Residential Moving Cost Schedule published in the Federal Register that applies during the period of relocation. The moving company rates available to PHA are generally lower than the schedule. Specific costs in the residential relocation portion of the budget include:

1. Moving costs, including the cost of two moves for the number of families who are expected to return to Replacement Housing at Norman Blumberg Apartments.

2. Relocation Financial Assistance that includes $100 per household, the cost of reconnection of utilities, including telephone and cable and internet service.

3. Assistance with security deposits for households that qualify for Housing Choice Voucher Vouchers and successfully find a rental unit. This expense is budgeted based on two month's rent for the appropriate voucher size as determined by the HUD Housing Choice Voucher Payment Standard.

4. Costs for interim storage of household items for residents, if necessary. For example, washers and dryers owned by residents may be stored if they move off site to a unit that has no laundry hook-ups, until they can be installed in Replacement Housing.

9.2 General Administrative Expenses

Specific costs in the general administration portion of the budget include:

- Expenses for communication with residents, such as the Relocation Packet, translation, interpretation, and printing costs;
- The salary (including benefits) of the Relocation Staff;
- Advisory cost for supportive services;
- Provision of relocation counseling, mobility counseling and assistance in locating housing;
- Transportation costs to assist residents in viewing housing options;
- General office expenses;
- Costs of securing the empty buildings prior to demolition.

10.0 RECORDKEEPING AND REPORTING

The PHA will make every effort to track and stay connected with residents who were relocated from the Blumberg Apartments. This information will be useful to ensure that residents receive proper consideration for relocation benefits.

10.1 Tracking of Residents and Notices

The tracking of residents will continue for up to three years after all residents are relocated from Norman Blumberg Apartments, since these households are vested with an absolute Right to Return to Blumberg. PHA will track residents beyond the three year period, as needed, to ensure the development and re-occupancy of all replacement units.

Residents who use Housing Choice Voucher Vouchers will be tracked with the management software, Emphasys Elite, used in the Housing Choice Voucher program.

Public Housing Residents will be tracked using Customer Relationship Management System ("CRM"), which is PHA's information technology system used to manage resident records. A list of the data fields being tracked is included in Appendix E.

10.2 Notices to Update Residents As New Units Come Online

PHA will send out periodic updates to displaced households, to inform them when replacement units come online as part of the Blumberg redevelopment. This will make it possible for them to take advantage of their Right to Return well into the future.

If residents leave subsidized housing provided by PHA they will waive their Right of Return to a rental unit but, they will be provided an opportunity to purchase a homeownership unit as part of Blumberg redevelopment.

10.3 Recordkeeping and Tracking of Notices

Copies of notices as in Section 4.0 of the plan will be kept in each household's relocation files. Copies of relocation advisory notes, offers of relocation assistance, claims forms, appeals, PHA determinations, and other documents relating to the household's relocation will be kept in the tenant file as well. The relocation tracking system may allow these documents to be stored electronically and tracked over time.

10.4 Reporting

PHA will develop monthly reports on the status of implementation of the Relocation Plan to ensure compliance. After relocation from Blumberg is complete, quarterly reports will be developed during each fiscal year until the completion and re-occupancy of all replacement units at the redevelopment Blumberg site.

The reports will provide but not be limited to the following information:

- The status of notifications about relocation provided to residents and the status of relocation counseling of residents;
- Details about the number of residents being relocated;
- The housing relocation options selected;
- The financial assistance and other relocation assistance provided by PHA;

- The number and outcome of resident appeals; and
- Other information detailed in this Relocation Plan.

In addition, the reports will include information on any evictions during the relocation period that would terminate a residents Right to Return.

11.0 CONCLUSION

This plan is intended to guide the Philadelphia Housing Authority Relocation Staff through the challenging process of relocating residents. The detailed nature of the plan is intended to take into account the difficult and complex process of relocation and return to the redeveloped site for the highly diverse resident's relocation impacts.

For assistance in understanding the plan, the following PHA staff members are available to answer questions and provide further assistance:

Staff Member	Position	Phone	Email
Erik L. Soliván	Senior Vice President	215-684-4327	erik.solivan@pha.phila.gov
Irene Brown-Williams	Senior Project Manager	215-684-2933	Irene.brown@pha.phila.gov
Vannie Miller	Relocation Coordinator	215-684-8024 215-684-4763 215-684-3584	vannie.miller@pha.phila.gov

APPENDIX A: RELOCATION PLAN ASSURANCE LETTER

PHILADELPHIA HOUSING AUTHORITY

OPENING DOORS TO OPPORTUNITIES

RELOCATION PLAN ASSURANCES

This Relocation Plan contains accurate information and has been prepared in accordance with 49 CFR Part 24, Uniform Relocation Assistance ("URA"), Real Property Acquisition Final Rule and Notice and Section 18 of the of the United States Housing Act of 1937 as amended by the Quality Housing Work Responsibility Act of 1998 . This Plan provides the following assurances to residents:

1. Relocation staff have been trained on this Relocation Plan, the URA and Section 18 requirements and will follow the provisions accordingly;

2. PHA has appropriated, reserved, set aside or otherwise committed to cover the anticipated relocation cost ,;

3. Families and individuals will have full opportunity to occupy comparable, decent, safe, and sanitary housing;

4. Relocation payments will be made promptly by PHA and to the full extent for which residents are eligible;

5. The project activities have been planned in a manner that will minimize hardships to tenants;

6. All tenants have been offered a Housing Choice Voucher, been provided the allotted time under law to relocate and any waiver of rights and privileges were done freely and free of coercion;

7. Relocation assistance and advisory support services will be provided in accordance with the needs of the resident.

APPENDIX B: GENERAL DEMOGRAPHIC AND HOUSING CHARACTERISTICS

Currently there are (89) senior families requiring a 1 bed room unit occupying the Blumberg Senior Tower located at 2340 Bolton Way, Philadelphia PA 19121.

Blumberg Senior Tower Current Occupancy Mix	
Bedroom Size	Residents
1	89

Blumberg Senior Tower - Total Unit Mix			
Unit Mix	Standard	504 Unit Designation (MM)	Total
1 Bedroom	71	19	90
0 Bedroom	4	0	4
Administrative Units (Resident Council Office)	2	0	2
Total	77	19	96

As noted, residents will be provided with a choice of an HCV voucher or an available unit within PHA's inventory. The HCV voucher option may include units in existing Unit Based Voucher buildings subsidized by PHA. A listing of available comparable PHA units is in **Appendix L**.

APPENDIX C: PROJECTED RELOCATION BUDGET

The projected costs associated with moving all (89) senior families into other locations is detailed below as prescribed by 49 CFR 24.302. PHA projects that approximately 40% of the residents in the Senior Tower will choose to relocate with a Housing Choice Voucher.

Move Out - Assisted by PHA			
Bed Room Size	***Avg. Cost of Physical Move, Packing and 30 Day Storage***	***Total Project Participants Units As of February '15***	***Total - As of August '15***
1	$912	89	$81,168
	Totals	**89**	**$81,168**

Total projected cost of financial assistance provided to approximately 65 Senior Families into comparable PHA status is detailed below.

Relocation Financial Assistance - PHA Development or other units supported by PBV						
Bed Room Size	***Total Projected Participants***	***Total Assistance Per Unit***	***Telephone Reconnection***	***Satellite/Cable Reconnection***	***Dislocation Payment***	***Total Assistance - Per Unit Size***
1	65	$150	$30	$20	$100	$9,750
Totals	**65**					**$9,750**

Total projected cost to relocate approximately 34 senior families into the Housing Choice Voucher Program is detailed below.

Relocation Financial Assistance - Housing Choice Voucher							
Bed Room Size	***Total Projected Participants -***	***Total Assistance Per Unit***	***Telephone Reconnection***	***Satellite/Cable Reconnection***	***Dislocation Payment***	***Security Deposits Assistance - Range***	***Projected Total Range***
1	10	$2,000	$30	$20	$100	$1,918 – 2,312	$ – 65,212 – 78,608
Totals	**10**						**$19,180 - $23,120**

The total projected cost for moving residents from the Senior Tower is $158,918.[2]

The projected costs associated with moving all (89) senior families back into the rehabilitated Senior Tower from other locations is detailed below as prescribed by 49 CFR 24.302.

Projected Return Move - Assisted by PHA			
Bed Room Size	***Avg. Cost of Physical Move, Packing and 30 Day Storage***	***Total Project Participants Units As of February '15***	***Total - As of August '15***
1	$912	89	$81,168

[2] As adjusted per the amendments to the total security deposit assistance provided to residents

	Totals	**89**	**$81,168**

APPENDIX D: SUMMARY OF OTHER PUBLIC HOUSING RELOCATION

Summary of other Public Housing Relocation Activities Proposed or On-going in the Jurisdiction according to PHA's one year Public Housing Plan

Development Name	Project Number	Site Number	Number of Families to be relocated
Norris Apartments –Phase II CNI and RAD	PA002	175	147
Norman Blumberg Apartments (Multifamily)	PA002	050	363
Total families to be relocated			**510**

APPENDIX E: RELOCATION NOTICES

Appendix E-1: General Information Notice Residential Tenant to Be Displaced
Appendix E-2: Relocation assistance to tenants displaced from their homes
Appendix E-3: Notice of Eligibility for Relocation Assistance
Appendix E-4: 90-day Day Notice of Permanent Relocation
Appendix E-5: 90-Day Voluntary Wavier Notice
Appendix E-6: Eligibility Assistance Acknowledgement Form
Appendix E-7: Transfer Notice 30 Day Notice
Appendix E-8: Offer of Housing Choice Voucher
Appendix E-9: Wavier of Housing Choice Voucher
Appendix E-10: Notice of Right to Return

APPENDIX E-1: GENERAL INFORMATION NOTICE RESIDENTIAL TENANT TO BE DISPLACED

PHILADELPHIA HOUSING AUTHORITY
OPENING DOORS TO OPPORTUNITIES

(date)

Dear _____:

The Philadelphia Housing Authority is interested in rehabilitating the property you currently occupy at Norman Blumberg Senior Apartments for a proposed project which may receive funding assistance from the U.S. Department of Housing and Urban Development (HUD) under the URA and Section 18 programs.

The purpose of this notice is to inform you that you may be displaced as a result of the proposed project. This notice also serves to inform you of your potential rights as a displaced person under a federal law known as the Uniform Relocation Assistance and Real Property Acquisition Policies Act (URA). You may be eligible for relocation assistance and payments under URA if the proposed project receives HUD funding and if you are displaced as a result of acquisition, rehabilitation or demolition for the project.

- This is not a notice to vacate the premises.
- This is not a notice of relocation eligibility.

If you are determined to be eligible for relocation assistance in the future, you may be eligible for:

1) Relocation advisory services including help to you find another place to live;
2) At least 90 days advance written notice of the date you will be required to move;
3) Payment for your moving expenses; and
4) Replacement housing payments to enable you to rent a comparable replacement home.

You will also have the right to appeal the agency's determination, if you feel that your application for assistance was not properly considered.

(NOTE: Pursuant to Public Law 105-117, aliens not lawfully present in the United States are not eligible for relocation assistance, unless such ineligibility would result in exceptional hardship to a qualifying spouse, parent, or child. All persons seeking relocation assistance will be required to certify that they are a United States citizen or national, or an alien lawfully present in the United States.)

Please be advised that you should continue to pay your rent and meet any other obligations as specified in your lease agreement. Failure to do so may be cause for eviction. If you choose to move or if you are evicted prior to receiving formal notice of relocation eligibility you will not be eligible to receive relocation assistance. It is important for you to contact us before making any moving plans. Again, this is not a notice to vacate the premises and does not establish your eligibility for relocation payments or assistance at this time. If you are determined to be displaced

and are required to vacate the premises in the future, you will be informed in writing. In the event the proposed project does not proceed or if you are determined not to be displaced, you will also be notified in writing.

If you have any questions about this notice or the proposed project, please contact

(name)_____, (title) _____,

(address)_____, (phone)_____.

Sincerely,

(Name and title)_____

Enclosure

APPENDIX E-2: THE HUD RESOURCE GUIDE FOR RELOCATIONS ASSISTANCE

U.S. Department of Housing and Urban Development
Office of Community Planning and Development

(*To be Distributed with Appendix 1)*

RELOCATION ASSISTANCE TO TENANTS DISPLACED FROM THEIR HOMES

Introduction

This booklet describes the relocation payments and other relocation assistance provided under the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, as amended (URA) to tenants displaced from their homes. This includes any family or individual that must move as a direct result of rehabilitation, demolition or acquisition for a project in which Federal funds are used.

If you are notified that you will be displaced, it is important that you do not move before you learn what you must do to receive the relocation payments and other assistance to which you are entitled.

This booklet may not answer all of your questions. If you have more questions about your relocation, contact the Agency responsible for the project. Ask your questions before you move. Afterwards, it may be too late.

Summary of Relocation Assistance

As an eligible tenant displaced from your home, you will be offered the following advisory and financial assistance:

Advisory Services. This includes referrals to comparable and suitable replacement homes, the inspection of replacement housing to ensure that it meets established standards, help in preparing claim forms for relocation payments and other assistance to minimize the impact of the move.

Payment for Moving Expenses. You may choose either a:

-- Payment for Your Actual Reasonable Moving and Related Expenses, or
-- Fixed Moving Expense and Dislocation Allowance.

Replacement Housing Assistance. To enable you to rent, or if you prefer, buy a comparable or suitable replacement home, you may choose either:

-- Rental Assistance, or
-- Purchase Assistance.

If you disagree with the Agency's decision as to the relocation assistance for which you are eligible, you may appeal that decision.

General Questions

How Will I Know I Am Eligible For Relocation Assistance?

You should receive a written notice explaining your eligibility for relocation assistance. You should not move before receiving that notice. If you do, you may not receive relocation assistance.

How Will The Agency Know How Much Help I Need?

You will be contacted at an early date and personally interviewed by a representative of the Agency to determine your relocation needs and preferences for replacement housing and advisory services. The interviewer will ask certain questions about you and other members of your household, including questions about your income. It is to your advantage to provide the information so that the Agency can assist you in moving with a minimum of hardship. The information you give will be kept in confidence.

How Soon Will I Have To Move?

If possible, a mutually agreeable date for the move will be worked out. You will be given enough time to make plans for moving. Unless there is a health or safety emergency, you will not be required to move without at least 90 days advance written notice of (1) at least one "comparable replacement home" that is available to you and (2) the earliest date by which you must move.

What Is A Comparable Replacement Home?

A comparable replacement home is:

- Decent, safe, and sanitary.
- Functionally equivalent to (and equal or better than) your present home.
- Actually available for you to rent.
- Affordable.
- Reasonably accessible to your place of employment.
- Generally as well located with respect to public and commercial facilities, such as schools and shopping, as your present home.
- Not subject to unreasonable adverse environmental conditions.
- Available to all persons regardless of race, color, religion, sex, or national origin.

What is Decent, Safe, and Sanitary Housing?

Decent, safe, and sanitary housing is housing that:

- Meets applicable housing and occupancy requirements.
- Is structurally sound, weather tight, and in good repair.
- Contains a safe, adequate electrical wiring system.
- Has adequate living space for the occupants.
- Has a kitchen with a sink, hot and cold running water, and connections for a stove and refrigerator (if you were displaced from a housekeeping unit).
- Has a separate, complete bathroom with hot and cold running water.
- Has heating as required by climatic conditions.
- Has an unobstructed exit to safe, open space at ground level.
- Meets standards protecting occupants from lead-based paint hazards.
- If you are physically handicapped, is free of any barriers which would preclude your reasonable use of the unit.

Will The Agency Help Me Find A Replacement Home?

Yes. You will be provided with referrals to housing that has been inspected to ensure that it meets established standards. If possible, you will be referred to at least three comparable replacement homes.

The maximum financial assistance for which you may qualify will be based on the cost of the most representative comparable replacement home that is available to you. Promptly after you become eligible for relocation assistance, the Agency will inform you of such unit and the maximum payment available.

Once the Agency representative has a clear understanding of your needs and preferences, he or she will work with you to assure that you are given the best possible choice of housing. The Agency will offer you appropriate transportation to inspect these units.

If you would like to move to government-owned housing or obtain a Section 8 "housing voucher" or "certificate," let the Agency representative know of your interest. Generally, an eligible displaced person receives preference for such long term housing assistance. You will be given assistance in completing any required application forms.

What If I Find My Own Replacement Housing?

You have every right to find your own replacement housing. However, before you rent or buy, ask the Agency to inspect the unit to make sure that it is decent, safe, and sanitary. If the housing unit is not decent, safe, and sanitary, you will not receive a replacement housing payment.

What If I Encounter A Problem In Obtaining Housing Of My Choice?

If you encounter a problem in buying or renting housing of your choice, notify the Agency immediately. The Agency will look into the matter and try to resolve it. You will receive this help whether you were referred to the housing unit or found it yourself.

If you are unable to buy or rent a housing unit because of discriminatory practices on the part of a real estate broker, rental agent, lender, or a property owner, the Agency will help you file a formal housing discrimination complaint with the U.S. Department of Housing and Urban Development or the appropriate State or local fair housing agency.

What Other Services Will I Receive?

In addition to help in obtaining a comparable replacement home, other assistance, as necessary, will be provided in order to minimize the impact of your move. This assistance may include referral to appropriate public and private agencies that provide services concerning housing financing, employment, health, welfare, or legal assistance. The range of services depends on the needs of the person being displaced. You should ask the Agency representative to tell you about the specific services that will be available to help you and your family.

What Is a Payment For Actual Reasonable Moving and Related Expenses?

You may choose to receive a relocation payment to cover the reasonable cost of your move. If you choose a Payment For Actual Reasonable Moving And Related Expenses, you may include in your claim the reasonable and necessary costs for:

- Transportation for you and your family.
- Packing, moving and unpacking your household goods.
- Disconnecting and reconnecting household appliances and other personal property (e.g., telephone and cable TV).

·Storage of household goods, as may be necessary.
-Insuranceforthereplacementvalueofyourpropertyduringthemoveandnecessarystorage.
·The replacement value of property lost, stolen or damaged in the move (but not through your neglect) if insurance is not reasonably available.

The Agency will explain all eligible moving costs, as well as those which are not eligible. You must be able to account for any costs that you incur, so keep all your receipts. Select your mover with care. The Agency can help you select a reliable and reputable mover.

You may elect to pay your moving costs yourself and be repaid by the Agency or, if you prefer, you may have the Agency pay the mover. In either case, let the Agency know before you move.

What Is A Fixed Moving Expense And Dislocation Allowance?

If you choose a Fixed Moving Expense and Dislocation Allowance, you will receive an allowance which is based on the number of rooms in your home or the number of rooms of furniture you will be moving, as shown on a schedule. The Agency has a copy of the schedule and will help you decide whether choosing this allowance is in your best interest.

If you do not have a large amount of personal property to move, this payment should be more advantageous. No special documentation is required to support your claim. You need only move your personal property and complete the appropriate claim form in order to receive your payment.

How Much Rental Assistance Will I Receive?

You may be eligible to receive Rental Assistance for a 42-month period. The assistance is computed in the following manner:

The assistance needed for one month is determined by subtracting the "base monthly rent" for your present home from the cost of rent and utilities for your new home (or a comparable replacement home, if that cost is lower). That monthly need, if any, is multiplied by 42, to determine the total amount that you will receive. This amount will be paid directly to you. However, the Agency may elect to provide the assistance in monthly installments or other periodic payments. Generally, the base monthly rent for your present home is the lesser of: (1) the monthly rent and average monthly cost for utilities, or (2) thirty (30) percent of your average monthly gross household income.

Examples: Let's say that the monthly rent and average cost for utilities for your present home are $250; the monthly rent and estimated average utility costs for a comparable replacement home are $350; and your monthly gross income is $700. In this case your "base monthly rent" would be $210 because that amount (30 percent of your income) is less than the monthly cost of rent and utilities at your present home ($250).

-- If you rent a replacement home for $360 per month, including estimated average monthly utility charges, you will receive $5,880. That amount is 42 times $140 (the difference between the "base monthly rent" for your present home ($210) and the cost for a comparable replacement home ($350)).

-- If you rent a replacement home for $310, including estimated average monthly utility charges, you will receive $4,200. That amount is 42 times $100 (the difference between the "base monthly rent" for your present home ($210) and the actual cost of your new home ($310)).

To qualify for rental assistance, you must rent and occupy a decent, safe, and sanitary home within one year after the date you move. However, the Agency will extend this period for good cause.

If I Decide to Buy, Rather Than Rent, How Much Assistance Will I Receive?

If you buy a replacement home, you may be eligible for assistance to make a down payment equal to the amount you would receive if you rented a comparable replacement home (i.e., 42 times the amount obtained by subtracting the "base monthly rent" for your present home from the monthly rent and estimated average monthly utility costs for a comparable replacement home). A down payment assistance payment will be paid in a lump sum.

Example: Assuming the information in the prior examples, the down payment assistance payment would be $5,880. That amount is 42 times $140 (the difference between the "base monthly rent" for your present home ($210) and the monthly rent and estimated average monthly utilities cost for a comparable replacement home ($350). The full amount of the payment must be applied to the purchase of the replacement dwelling.

Must I File A Claim To Obtain A Relocation Payment?

Yes. You must file a claim for each relocation payment. The Agency will, however, provide you with the required claim form, help you to complete it, and explain the type of documentation, if any, that you must submit in order to receive the payment.

If you must pay any relocation expenses before you move (e.g., a security deposit when you sign a lease for your new home), discuss your financial needs with the Agency. You should be able to obtain an advance payment to meet these costs. An advance payment may be placed in "escrow" or paid directly to a contractor to ensure that the move will be completed on a timely basis.

You must file your claim within 18 months after the date you move. However, it is to your advantage to file as soon as possible after you move. The sooner you submit your claim, the sooner it can be processed and paid. If you are unable to file your claim within 18 months, ask the Agency to extend this period.

Be careful not to confuse this 18-month period with the 12-month period within which you must rent (or buy) and occupy a replacement dwelling in order to be eligible for a replacement housing payment.

You will be paid promptly after you file an acceptable claim. If there is any question regarding your right to a relocation payment or the amount of the payment, you will be notified, in writing, of the problem and the action you may take to resolve the matter.

Will I Have To Pay Rent To The Agency Before I Move?

If the Agency acquires the property in which you live, you may be required to pay a fair rent to the Agency for the period between the acquisition of the property and the date that you move. Such rent will not exceed the market rent for comparable properties in the area.

Do I Have To Pay Federal Income Taxes On My Relocation Payments?

No. Section 216 of the URA states that you need not report relocation payments as part of your gross income for Federal tax purposes. For information on State or local income taxes, you should

check with the State or local income tax office in your area or with your personal tax advisor.

What If I Don't Receive The Required Assistance. Can I Appeal?

If you disagree with the Agency's decision as to your right to relocation assistance or the amount of a payment, or the adequacy of the housing to which you have been referred, you may appeal the decision to the Agency.

The Agency will inform you of its appeal procedures. At a minimum, you will have 60 days to file your appeal with the Agency after you receive written notification of the Agency's determination on your claim. Your appeal must be in writing. However, if you need help, the Agency will assist you in preparing your appeal.

If you are a low- or moderate-income person and are dissatisfied with the Agency's determination on your appeal, you may have an additional right to request administrative review of that decision (e.g., by HUD or the State).

You can expect a fair decision on any appeal. However, if you are not satisfied with the final administrative decision on your appeal, you may seek review of the matter by the courts.

I Have More Questions. Who Will Answer Them?

If you have further questions after reading this booklet, contact the Agency and discuss your concerns with an Agency representative. Call your local HUD office for assistance. Go to www.hud.gov to find out about your local HUD office.

HUD-1042-CPD
(Previous Edition Obsolete)

APPENDIX E-3: NOTICE OF ELIGIBILITY FOR RELOCATION ASSISTANCE

PHILADELPHIA HOUSING AUTHORITY
OPENING DOORS TO OPPORTUNITIES

NOTICE OF ELIGIBILITY FOR RELOCATION ASSISTANCE

Date:

Client # «Client_Number_»
«First_Name» «Last_Name»
«Address_Relocating_From», «Apartment_»
«City_State_Zipcode»

Dear «First_Name» «Last_Name»:

The Philadelphia Housing Authority is currently renovating units in your unit.

This is a Notice of Eligibility for Relocation Assistance. To carry out the rehabilitation activities, it will be necessary for you to relocate. You will not be required to move without a 90-day advance written notice of the date by which you must vacate. When you do move, you will be entitled to relocation assistance in accordance with Federal regulations.

You are eligible for relocation assistance, including:

Counseling and Other Advisory Service: Referral to a PHA Representative for Supportive Services (such as childcare, health care, employment and educational assistance).

Provisions for Moving: The Philadelphia Housing Authority will provide moving services for all residents affected by relocation.

- Transportation to Housing Sites;
- Payment of reasonable moving expenses
- Dislocation Allowance of $100.00 (for all permanent moves only);

Comparable Replacement Housing. The Philadelphia Housing Authority will provide suitable replacement housing for all residents affected by relocation. Additionally, PHA will cover the transfer cost including telephone, cable services and utility.

If you have not already been contacted, a representative of this office will soon contact you to determine your needs and preferences. If you have any questions, please contact Mr. Vannie Miller, Relocation Specialist at (215) 684-8024. Mr. Miller will also be available on site at the Norman Blumberg's Relocation Office, located at 2311 Jefferson Street, Philadelphia PA 19121.

Sincerely,

Vannie Miller
Relocation Specialist

APPENDIX E-4: 90-DAY DAY NOTICE OF PERMANENT RELOCATION

PHILADELPHIA HOUSING AUTHORITY
OPENING DOORS TO OPPORTUNITIES

90 – DAY NOTICE OF PERMANENT RELOCATION

DATE OF NOTICE: **DATE NOTICE PERIOD ENDS:**

«First_Name» «Last_Name»
«Address_Relocating_From», «Apartment_»
«City_State_Zipcode»

DEAR RESIDENT:

The Philadelphia Housing Authority has determined that it is necessary to relocate you from your present housing unit to another unit. The reason for the relocation is the rehabilitation of the senior towers.

This notice is to inform you that you will be required to move, but not sooner than ninety (90) calendar days from the date, (enter date), of this notice, shown above.

THIS IS NOT A NOTICE TO MOVE NOW!

Please plan to remain in you unit under the terms and conditions of your existing lease.

You will be offered a replacement dwelling unit which is comparable to your existing unit. It will be the correct size to accommodate all family members in accordance with PHA and HUD Policy. PHA will assume the responsibility for moving your furnishings and personal affects to the replacement unit.

Before you move from your current unit to another location, you are entitled to receive counseling from a relocation specialist on staff at the PHA. The Relocation Specialist will provide all necessary information about your new neighborhood – transportation, government offices, etc.—to help you feel more comfortable.

When the actual moving date has been determined by PHA, you will receive another notice thirty (30) days before you will have to move. If a suitable replacement unit is ready and offered to you before the end of the notice period shown above (90 days), you may move as soon as possible if you choose.

(***Note: If you move before the end of the 90-day waiting period shown above, PHA will request that you sign a form which will confirm that the choice to move sooner than required was authorized by you.)***

In addition, please be advised that this notice does not apply to tenants involved in eviction proceedings.

PHA will make every effort to accommodate your needs. In the meantime, if you have any questions about our plans, please contact: Vannie Miller @ 215-684-8024. This letter is important to you and should be retained.

PHA Staff Member
(Enter Number)

"I certify that I have received a copy of this 90-day Notice of Permanent Relocation and that I have had the contents of it explained to me."

_____	_____
Witness	Tenant
Date: _____	Date: _____

APPENDIX E-5: 90- DAY VOLUNTARY WAIVER NOTICE

PHILADELPHIA HOUSING AUTHORITY

OPENING DOORS TO OPPORTUNITIES

90 - Day Voluntary Waiver Notice

To Whom It May Concern:

☐ I have been notified of the pending demolition plan for my development, which necessitates a move from my existing unit.

☐ The Philadelphia Housing Authority has given me a 90-day Relocation Notice. I have read the contents of the 90- Day notices and its contents have been explained to me.

☐ I understand that residents who are required to relocate by PHA will be offered a comparable dwelling unit when it becomes available. If a unit is ready and offered BEFORE the end of the 90-day waiting period, however, I can choose to waive both a 90-day and 30-day Notice Period and move.

I hereby waive the 30-day and 90-day Waiting Periods prior to my relocation so that I may accept the following housing unit:

Address of replacement unit: Unit Number: Development

City: State: Zip Code:

_____ _____

(Signature of Head of Household) (PHA Representative)

Date: _____ Date:_____

APPENDIX E-6: ELIGIBILITY ASSISTANCE ACKNOWLEDGEMENT FORM

ELIGIBILITY ASSISTANCE ACKNOWLEDGEMENT FORM

I, Client «First_Name» «Last_Name» acknowledge that the Philadelphia Housing Authority has provided and/or delivered to me a copy of the Relocation General Information Notice and the Notice of Eligibility.

Assistance on _____.
(Date)

_____.
Resident name (Please Print)

Unit # «Unit_Relocating_From_» Address: «Address_Relocating_From», «Apartment_»

_____.
Resident Signature

_____.
PHA Representative Signature

APPENDIX E-7: 30 DAY NOTICE TO TRANFER

PHILADELPHIA HOUSING AUTHORITY
OPENING DOORS TO OPPORTUNITIES

30-DAY RELOCATION NOTICE

Date of Notice:	**Date Notice Period Ends:**
Client #	Unit #
Relocation Site:	Client Name:
Required Bedroom Size:	Current Address:
504 Reasonable Accommodations:	Nature of Relocation:

This notice is to inform you that you are required to move from your present housing unit within Thirty (30) Days from the date of this Notice, shown above. This relocation is necessary to accommodate the Revitalization Program at your site. If a suitable is found prior to the end of the notice period shown above, you may, at your option, waive the 30-day Waiting period and move as soon as possible.

Arrangements have been or are being made to move your furnishings and personal goods to the Replacement unit listed below:

Bedroom Type :	**Unit#**
Location :	**Area of the City:**

The unit selected has been inspected and complies with HUD regulations governing the relocation of residents by a federal or federally assisted agency. PHA staff will provide services, referrals, and assistance for your scheduled move (including telephone and cable, etc.)

Every effort has been made to assure that the needs of you and your family can be met. The PHA is obligated to offer you a maximum of two units for relocation purposes. If you have already been offered a unit and have refused it, the above relocation represents your final assignment.

You must remain in compliance with the terms and provisions of your dwelling lease to remain a tenant in good standing.

You will be notified by your manager as to the specific time when your move has been scheduled. Please call your manager if you have questions or need any assistance in preparing to move at 215-684-4600

I certify that I have received a copy of this 30-Day Notice of Relocation and that I have had the contents of it explained to me.

Tenant Signature_____

PHA Representative_____

APPENDIX E-8: OFFER OF HOUSING CHOICE VOUCHER

PHILADELPHIA HOUSING AUTHORITY
OPENING DOORS TO OPPORTUNITIES

Offer of Housing Choice Voucher

I, «First_Name» «Last_Name» acknowledge that the Philadelphia Housing Authority has offered to me a Housing Choice Voucher (Housing Choice) Voucher as part of the Relocation Plan and provided information regarding the qualifications for voucher use and the process for finding a unit in the private rental market.

Voucher Offered on _____
(Date)

_____ _____
Resident Signature Client Number

_____ _____
PHA Representative Signature Unit #

_____
Date of Signature

APPENDIX E-9: WAVIER OF HOUSING CHOICE VOUCHER

PHILADELPHIA HOUSING AUTHORITY
OPENING DOORS TO OPPORTUNITIES

WAVIER OF HOUSING CHOICE VOUCHER

I/we, _____, as tenant(s) of Unit #___ of Blumberg Apartments have been offered in writing a Housing Choice Voucher (Housing Choice) Voucher to be administered by the Philadelphia Housing Authority. I/we were informed about the qualifications for a voucher, and the process of finding a unit in the private rental market in Philadelphia. All the information above was provided in writing as part of the Relocation Packet.

I/we understand:

1. My/our right as tenants to receive a Housing Choice Voucher (Housing Choice) Voucher from the Philadelphia Housing Authority.
2. The qualifications and process for receiving a Housing Choice Voucher (Housing Choice) Voucher.
3. The benefits that a Housing Choice Voucher (Housing Choice) Voucher offers to tenants, including but not limited to:
    a. The right to lease a unit in the private market in Philadelphia or anywhere in the contiguous 48 states, Puerto Rico and Hawaii, subject to qualification.
    b. The right to receive utility assistance payments while using my voucher.

I have voluntarily chosen: **(check one)**

☐ To accept a **Housing Choice Voucher (Housing Choice) Voucher**

☐ To reject a **Housing Choice Voucher (Housing Choice) Voucher**

I/we have made this decision knowingly and willingly free of coercion and I understand that my/our decision cannot be revoked once the conversion is effective.

HEAD OF HOUSEHOLD

Signature:_____ Date: _____

Name printed: _____

CO-HEAD OF HOUSEHOLD

Signature:_____ Date: _____

Name printed: _____

Relocation Staff

_____

Name

_____

Signature

_____

Date

APPENDIX E-10: NOTICE OF RIGHT TO RETURN

NOTICE OF RIGHT TO RETURN

I _____, have been informed by the Philadelphia Housing Authority that as a
(Resident Name)

Tenant of the Blumberg Apartments subject to relocation this form grants my Household a **Right to Return** to a replacement-housing unit at the redeveloped Blumberg site. I have been informed and acknowledge that eligibility for retaining this Right to Return requires that I and the members of my Household must remain compliant with the residential lease – in public housing or under a Housing Choice Voucher (Housing Choice) Voucher – during relocation. If I or a member of my household fails to comply with the requirements of the residential lease during relocation, and this failure to comply with my lease results in judgment that gives the Philadelphia Housing Authority possession of my unit, I or a member of my household shall lose the Right to return to a replacement-housing unit at the redeveloped Blumberg site.

_____ _____
Signature - Head of Household Kelvin A. Jeremiah, President and CEO

_____ _____
Print Name – Head of Household Date

_____
Date

APPENDIX F: RESIDENT NEEDS ASSESSMENT QUESTIONNAIRE

PHILADELPHIA HOUSING AUTHORITY
OPENING DOORS TO OPPORTUNITIES

NEEDS ASSESSMENT QUESTIONNAIRE FOR RELOCATION PURPOSES

DATE:	UNIT ADDRESS:	Actual Bedroom Size:	Client #:
Do you presently have Cable TV?	How many Jacks do you currently have?	Will you need help with packing?	
TELEPHONE:			
BEDROOM SIZE REQUIRED:	CIRCLE INCOME TYPE: EMPLOY. SS SSI PENS. OTHER		

TENANT NAME	RELATIONSHIP	BIRTHDATE	SEX	SCHOOL	AGE	SOC. SEC. #

Who Receives: DPA Assistance Check, Medicaid, Or Food stamps In His/hers Name?		
NAME:	CASE #:	DISTRICT:
NAME:	CASE #:	DISTRICT:
CASEWORKER NAME:	PHONE #:	ADDRESS:
WHO RECEIVES SOCIAL SECURITY and/or SSI?		
NAME:	CASE #:	

NAME:		CASE #:
COUNSELOR:	PHONE #:	ADDRESS:
WHO RECEIVES VETERAN'S ADMIN. OR OTHER PENSION?		
NAME:		CASE #:
NAME:		CASE #:
COUNSELOR:	PHONE #:	ADDRESS:
WHAT HEALTH COVERAGE DO YOU HAVE?		

Is any member of the household handicapped, disabled, or attending a clinic?
GIVE NAME. TYPE OF PROBLEM. CLINIC NAME. ADDRESS. TELEPHONE #, AND DOCTOR

Tenant Name	Problem	Clinic	Phone	Address	Doctor

DOES ANY HOUSEHOLD MEMBER ATTEND SPECIAL SCHOOL, DAYCARE, OR TRAINING FACILITY?

TENANT NAME	FACILITY	TEACHER/ PHONE #	GRANTS	TRANSPORTATION

INFORMATION TO HELP PLACE YOU IN A NEW UNIT

Preferred type of Replacement Unit: Conventional Sites Scattered Sites Section 8 Private

Preferred Area of the City: Preferred Development:

Are you interested in HOMEOWNERSHIP opportunities and mortgage counseling?

Would you like to return to your present development once construction is competed?

YES NO

IS THERE ANYTHING WE SHOULD KNOW ABOUT YOU OR YOUR FAMILY TO BETTER ASSIST YOU? (Complete below)

Signature:_____
(Head of Household)

Date: _____ Tenant Signature: _____
(Spouse or Other Signatory to Lease)

COMMENTS:

Person completing this form: _____ (Signature)

APPENDIX G: RESIDENT SUPPORTIVE SERVICES NEEDS ASSESSMENT

PHILADELPHIA HOUSING AUTHORITY
OPENING DOORS TO OPPORTUNITIES

PHA offers and refers self-sufficiency services for eligible family members. Services include education, job training, job placement, business development, homeownership counseling and social services such as child care, senior services, family counseling, etc.

Date:_____ Name:_____ Client ID#_____

Address:_____APT#_____ZipCode:_____
Phone: _____Cell Phone: _____Best Time to call_____

Email:_____

I am moving to: PHA Development: _____ HCV: _____

Are you familiar with the area you are moving to? Yes: _____ No:_____

Are you aware of any support services in the area? Yes: _____ No:_____

Please check the appropriate box

□ I am interested in receiving supportive services

□ I am receiving the service I need from another Service Provider:

Provide the name of the service provider _____

□ I do not need self-sufficiency services at this time: Signature: _____ Date: _____

Do you have case management services?	Yes: _____ No:_____
Do you have medical assistance?	Yes: _____ No:_____
Are you enrolled in PHA's Resident opportunities for self-sufficiency program (ROSS)?	Yes: _____ No:_____
I want to buy a home:	Yes: _____ No:_____
I have signed up for a financial literacy training programs	Yes: _____ No:_____

I want to sign up for one of job skills training programs	Yes: _____ No:_____
I want to sign up for senior programs and services	Yes: _____ No:_____
I want to sign up for children and youth program and services	Yes: _____ No:_____
I want to own my own business	Yes: _____ No:_____

Household

Please complete each question.

1) How many people are living in your household?
   a. #of children (age 0 to 18) _____
   b. #of Adults (age 19-54) _____
   c. # Senior (age 55+)_____
2) Are you currently employed?
   a. ____Yes. Please indicate the length of time employed _____
      ___Full Time
      ___ Part Time
   b. ____ No

3) Do you want to find another means of employment? _____Yes _____No

4) If No, provide the reason for unemployment?
   _____
   _____
   _____
   _____
   _____
   _____

5) What is your range of your total household income per year? Please check one.
   □ Less than $5,000 □10,001 -15,000 □$20,001 -25,000
   □ 5,001 -10,000 □ 15,001 -20,000 □$25,001

6) Please indicate your current level of education.
   □ Less than 8th grade □GED □ Bachelor's Degree
   □ 9th -12th grade □Some College □Master's Degree
   □ High School Graduate □Associate Degree □ Certification in _____

7) Do you have a valid driver's license? ____Yes ____No

8) Do you have a valid commercial driver's license? ____Yes ___ No

9) What is important to you in your community?

_____
_____
_____
_____
_____
_____
_____
_____
_____

10) Are you experiencing any hardships? ____Yes _____No
If so, please explain

_____
_____
_____
_____
_____
_____

Career Planning

1. Are you interested in some type of training / education __ Yes __ No

2. What type of education and training would you like?

□ Construction □ Health □ Computer □ Business □ Childcare

□Law □ GED □ Cooking □ Secretarial □ Electrical

□ Other _____

3. Please check all of the following job skills that apply

1. Banking	2. Child Care	3. Construction	4. Computer Skills	5. Cosmetology	6. Customer Service
7. Electronic Assembly	8. Food Service	9. Health Care	10. Housekeeping	11. Mental Health Care	12. Nursing Home
13. Elderly Services	14. Laundry Work	15. Robotics	16. Sales	17. Seamstress /Tailor	18. Security Guard
Stock Clerk	Teacher's Aide	Non-Teaching Assistant	Truck/Bus/Van Driving	Transportation Related	Waitress or Waiter

Management/ Supervisor	Secretarial/Clerical/Office Work	Data Processing/Data Entry	Home Cleaning Services	Operating Machinery or Equipment	Repairing Machinery/Equipment
Other_____		I want to Own My Own Business_____			

House Hold (HH) Member	**Job Skills Family Members Possess** (Use the numbers above or write in your job skills)	**Type of Work you are Most Interested in Doing**	**Will this be a new Career for You?**	**I Need Training or Education for this Work**
HH #1				
#2				
#3				
#4				
#5				
#6				

Money Management

1. Do you have a Checking /Savings account? __Yes __ No

2. Are you interested in owning a Home? __Yes __No

3. Would you attend a Money management class? __Yes __No

Adult and Senior Service Needs

Please check all services required for your family.

Type of Service	**Adults: Ages 21-54**	**Seniors: Ages 55+**
My Own Business Development		
Employment Preparation		
Life Skills		
Literacy/Adult Basic Education		
Computer Literacy		
Job Training		
Job Placement		
Job Improvement		
Resume Preparation		
Driver's License Assistance		
Transportation Assistance		

TANF Assistance		
SSI		
Social Security Assistance		
Case Management needs for services		
Self-Empowerment/ Motivational Training		
Health Care		
Mental Health Care		
Intellectual Disability		
Chronic Health Problems		
Dental Care		
Substance Abuse Programs		
Homemaker Services/Home Health Aide		
Homeownership Counseling		
Budgeting/Money Management		
Credit Counseling		
Housing Counseling: Rental Delinquency		
Family Counseling		
Meals on Wheels		
Food Cupboard		
WIC		
Violence Prevention		
Parenting Skills		
Volunteer Opportunities		
Other:		

Youth Service information

1. How many youth are in the household? __(1) __(2) __(3) __ (4)__(5)___(6+)

2. What activities would you like to have access to?

□ Art	□PAL	□ Reading	□ Internet access	□Boy Scouts
□ Fashion	□Travel	□ Sports	□ Playground	□Girl Scouts
□ Crafts	□ Mentoring	□ Tutoring	□ Sports Programs	□Before School Care
□ Pre-Kindergarten programming	□ Sports Programs	□ Mentoring	□ Music Programs	□After School Care
□Day Care	□ Music Programs	□ Big Brothers/Big Sisters Program	□Cultural Programs	□Educational Activities
□ Day Care at Odd Hours (specify	□ Cultural Programs	□Youth Programs (16 to 21)	□Big Brothers/Big Sisters Program	□GED/ High School Diploma

hours)				
□College entry	□Library	□Technical School entry	□Computer Training	
□Other _____				

4. What challenges is your child facing?

□ Bullying	□ Gangs	□ Finding Role Model	□ Individualized Educational Programs (IEP)
□ Hunger Reading	□ No Clothes	□ Peer Pressure Math	□ Educational Developmental Delays
□ Drugs	□Home alone	□ Other _____	

Health

1. How often do you see a Doctor?

□ Once a week □ Every two weeks □ Monthly □Yearly

□ Rarely □ Almost never

2. What are some challenges to accessing your health?

□ Medical Expense □ Supplies □ No Insurance □ Equipment

□Other_____

3. What are your health concerns?

□ Smoking □ Overweight □Asthma

□ Dialysis □ High Blood Pressure □Glaucoma

□ Other_____

_____

4. Would you like more information about?

□ Exercise □Weight Training □ Healthy Eating

□ Other

Date: _____ Tenant Signature:_____
(Head of Household)

Internal Use Only

Supportive Services Team Signature: _____
Date:_____

Reviewed by PHA Staff: _____
Date:_____

APPENDIX H: RELOCATION ADVISORY SUPPORT SERVICES

To support the relocation of residents in the Senior Tower the follow advisory supportive services will be provided.

YAP Activities:

- Flyer will be disseminated by Resource Advocate s (RAs) to residents door to door to inform the resident of the office hours staff will be completing the Supportive Services Assessments.
- Supervise staff and update manual.
- Community cafes will occur once per month weather permitting.
- YAP staff will utilize "Family Vision Plans" to coordinate services and tracking purposes per family.
- A phone hot line will be established.
- YAP will coordinate and inform other provider's efforts regarding community and family needs

Clarifi Activities:

- Provide one-to-one counseling to PHA residents its developments, scattered sites and Housing Choice Voucher participants (residents). The FEC counselors will help residents analyze, understand and get control of their personal finances including, but not limited to, understanding credit scores, budgeting, saving, and decreasing debt.
- Provide residents interested in the long-term goal of homeownership, in coordination with the PHA Department of Community Operations and Resident Development (CORD), counseling on the purchase of a home including, but not limited to, saving, understanding credit scores and rating, guidance on mortgage products, property taxes and home ownership insurance. FEC counselors are not HUD-approved housing counselors. Once a resident is actively looking for a home or applying for a mortgage, he/she will be referred to a HUD-approved housing counselor at Clarifi or another HUD-approved agency.

Public Health Management Corporation Activities:

PHMC is the designated provider for Health and Welfare social services to residents in the PHA's Blumberg/Sharswood Choice Neighborhood Initiative. PHA and PHMC will coordinate on the provision of health assessments for residents in the Senior Tower to identify the health needs of the residents, coordinate the move of the most frail seniors and continuous uninterrupted attachment to necessary health services.

APPENDIX I: PHA AVERAGE RELOCATION ASSISTANCE COST

Total cost to relocate (363) Families into PHA owned properties in (V) and (V7) status units is detailed below.

Relocation Financial Assistance - PHA Development or Scattered Site

Bed Room Size	*Total Projected Participants*	*Total Assistance Per Unit*	*Telephone Reconnection*	*Satellite/Cable Reconnection*	*Dislocation Payment*	*Total Assistance - Per Unit Size*
1	33	$150	$30	$20	$100	$4,950
2	133	$170	$40	$30	$100	$22,610
3	122	$245	$50	$95	$100	$29,890
4	75	$313	$65	$148	$100	$23,475

The cost to relocate the remaining families into the Housing Choice Voucher Program is detailed below.

Relocation Financial Assistance - Housing Choice Voucher

Bed Room Size	*Total Projected Participants -*	*Total Assistance Per Unit*	*Telephone Reconnection*	*Satellite/Cable Reconnection*	*Dislocation Payment*	*Security Deposits Assistance*	*Total Per Unit Size*
1	33	$2,000	$30	$20	$100	$1,850	$66,000
2	133	$2,020	$40	$30	$100	$1,850	$268,660
3	122	$2,095	$50	$95	$100	$1,850	$255,590
4	75	$2,163	$65	$148	$100	$1,850	$162,225

The total projected cost associated with relocating (363) Families is detailed below.

Relocation Financial Assistance Mixture	Total
90% Public Housing + 10% HCVP	$148,080.00
95% Public Housing + 5% HCVP	$114,502.50
100% Public Housing + 0% HCVP	$80,925

APPENDIX J: RELOCATION BUDGET

Budget Estimate - Line Item Roll Up - Blumberg Relocation	
Resident Move Out Assisted by PHA	$424,260
HCV Deposit Assistance	$80,000
Relocation Financial Assistance	$365,844
Relocation Staff	$279,010
(1 Supervisor, 2 Specialists, 2 Administrative Support)	
Administrative Expenses	$50,000
Social Service Support	$60,000
Total	**$1,259,114**

APPENDIX K: CONSTRUCTION SCHEDULE (PRELIMINARY)

1) Initial Site Map and Senior Tower rehabilitation

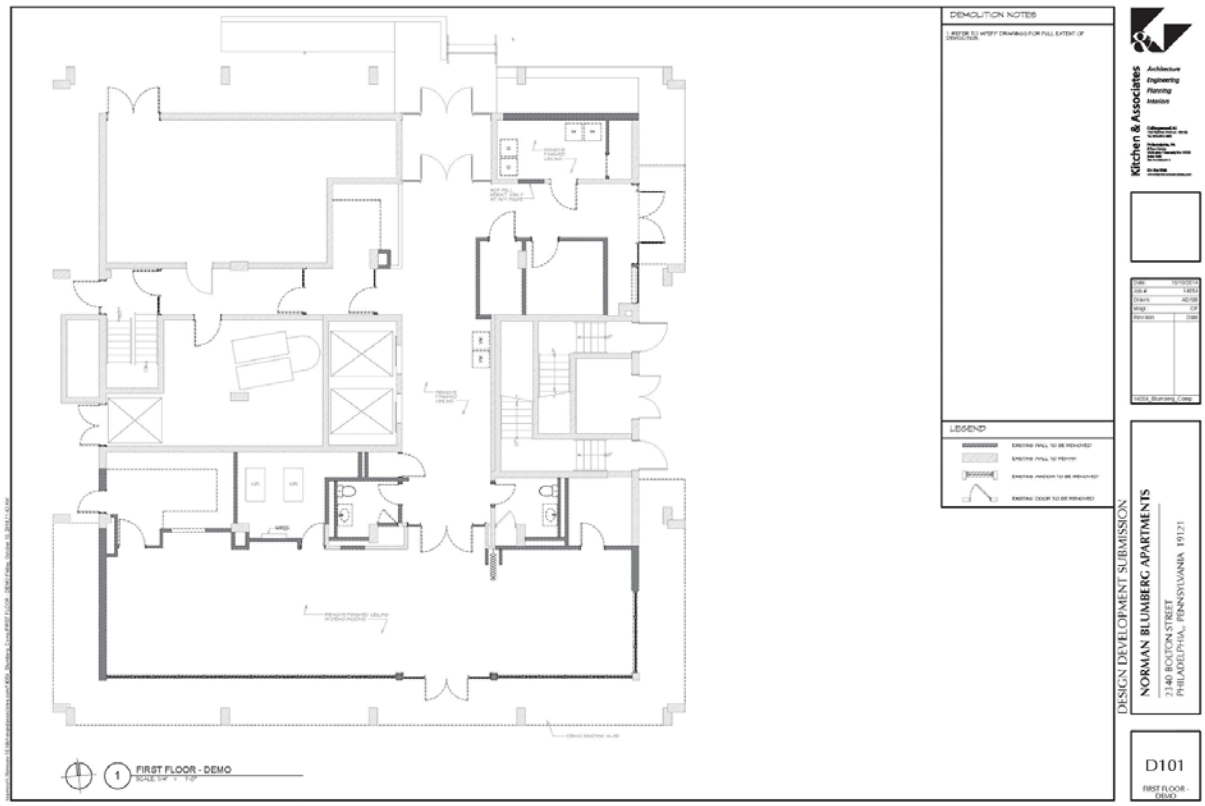


Exhibit B: Existing Blumberg Senior Tower First Floor Plan Image Source: PHA

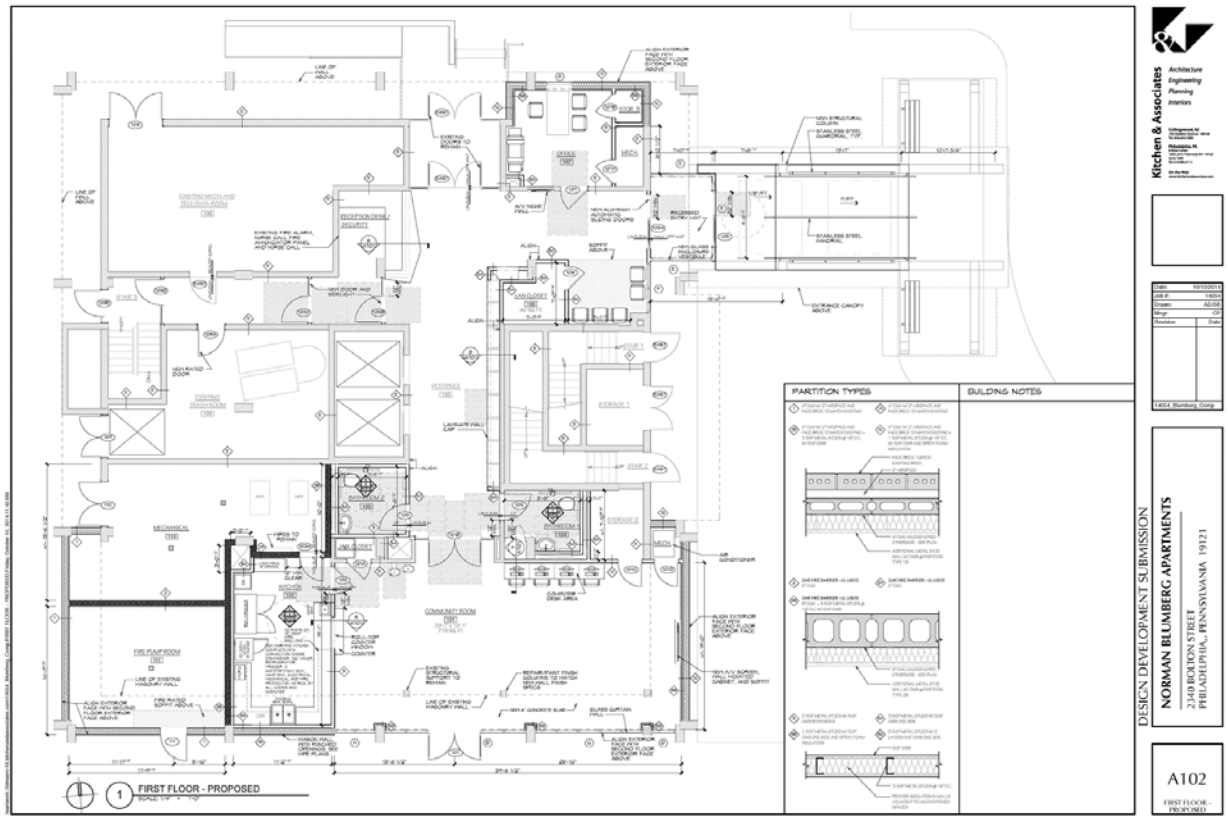


Exhibit C: Proposed Blumberg Senior Tower First Floor Plan Image Source: PHA

2) Potential Transition of Tenants/Tenant Transition

Under normal circumstances, PHA would temporarily relocate the residents of the Senior Tower during the demolition and construction activities as described above and return the residents once the development activities are completed. However, in this case, since there are three separate but interrelated construction activities planned at the Blumberg site (i.e. (i) the demolition of the multifamily towers, (ii) the construction of 57 new affordable housing units as part of Phase I, and (iii) the rehabilitation of the Senior Tower as part of RAD, which would require multiple moves of the same elderly residents. First, PHA will absolutely need to relocate the residents of the Senior Tower to accomplish the demolition activities at the multifamily towers since the project requires several months for the separation and rerouting of the currently interconnected utility lines. Second, PHA would then need to conduct a second relocation of the same seniors when the renovations at the Senior Tower (which are planned to occur late next year using RAD financing). Minimizing the number of times that the seniors will be displaced is in the best interests of the seniors.

APPENDIX L: LISTING OF UNIT AVAILABLIITY FOR RELOCATION

Site Name	Address	Street Name	Unit #	Postal	Bedroom Size	Senior Bldg Desig	504 Units Available
West Park Apartments	2502	JACKSON ST	12F	19145	1	Y	No
West Park Apartments	2502	JACKSON ST	7B	19145	1	Y	No
West Park Apartments	2508	JACKSON ST	1A	19145	2	Y	No
West Park Apartments	2508	JACKSON ST	11D	19145	1	Y	No
West Park Apartments	2504	JACKSON ST	8D	19145	1	Y	No
West Park Apartments	2508	JACKSON ST	7E	19145	1	Y	Yes
West Park Apartments	2508	JACKSON ST	11C	19145	1	Y	No
Morton Homes	5815	BAYNTON ST	A	19144	1	Y	No
Morton Homes	226	E RITTENHOUSE ST	A	19144	1	Y	No
Morton Homes	234	E RITTENHOUSE ST	A	19144	1	Y	No
Morton Homes	5813	BAYNTON ST	B	19144	1	Y	No
Parkview Apartments	2101	N 33RD STREET	D	19121	0	Y	Yes
Parkview Apartments	2103	N 33RD STREET	A	19121	1	Y	Yes
Parkview Apartments	2103	N 33RD STREET	B	19121	1	Y	No
Parkview Apartments	2105	N 33RD STREET	F	19121	0	Y	No
Cassie L Holley	2100	DICKINSON ST	219	19146	0	Y	No
Cassie L Holley	2100	DICKINSON ST	509	19146	0	Y	No
Cassie L Holley	2100	DICKINSON ST	508	19146	0	Y	No
Cassie L Holley	2100	DICKINSON ST	207	19146	0	Y	No
Cassie L Holley	2100	DICKINSON ST	307	19146	1	Y	Yes
Katie B Jackson	400	N 50TH STREET	201	19139	0	Y	No
Katie B Jackson	400	N 50TH STREET	307	19139	0	Y	No
Katie B Jackson	400	N 50TH STREET	209	19139	0	Y	No
Katie B Jackson	400	N 50TH STREET	108	19139	0	Y	No
Katie B Jackson	400	N 50TH STREET	103	19139	0	Y	No
College View	1255	N 27TH STREET	B	19121	1	Y	No
Holmecrest Homes	4209	STANWOOD CT	A	19136	0	Y	No
Holmecrest Homes	4211	STANWOOD CT	C	19136	0	Y	No
Holmecrest Homes	4204	WELSH CT	C	19136	0	Y	No
Emlen Arms	6733	EMLEN ST	504	19119	0	Y	No
Emlen Arms	6733	EMLEN ST	516	19119	1	Y	No
Emlen Arms	6733	EMLEN ST	604	19119	0	Y	No
Emlen Arms	6733	EMLEN ST	606	19119	1	Y	Yes
Emlen Arms	6733	EMLEN ST	613	19119	0	Y	No
Emlen Arms	6733	EMLEN ST	617	19119	0	Y	No
Emlen Arms	6733	EMLEN ST	805	19119	0	Y	No
Emlen Arms	6733	EMLEN ST	812	19119	1	Y	No

Emlen Arms	6733	EMLEN ST	408	19119	1	Y	No
Emlen Arms	6733	EMLEN ST	503	19119	1	Y	No
Emlen Arms	6733	EMLEN ST	510	19119	0	Y	No
Bentley Hall	1710	N CROSKEY ST	511	19121	0	Y	No
Bentley Hall	1710	N CROSKEY ST	317	19121	0	Y	No
Bentley Hall	1710	N CROSKEY ST	309	19121	1	Y	No
Bentley Hall	1710	N CROSKEY ST	210	19121	0	Y	No
Bentley Hall	1710	N CROSKEY ST	208	19121	0	Y	No
Bentley Hall	1710	N CROSKEY ST	104	19121	0	Y	No
Bentley Hall	1710	N CROSKEY ST	102	19121	1	Y	No
Bentley Hall	1710	N CROSKEY ST	111	19121	0	Y	No
Plymouth Hall	2201	W VENANGO ST	409	19140	0	Y	No
Plymouth Hall	2201	W VENANGO ST	304	19140	0	Y	No
Plymouth Hall	2201	W VENANGO ST	203	19140	0	Y	No
Plymouth Hall	2201	W VENANGO ST	202	19140	1	Y	Yes
Gladys B Jacobs	1100	FAIRMOUNT AVE	417	19123	1	Y	Yes
Gladys B Jacobs	1100	FAIRMOUNT AVE	108	19123	1	Y	Yes
Gladys B Jacobs	1100	FAIRMOUNT AVE	210	19123	1	Y	No
Gladys B Jacobs	1100	FAIRMOUNT AVE	406	19123	1	Y	No
Germantown House	5457	WAYNE AVENUE	209	19144	1	Y	Yes
Germantown House	5457	WAYNE AVENUE	401	19144	1	Y	Yes
Germantown House	5457	WAYNE AVENUE	410	19144	1	Y	Yes
Germantown House	5457	WAYNE AVENUE	602	19144	1	Y	Yes
Germantown House	5457	WAYNE AVENUE	609	19144	1	Y	Yes
Germantown House	5457	WAYNE AVENUE	715	19144	1	Y	Yes
Germantown House	5457	WAYNE AVENUE	811	19144	1	Y	Yes
Greater Grays Ferry Estates I	3001	MOORE STREET	110	19145	1	Y	Yes
Greater Grays Ferry Estates I	3001	MOORE STREET	208	19145	1	Y	Yes
Greater Grays Ferry Estates I	3001	MOORE STREET	327	19145	1	Y	Yes
Greater Grays Ferry Estates I	3001	MOORE STREET	228	19145	1	Y	Yes
Greater Grays Ferry Estates I	3001	MOORE STREET	209	19145	1	Y	Yes
Mantua I	657	N 36th St	#A	19104	1	N	N/A
Marshal Shepard	615	N 41st St	# A	19104	1	N	Yes
Marshal Shepard	621	N Budd St	# A	19104	1	N	Yes
Marshal Shepard	4065	Haverford Ave	# A	19104	1	N	Yes
Marshal Shepard	828	N Markoe St		19139	1	N	N/A

Marshal Shepard	4035	Warren St	# A	19104	1	N	Yes
Mount Olivet	671	HOLLY MALL	B	19104	1	N	No
Mount Olivet	661	42ND STREET	B	19104	1	N	No
Mount Olivet	668	HOLLY MALL	D	19104	1	N	No
Mount Olivet	663	HOLLY MALL	D	19104	1	N	No
Mount Olivet	670	N. 41ST STREET	B	19104	1	N	No
Mount Olivet	669	42ND STREET	A	19104	1	N	No
Mount Olivet	673	42ND STREET	A	19104	1	N	Yes
Mount Olivet	673	42ND STREET	B	19104	1	N	No
Mount Olivet	662	N. 41ST STREET	A	19104	1	N	Yes
Nellie Reynolds Garden	2653	GLENWOOD AVE	217	19121	1	N	Yes
Nellie Reynolds Garden	2653	GLENWOOD AVE	304	19121	1	N	Yes
Nellie Reynolds Garden	2653	GLENWOOD AVE	208	19121	1	N	Yes
Norris, LP	1023	W. NORRIS St	A	19122	1	N	No
Paschall Village I	7232	SAYBROOK AVENUE	B	19142	1	N	No
Paschall Village II	7129	GREENWAY AVE	A	19142	1	N	Yes
Richard Allen III	912	OGDEN PLACE	B	19123	1	N	No
Suffolk Manor	1424	CLEARVIEW STREET, BLGD K	101	19141	1	N	No
Suffolk Manor	1424	CLEARVIEW STREET, BLGD K	603	19141	1	N	No

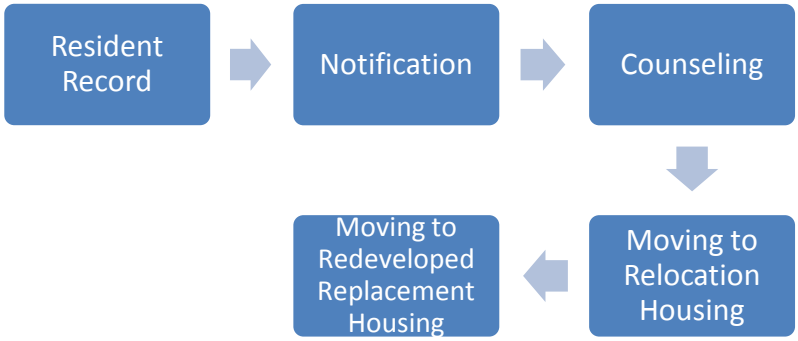
APPENDIX M: SITE OCCUPANT RECORD

Data Collection Template: List of Data Fields collected

The full redevelopment of Blumberg Apartments is expected to be complete in phases over a 6 to 7 year period. During this time, resident records about relocation notices will be kept, residents will be tracked to ensure they can get information to consider using their Return Rights to come back to the redeveloped Blumberg Apartments, and metrics about the progress towards socio-economic goals will be tracked and analyzed.

To ensure that all data can be collected and managed, all residents will be placed on the relocation waitlist and flagged as relocatees within the CRM system. Moves of all households from Blumberg apartments are tracked, as well as move from relocation housing to other housing and back to Blumberg apartments into Replacement Housing, if applicable. The database will be operational by July 2015. Reports will be issued representing whatever data is requested, gathered from the comprehensive list of fields below used to populate the database.

To organize the database, the relocation process is organized into the following logical progression:



Definition of Resident Record

For each household, the following fields will be updated in the existing CRM program:

General household data:

1. Client ID #
2. Name of Head of Household
3. Data for each household member:
4. Name
5. Social Security Number
6. Date of Birth
7. Sex
8. Ethnicity
9. Race
10. Disability Status
11. Native Language
12. Other Languages Spoken

13. Interpretation Services Used (yes/no)

Address info (pre-relocation):

14. Blumberg Unit ID #
15. # of bedrooms
16. Address
17. Phone
18. Cell Phone
19. Email

Household Income:

20. Total household Income
21. Other income
22. Income certification date

Historical lease data:

23. Original Blumberg Apartments move-in date
24. Copy of original Blumberg lease on file

Household Relocation Status:

25. Displacement status (notified, displaced, relocated, returned)
26. Qualify for relocation benefits
27. Right of return eligibility

Relocation priority list:

28. Rank
29. # of bedrooms eligibility

Relocation Preference info:

30. Relocation preference
31. Location preference
32. Disability accommodations

Relocation housing site visit info:

33. Address of offered unit
34. Date viewed
35. Travel reimbursement (payment type, tour participation)

Moving info:

36. Date of move

37. Relocation move or return move?

38. Moving option (e.g. self-move with fixed payment, self-move with reimbursement, PHA movers)

39. Self- move payment amount (e.g. reimbursement, fixed payment, etc.)

40. Lease start date

41. Lease end date

42. Rent (housing cost)

Eviction info:

43. Type of eviction

44. Date of eviction

45. Name and address of unit

46. Notes

Appeals info:

47. Date of appeal

48. Type of appeal (e.g. replacement benefits, right to return, etc.)

49. Appeals status

50. Appeals decision

51. Final outcome (e.g. dismissed, forwarded to HUD, etc.)

52. Notes

The following data fields are new data that will be entered during the relocation process to track households:

Student info:

53. Student name

54. Name and address of school

55. Type of school (e.g. elementary - public)

56. School of choice (yes/no)

Notification info:

57. Type of notification to be scanned to the resident file (e.g. GIN, 90-day notice, Move In notice, etc.)

58. Date of notification

59. Filename of document

60. Date of acknowledgement

61. Filename of scanned acknowledgment document

Counseling info:

62. Dates of counseling sessions

63. Topics discussed

64. Service provider info

<u>Move to relocation housing</u>

<u>Existing unit inspection info:</u>

65. Date of inspection

66. State of unit (e.g. normal, special)

<u>Relocation offer info:</u>

67. Date of offer

68. Address of unit

69. # of bedrooms

70. # of bathrooms

71. Accepted offer (yes/no)

72. Accepted a HCV voucher

<u>Move assistance info:</u>

73. Type (e.g. transfer of cable, electricity, internet, lease fees, etc.)

74. Verify fees in lease (security deposit, credit check, etc.)

75. Paid to

76. Reimbursement amount

<u>Claims info:</u>

77. Date of claim

78. Amount of claim

79. Notes

80. Approval

81. Filename of scanned document

<u>Post-relocation info:</u>

82. Referrals

83. Notes

84. Dates logged

Move to Replacement Housing

<u>Use Return Rights info:</u>

85. Changes in household size, etc. reported by resident

86. Notes

87. Dates logged

Replacement Housing availability offer notice:

88. Date notice sent

89. # of bedrooms match

90. Address of unit

Replacement Housing site visit info:

91. Address of offered unit

92. Date viewed

93. Accepted

94. Notes

APPENDIX N: GRIEVANCE PROCEDURE

PHILADELPHIA HOUSING AUTHORITY
GRIEVANCE PROCEDURE APPLICABLE TO
SECTION 18 RELOCATION FROM
NORMAN BLUMBERG SENIOR TOWER

Effective August __, 2015

GRIEVANCE PROCEDURE SUMMARY AND TIMELINE

1. When residential relocation assistance is offered, PHA staff will inform the resident of this relocation appeal procedure, which shall be consistent with PHA's Grievance Procedures under the Admissions and Continued Occupancy Policy.

2. Grievances filed under this Procedure, which is only applicable to grievances related to an offer of residential relocation assistance, must be made within sixty (60) calendar days of the receipt of a written offer of relocation benefits.

3. The grievance must be in writing and delivered to the PHA Management Office or the PHA Corporate Secretary within the sixty (60) calendar days. The agency will consider the grievance regardless of form.

4. A hearing will:
   a) be scheduled within ten (10) business days of the date of PHA's receipt of the grievance;
   b) take place within fifteen (15) business days of the date of PHA's receipt of the grievance; and
   c) have at least ten (10) calendar days' notice provided to the parties.

5. The Grievance Hearing Officer shall file a written decision within five (5) business days of the date of the hearing and the decision shall indicate the process for any further judicial or administrative appeals.

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I. Grievance Process Only Applicable for Relocation Assistance Matters for Residents of Norman Blumberg Senior Tower

II. Who May Present a Grievance

III. Not Included in the Grievance Process

IV. Scheduling of the Grievance Hearing

V. Grievance Hearing

VI. Selection of Hearing Officer

VII. Decision by Hearing Officer

VIII. Role of Resident Leadership in the Grievance Hearing Process

A Sample Grievance Request Form is attached at the end of this Procedure.

I. Grievance Process Only Applicable for Relocation Assistance Matters for Residents of Norman Blumberg Senior Tower

This Grievance Procedure ("Procedure") is only applicable to requests for grievance hearings related to offers of relocation assistance for residents at Norman Blumberg Senior Apartments and is consistent with the PHA Public Housing Grievance Procedure that is applicable under the Admissions and Continued Occupancy Policy ("ACOP").

However, this Procedure: 1) provides for different timelines for scheduling of hearings, 2) does not require the informal settlement conference, 3) attaches a sample grievance request applicable to this Procedure, 4) specifies that grievances may be submitted to the Property manager or to the Corporate Secretary, and 4) requires a decision by the hearing officer in a shorter timeframe.

For all other grievances, for residents of PHA public housing, the PHA Public Housing Grievance Procedure applies.[3]

Grievances filed under this Procedure, which is only applicable to grievances related to an offer of residential relocation assistance, must be made within sixty (60) calendar days after the receipt of a written offer of relocation benefits. While PHA will consider the grievance regardless of form, a sample grievance under this Procedure is attached as Appendix "A."

The grievance must be in writing and delivered to the PHA Management Office or the PHA Corporate Secretary. The address for the PHA Corporate Secretary is 12 S. 23rd St., Philadelphia, PA, 19103.

If the tenant files a grievance, the adverse action in the Notice (in this case, the portion of the offer of relocation assistance that is being grieved) will not be carried out until the grievance process has been completed. 24 CFR§ 966.4(e)(8)(B).

II. Who May Present a Grievance

A grievance may be presented by a tenant who executed the lease and resides in the unit *or* by the remaining head of household of the tenant family living in the unit.

III. Not Included in the Grievance Process

The grievance procedure is *not* available for certain disputes and they must be dealt with in the courts if the tenant contests the action. These disputes include:

1. any criminal activity that threatens the health, safety or right to peaceful enjoyment of the premises of other residents or employees of PHA;

[3] Following conversion of the units at Norman Blumberg Senior Apartments from a Public Housing subsidy to a Project Based Voucher subsidy under the Rental Assistance Demonstration Program, the informal hearing procedures applicable to the Housing Choice Voucher (HCV) appeals process (the HCV equivalent of grievances) will be applicable.

2. any violent or drug-related criminal activity on or off such premises; or
3. any criminal activity that resulted in a felony conviction of a household member.

If a grievance is requested, but it is for a dispute of one of the 3 types noted above, the complainant will receive a letter from PHA denying a grievance hearing.

IV. Scheduling of the Grievance Hearing

If the complainant is entitled to a grievance hearing, the PHA hearing coordinator will contact the complainant, PHA, the hearing officer and an Assistant Hearing Officer, if designated and agreed to by the complainant, for scheduling purposes, then:

1. **schedule** a grievance hearing at a reasonably convenient time that is not more than fifteen (15) business days from the date that PHA receives the request for a grievance hearing, unless the parties and the hearing officer agree in writing to an extension;

2. **send written notification of the hearing** to the complainant, with a copy to PHA– with at least ten(10) calendar days' notice to the parties of the hearing date;

3. **provide the opportunity for an exchange of documents**, if requested, for both sides to see any documents that will be presented to the hearing officer, at least three (3) business days before the hearing, and send all identified documents for use at the hearing to the hearing officer; and

4. **obtain the names of any witnesses** at least three (3) business days in advance of the hearing. Failure to provide the name of a prospective witness will result in the person *not* being able to testify, unless the hearing officer, in the interests of fairness, allows for the presentation of testimony.

V. Grievance Hearing

The hearing will be held before an impartial hearing officer and Assistant Hearing Officer, if designated and agreed to by the complainant. A hearing officer may make a decision without a hearing, if it is determined that the same issue was previously decided in another proceeding. 24 CFR § 966.56(c).

Neither party may engage in any "side conversations" with the hearing officer about the case, either from the complainant, PHA or any representative of those parties. *To avoid even the appearance of such communications before, during or after the hearing, the parties should communicate with the hearing coordinator for scheduling matters and not e-mail or call the hearing officer,* unless the other party is simultaneously included in the e-mail or the call.

The rules set forth in the PHA Grievance Procedure in effect as of the effective date of this Procedure shall apply to the conduct of the hearing, which include the following:

1. Both PHA and the complainant shall have the opportunity, upon request, to look at any records that are directly relevant to the hearing and/or that will be presented at the

hearing, *which opportunity shall be made at least three (3) business days in advance of the scheduled hearing*, either at PHA offices or at the office of the property manager, unless the hearing officer allows a shorter time for meaningful review by both parties.

2. PHA and the complainant shall have the opportunity to copy relevant records at their own expense.

3. Any records for which a party made a written request for inspection, but which was not provided to the other party, may not be used at the hearing, unless the hearing officer decides to allow the evidence as a matter of fairness in exceptional circumstances and may also allow for a continuance.

4. The complainant, at the complainant's expense, has the right to be represented by counsel or by any other representative selected by the complainant, including a representative from the tenant council who is acting as an advocate for the complainant – however, the complainant must also be present at the hearing.

5. PHA or the complainant may make arrangements in advance and at their own expense, to have the hearing transcribed and any interested party may purchase a copy of the transcript. Otherwise, no recordings, photographs or videotaping of the proceedings are allowed without the permission of the hearing officer.

6. The complainant shall have the right to present relevant evidence and arguments in support of the complainant's dispute/grievance, to challenge evidence relied upon by PHA or property management and to confront witnesses.

7. The rules of evidence at the hearing are not the same as those in a judicial proceeding; hearsay may be admitted but may not be the sole basis for a decision; and testimony shall be given under oath administered by the hearing officer, averring that the information shall be true and correct to the best knowledge of the person presenting the evidence, under penalty of perjury.

8. The complainant has the right to a reasonable accommodation, upon request, for persons with disabilities to participate in the hearing, which may include qualified sign language interpreters, readers, accessible locations, or attendants.

9. Interpretation for individuals identified as limited English proficient shall be provided in accordance with PHA's language access policy and procedures.

10. Any safety or security concerns regarding the hearing should be presented to the PHA hearing coordinator or property manager in advance of the scheduled hearing.

11. There may be a reasonable continuance of the scheduled hearing for good cause, which determination shall be in the discretion of the hearing officer and will include any unavoidable conflict that seriously affects the health, safety or welfare of the family, a critical witness for PHA or the complainant, or the hearing officer.

12. If either party fails to appear within fifteen (15) minutes of the scheduled time for the hearing, the hearing officer may make a determination to postpone the hearing for a period not to exceed five business days or may make a determination that the party has waived his right to a hearing and so notify both parties. Failure by a previously non-appearing party to attend the re-scheduled hearing will result in a decision that the non-appearing party has waived his right to a hearing. Written notice will be sent to both parties. A decision regarding waiver of any right to a grievance hearing due to non-appearance by the tenant does not impact the tenant's right to contest PHA's disposition of the grievance in an appropriate judicial proceeding.

13. In exceptional cases, at the discretion of the hearing officer and with the consent of both parties, a hearing may be conducted with one party appearing by telephone or other means that does not involve the individual's physical presence. A hearing officer may make a decision without a hearing, if it is determined that the same issue was previously decided in another proceeding. 24 CFR § 966.56(c).

14. The hearing shall be conducted by an impartial hearing officer and a written decision shall be based solely and exclusively on the facts presented at the hearing.

VI. Selection of Hearing Officer

Grievance hearings shall be conducted by hearing officers appointed by the PHA after consultation with tenant council, in the manner described in the PHA Public Housing Grievance Procedure in effect as of the effective date of this Procedure.

VII. Decision by the Hearing Officer

The hearing officer shall prepare and distribute a written decision, with an explanation of the reasons for the decision within five (5) business days of the hearing.

The decision shall be binding on PHA, unless:

1. the Board of Commissioners determines within a reasonable time and promptly informs complainant that: 1) the complaint was not one that was appropriate for a grievance procedure; or 2) the decision of the hearing officer is contrary to applicable law, regulations or the requirements of any annual contract between HUD and the PHA. 24 CFR § 966.57(b) or

2. there is a significant procedural or administrative error that is demonstrated to the hearing officer by written request for reconsideration from either party, within three (3) business days of the date of the decision, in which case the hearing officer has two (2) business days to re-issue the decision.

If the decision is against the complainant, the complainant still retains any rights he or she may have to judicial remedies. 24 CFR § 966.57(c).

VIII. Role of Resident Leadership in the Grievance Hearing Process

The resident leadership may have two roles in the grievance hearing process: 1) a role as educator and advocate for complainants and tenants and 2) a role as an impartial Assistant Hearing Officer. These roles are distinct and must not overlap.

1. In order to ensure that all tenants are familiar with the grievance procedures, which safeguard their due process and other rights, PHA shall work with the tenant council, upon request, to train tenant council representatives.

2. Those tenant council representatives are to be available to assist complainants with preparing grievances and going through the grievance process.

3. The tenant council shall provide the Property Manager with contact information for its designated grievance representatives and the Property Managers shall provide such information upon request from a tenant/complainant.

4. Separate and distinct from tenant council advocates for complainants, and pursuant to the PHA Public Housing Grievance Procedures, Assistant Hearing Officers who are residents and who have received training for their roles, may participate in an impartial capacity in the hearing; however, such participation is only with the consent of the grievant.

NORMAN BLUMBERG SENIOR TOWER:
PHA GRIEVANCE HEARING REQUEST FORM

This request must be submitted to the Property Manager or the Corporate Secretary (at: 12 S. 23rd St., Philadelphia, PA 19103) within sixty (60) calendar days of the receipt of a written offer of relocation benefits.

The information in this document is available in an alternative format upon request and can be translated if required. Ask your Property Manager if you need assistance.

Your tenant council may assist you in preparing this Form and you may obtain further information from your resident council representative. If you do not know who this is, your Property Manager can provide contact information. The timelines for submission of this form apply regardless of whether you seek assistance from your tenant council.

Date: _____ Name: _____

Client ID: _____ Tel Number: _____

Unit Address: _____

Site Name: _____ Unit ID: _____

⇨ Please explain the reasons for your dispute and what you want PHA to do (or not do) -- you may pick one or more, below:

_____

_____

_____

_____

_____;

_____

_____

⇨ If you plan to have an attorney, service agency, or medical provider(s) representing you at the grievance hearing, please include a mailing address and daytime telephone number for each:

_____

_____

If you have a disability that could affect your ability to participate at the grievance hearing, you have the right to request a reasonable accommodation. Please specify the type of assistance needed:

_____

_____

The hearing coordinator will notify you that: 1) the requested accommodation is granted and will be provided, 2) more information is required, or 3) the request is denied.

⇨ If you are a victim or threatened victim of domestic violence, dating violence, or stalking, you have certain protections under the VAWA, which applies to men as well as women. Please contact the Philadelphia Domestic Violence Hotline at 1-866-723-3014, if you have questions.

⇨ **Resident Signature**: _____ **Date**: _____