INLIVIAN
HOUSING REDEFINED

2027

Moving to Work
Annual Plan



INLIVIAN LEADERSHIP

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TABLE OF CONTENTS

I. Introduction 4
A. Overview of Short-Term MTW Goals and Objectives
B. Overview of Long-Term MTW Goals and Objectives

II. General Operating Information 8
A. Housing Stock Information
B. Leasing Information
C. Waiting List Information

III. Proposed MTW Activities 18

IV. Approved MTW Activities 22
A. Implemented Activities
B. Not Yet Implemented Activities
C. Activities on Hold

V. PLANNED APPLICATION OF MTW FUNDS 58

VI. ADMINISTRATIVE 62

VII. Appendices 63
Appendix A: Board Resolution
Appendix B: Certification of Compliance
Appendix C: Documentation of Public Process
Appendix D: Community Based Rental Assistance (CBRA) Policy
Appendix E: Planned Additional Agency Activities for FY 2027
Appendix F: RAD Significant Amendment
Appendix G: Lobbying Disclosures
Appendix H: FSS Incentive Payout Points
Appendix I: Challenging Barriers and Milestone Program

I. Introduction

A. Overview of Short-Term MTW Goals and Objectives

In 2006, INLIVIAN was selected as one of the 39 original housing authorities nationwide to participate in the U.S. Department of Housing and Urban Development (HUD) Moving to Work (MTW) Demonstration program. In November 2024, the MTW agreement was extended for an additional ten years through 2038.

INLIVIAN's MTW designation enables it to waive specific statutes and HUD regulations, thereby increasing housing choices for low-income families, encouraging households to pursue self-sufficiency, and enhancing administrative and operational cost-effectiveness. This authority allows INLIVIAN to test new methods to improve housing services and better meet the dynamic and ever-changing needs of the greater Charlotte-Mecklenburg area.

INLIVIAN's MTW designation, in short, allows policies to be implemented that reach beyond traditional forms of housing assistance. MTW is essential to INLIVIAN's day-to-day operations as we continue to achieve our mission of creating innovative housing solutions in desirable communities for residents of diverse incomes and facilitating access to services that help them succeed.

In Fiscal Year 2027, INLIVIAN will:

- Continue strengthening organizational capacity in real estate development expertise, private property management, and other entrepreneurial initiatives that diversify revenue streams and generate non-governmental resources.
- Advocate for affordable housing solutions and engage elected officials, community stakeholders, and industry partners to further position INLIVIAN as an innovative public-private enterprise and trusted community development partner.
- Continue investing in staff training, leadership development, and organizational culture to foster collaboration, innovation, knowledge sharing, and professionalism consistent with leading public, nonprofit, and private-sector organizations.
- Collaborate with City, County, State, and private-sector partners to leverage resources and expand mixed-income and workforce housing opportunities that support a broader housing continuum serving families across diverse income levels.
- Strengthen supportive service partnerships and resident-focused initiatives that promote housing stability, economic mobility, self-sufficiency, digital access, and improved quality of life for INLIVIAN-assisted households.
- Continue advancing operational innovation and strategic flexibility through the use of data-informed decision-making, technology modernization, and MTW flexibilities to improve organizational effectiveness and resident outcomes.

B. Overview of Long-Term MTW Goals and Objectives

The Charlotte Housing Authority was founded in 1939 and rebranded as INLIVIAN in 2019 to reflect our Vision and Mission Statements. Inspired by the word enliven, which means to "restore to life, give life to," INLIVIAN restores communities, restores hope to people priced out of the housing market, and reflects our mission to help people live successful lives.

To carry out our mission of creating innovative housing solutions in desirable communities for residents of diverse incomes and facilitating access to services that help them succeed, INLIVIAN has launched three separate entities that form a fully functional "Family of Companies."

Horizon Development Properties (HDP) is INLIVIAN's nonprofit development company. HDP is guided by a mission to develop, operate, and provide housing in sustainable communities of choice for residents of diverse incomes. They embody this mission by developing and managing a high-quality, affordable rental housing portfolio for families throughout the Charlotte-Mecklenburg area.

Blue Horizon Management Company (BHMC) is INLIVIAN's property management company. Its mission is to manage sustainable and economically diverse communities, promoting high-quality standards for our residents and owners.

Creating Opportunity for Resident Empowerment (CORE) is INLIVIAN's nonprofit supportive services entity and the heartbeat of the organization. CORE provides supportive services to INLIVIAN residents by assessing their needs and coordinating enriching, resident-focused programs that assist and encourage them along the path to economic and social independence.

INLIVIAN's forward-thinking leadership has developed the following long-term strategic goals to increase the supply of diverse price-point housing and improve the quality of life for our residents:

GOAL 1

Elevate the Customer Experience by Providing a Culture of Service Excellence.

Excellent customer service is the hallmark of a successful organization. INLIVIAN emphasizes providing excellent customer service to its residents, voucher holders, staff, housing providers, contractors, development partners, and the public. This can be a successful virtual visit to the INLIVIAN website or an in-person visit to INLIVIAN's headquarters. INLIVIAN will work to enhance its customer experience by developing and implementing an ongoing system for gathering and responding to customer feedback.

GOAL 2

Preserve, Develop, and Acquire Diverse Price Point Housing.

INLIVIAN facilitates the creation of housing at different price points to sustain and enhance communities by leveraging workforce and market-rate housing to serve low- and moderate-income housing in the same development. INLIVIAN will place an additional focus on utilizing its real estate assets to expand the supply of permanent, mixed-income apartments in Charlotte, ensuring its viability and more effectively serving of the Charlotte community's needs. INLIVIAN has set a goal of preserving or creating apartments at diverse price points through the acquisition, rehabilitation, and development of a permanent workforce, market-rate, and affordable units in desirable neighborhoods.

GOAL 3

Create and Enhance Diverse Income Streams to Support INLIVIAN's Mission.

INLIVIAN has a long and successful track record of leveraging private investment in its affordable housing stock, making it an attractive candidate for additional private funding. As part of its organizational transformation and creation of its subsidiary companies, INLIVIAN has developed expertise in development, technology, property management, asset management, bond monitoring, social services, and other areas.

INLIVIAN will operate fee-for-service through its subsidiary companies to other government, non-profit, and for-profit entities. By successfully utilizing RAD and MTW flexibilities, INLIVIAN can continue to foster innovation and evolve into a visionary agency that can better compete in the area's competitive market.

GOAL 4

Develop and Maintain Meaningful, Mutually Beneficial External Partnerships that Further INLIVIAN's Mission.

This new INLIVIAN structure will enable the agency to utilize resources more flexibly and enter into more mutually beneficial partnerships. Empowered by MTW, INLIVIAN is uniquely positioned in the Charlotte metro region to strategically engage in cross-sector partnerships with allies in education, health, social services, and workforce development, thereby maximizing the impact of social investments for INLIVIAN participants. With these coordinated efforts, the multiple barriers often faced by our participants on the road to self-sufficiency can be better addressed.

GOAL 5

Refresh INLIVIAN's Communication Strategy to enhance the public's understanding of INLIVIAN's important role in addressing current housing challenges and engage stakeholders in advocacy efforts that further INLIVIAN's mission.

INLIVIAN will continue its advocacy campaign to foster a greater understanding of the complexity of the affordable housing problem in Charlotte and increase the probability that sufficient public support can be generated to protect important housing subsidy programs on the federal, state, and local levels. INLIVIAN will educate partners and the broader community about its mission by continuing to implement strategies that engage others in its advocacy efforts for increased funding to facilitate the development of additional affordable housing and supportive services. INLIVIAN will need more allies to successfully maintain current subsidy levels in this challenging budget climate and an environment of growing demand for agency services.

GOAL 6

Acquire, Retain, and Develop Top Talent

Our people are one of our most valuable assets. As a viable competitor in the talent market, INLIVIAN must focus on rapidly developing its workforce skills and the capabilities of emerging leadership candidates to shape top talent. Our talent management efforts will focus on acquiring, retaining, and developing the necessary talent to achieve our goals.

To this end, INLIVIAN will focus on four talent management initiatives:

- We will recruit a diverse workforce that meets the agency's needs.
- We will provide comprehensive development and engagement programs to help staff and managers attain professional growth and accomplish their goals.
- We will provide the necessary tools that prepare our staff for internal and external environmental changes.
- We will ensure our compensation and performance management processes align with staff performance and organizational goals.

II. General Operating Information

A. Housing Stock Information

Planned New Public Housing Units

ASSET MANAGEMENT PROJECT (AMP) NAME AND NUMBER	BEDROOM SIZE						TOTAL UNITS	POPULATION TYPE*	Section 504 Accessible Units	
	0	1	2	3	4	5+			Mobility	Hearing & Vision
N/A	0	0	0	0	0	0	0	N/A	0	0
N/A	0	0	0	0	0	0	0	N/A	0	0
N/A	0	0	0	0	0	0	0	N/A	0	0

Total Public Housing units to be added in the plan year: 0

Planned Public Housing Units To Be Removed

PROPERTY NAME	NUMBER OF UNITS TO BE REMOVED	EXPLANATION FOR REMOVAL
N/A	0	

Total Public Housing units to be removed in the plan year: 0

INLIVIAN's last remaining Public Housing site was demolished and disposed through the Section 18 process in June 2024. INLIVIAN intends to use the vacant land for a future affordable housing development. INLIVIAN does not plan to close out its Public Housing Program. INLIVIAN will utilize its full Faircloth authority to develop additional units under the Faircloth-to-RAD framework.

Planned New Project-Based Vouchers

Tenant-based vouchers that INLIVIAN anticipates project-basing for the first time during the Plan Year. These include only those in which an Agreement to enter into a Housing Assistance Payment (AHAP) will be in place by the end of the Plan Year.

PROPERTY NAME	NUMBER OF VOUCHERS TO BE PROJECT-BASED	RAD? (Yes/No)	DESCRIPTION OF PROJECT
Allegheny Crossing	55	No	INLIVIAN is authorized under its MTW CBRA program to project-base Section 8 assistance at agency-owned or affiliated properties, subject to HUD subsidy layering requirements. Under this authority. Under this authority, INLIVIAN intends to project-base 55 vouchers at the proposed Allegheny Crossing
Oak Valley, Family	47	No	INLIVIAN is authorized under its MTW CBRA program to project-base Section 8 assistance at agency-owned or affiliated properties, subject to HUD subsidy layering requirements. Under this authority. Under this authority, INLIVIAN intends to project-base 47 vouchers at the proposed Oak Valley Redevelopment
Oak Valley, Senior	76	No	INLIVIAN is authorized under its MTW CBRA program to project-base Section 8 assistance at agency-owned or affiliated properties, subject to HUD subsidy layering requirements. Under this authority. Under this authority, INLIVIAN intends to project-base 76 vouchers at the proposed Oak Valley Redevelopment
Vue at Honeywood	27	No	INLIVIAN is authorized under its MTW CBRA program to project-base Section 8 assistance at agency-owned or affiliated properties, subject to HUD subsidy layering requirements. Under this authority. Under this authority, INLIVIAN intends to project-base 27 vouchers at the proposed Vue at Honeywood development.
Little Rock	60	No	INLIVIAN is authorized under its MTW CBRA program to project-base Section 8 assistance at agency-owned or affiliated properties, subject to HUD subsidy layering requirements. Under this authority. Under this authority, INLIVIAN intends to project-base 60 vouchers at Little Rock

PROPERTY NAME	NUMBER OF VOUCHERS TO BE PROJECT-BASED	RAD? (Yes/No)	DESCRIPTION OF PROJECT
Atrium- The Pearl	19	No	INLIVIAN is authorized under its MTW CBRA program to project-base Section 8 assistance at agency-owned or affiliated properties, subject to HUD subsidy layering requirements. Under this authority. Under this authority, INLIVIAN intends to project-base 19 vouchers at Atrium- The Pearl.
City / LISC MOU	36	No	INLIVIAN entered into a Memorandum of Understanding (MOU) with the City of Charlotte and the Local Initiatives Support Corporation (LISC) to increase the supply of affordable housing by way of project-based voucher subsidies as an additional strategy to maximize the agency's MTW authority to meet local housing needs. Under the MOU, INLIVIAN sets aside funding for project-based vouchers annually as part of the agency's existing HUD approved Community Based Rental Assistance (CBRA) policy. The PBVs are awarded using a previously competitive process, and the award of PBVs is contingent upon projects meeting HUD requirements, including but not limited to Environmental Review and Subsidy Layering Review approvals.

Planned Total Vouchers to be newly Project Based: 320

INLIVIAN is engaged in community development activities that leverage workforce (PBV, RAD, and Tax Credit) and market-rate housing to generate resources that support the creation of mixed-income developments. These efforts have been undertaken through INLIVIAN's development subsidiary, Horizon Development Properties (HDP), as well as Public-Private Partnerships (P3) and the use of Project-Based Vouchers and Local Non-Traditional activities to increase the supply of affordable housing in Mecklenburg County.

Planned Existing Project-Based Vouchers

PROPERTY NAME	NUMBER OF VOUCHERS TO BE PROJECT-BASED	Planned Status at End of Year	RAD?	DESCRIPTION OF PROJECT
7th Street Apartments	20	18 Leased/2 Issued	No	Family/Mixed Income
940 Brevard	100	93 Leased/7 Issued	Yes,40	Senior
Abbington on Mt. Holly	26	24 Leased/2 Issued	No	Family/Mixed Income
Arbor Glen 50	25	23 Leased/2 Issued	Yes,25	Family/Mixed Income
Arbor Glen I	60	55 Leased/5 Issued	Yes,60	Family/Mixed Income
Arbor Glen II	40	37 Leased/ 3 Issued	Yes, 40	Family/Mixed Income
Arbor Glen III	12	11 Leased/1 Issued	Yes, 12	Family/Mixed Income
Archdale Flats	36	33 Leased/3 Issued	Yes, 36	Family/Mixed Income
Archdale Seniors	7	6 Leased/1 Issued	No	Senior
Ashley Flats (Flats at 2019)	8	7 Leased/1 Issued	No	Family/Mixed Income
Ashley Square @ SouthPark	36	33 Leased/3 Issued	Yes, 22	Family/Mixed Income
Autumn Place	68	63 Leased/ 5 Issued	Yes, 68	Senior
Barton South	28	28 Leased	No	Family
Cedar Knoll	49	45 Leased/4 Issued	Yes, 49	Family
Charlottetown Terrace	161	149 Leased/12 Issued	Yes, 161	Disabled
Cherry Gardens	11	10 Leased/ 1 Issued	No	Senior
Claremont	50	46 Leased/4 Issued	Yes, 50	Family
Eastway Crossing	36	34 Leased/ 2 Issued	No	Senior/VASH
Edwin Towers	176	164 Leased/12 Issued	Yes, 176	Senior
Everett House	10	9 Leased/ 1 Issued	No	Disabled
Evoke Living at Ballentyne	12	12 Leased	No	Family/Mixed Income
Fairhaven Glen	35	35 Leased	No	Family/Mixed Income
Fairmarket Square	16	14 Leased/ 2 Issued	Yes, 16	Family/Mixed Income
First Ward	132	122 Leased/ 10 Issued	Yes, 132	Family/Mixed Income
Freedom Flats	11	10 Leased/ 1 Issued	No	Family/Mixed Income
Gaston at North End	51	47 Leased/ 4 Issued	No	Family/Mixed Income/Supportive

PROPERTY NAME	NUMBER OF VOUCHERS TO BE PROJECT-BASED	Planned Status at End of Year	RAD?	DESCRIPTION OF PROJECT
Gladedale	49	45 Leased/ 4 Issued	Yes, 49	Family
Glen Cove	10	9 Leased/ 1 Issued	Yes, 10	Mixed Income
Hampton Creste	60	55 Leased/ 5 Issued	Yes, 60	Mixed Income/Supportive
Landing at Park Road	92	85 Leased/ 7 Issued	No	Senior
LaSalle at Lincoln Heights	50	37 Leased/ 3 Issued	No	Senior
Leafcrest	48	46 Leased/ 2 Issued	Yes, 48	Family
Little Rock	92	92 Leased	No	Family
Mallard Ridge	35	32 Leased/ 3 Issued	Yes, 35	Family
McAden Park	60	56 Leased/ 4 Issued	Yes, 30	Family, Mixed Income
McAlpine Terrace	26	24 Leased/ 2 Issued	Yes, 26	Senior/Mixed Income
McCreesh Place	90	84 Leased/ 6 Issued	Yes, 63	Supportive
McMullen Wood	21	20 Leased/ 1 Issued	Yes, 21	Family/Mixed Income
Meadow Oaks	32	30 Leased/ 2 Issued	Yes, 32	Family
Mill Pond	51	47 Leased/4 Issued	No	Mixed Income
Montgomery Gardens	20	19 Leased/ 1 Issued	Yes, 20	Family/Mixed Income
Moore Place I & II	120	112 Leased/ 8 Issued	Yes, 34	Family/Mixed Income/Supportive
Nia Point	29	27 Leased/ 2 Issued	Yes, 29	Family/Mixed Income
Oaks at Cherry	81	75 Leased/ 6 Issued	Yes, 81	Family
Park at Oaklawn	89	83 Leased/ 6 Issued	Yes, 89	Family/Mixed Income
Parktowne Terrace	163	152 Leased/11 Issued	Yes, 163	Senior
Prosperity Creek	156	145 Leased/11 Issued	Yes, 156	Senior
Residences at Renaissance I	31	29 Leased/2 Issued	Yes, 31	Family/Mixed Income
Residences at Renaissance II	67	62 Leased/5 Issued	Yes, 67	Family/Mixed Income
Retreat at Renaissance	90	84 Leased/6 Issued	Yes, 90	Senior
Rise on Clanton	80	74 Leased/6 Issued	No	Supportive
Rivermere	20	18 Leased/ 2 Issued	Yes, 20	Family/Mixed Income
Robinsdale	30	28 Leased/2 Issued	Yes, 30	Family
Savanna Woods	49	46 Leased/3 Issued	Yes, 49	Family

PROPERTY NAME	NUMBER OF VOUCHERS TO BE PROJECT-BASED	Planned Status at End of Year	RAD?	DESCRIPTION OF PROJECT
Seigle Point	120	112 Leased/8 Issued	Yes, 102	Family/Mixed Income
Seneca Woods	17	16 Leased/ 1 Issued	Yes, 17	Family/Mixed Income
South Oak Crossing	20	18 Leased/2 Issued	Yes, 20	Family/Mixed Income
Southside Homes	392	365 Leased/27 Issued	Yes, 392	Family/Mixed Income
Springcroft @ Ashley Park	18	16 Leased/2 Issued	Yes, 18	Senior
Springfield Gardens	22	20 Leased/2 Issued	Yes, 22	Family/Mixed Income
Steele Creek Seniors	120	111 Leased/ 9 Issued	Yes, 120	Senior/Mixed Income
Stonehaven East	24	22 Leased/ 2 Issued	Yes, 24	Family
Strawn Tower	170	158 Leased/12 Issued	Yes, 170	Senior
Sunridge	44	41 Leased/ 3 Issued	Yes, 44	Family
Tarlton Hills	50	47 Leased/ 3 Issued	Yes, 50	Family
Trella Uptown	69	69 Leased	No	Family
Victoria Square	31	29 Leased/ 2 Issued	Yes, 31	Family
Wallace Woods	48	45 Leased/ 3 Issued	Yes, 48	Family
Woodlawn House	104	97 Leased/ 7 Issued	Yes, 104	Senior
YWCA Families Together	10	9 Leased/ 1 Issued	No	Supportive/Family
Total	**4216**			

Planned Other Changes to MTW Housing Stock Anticipated During the Plan Year

In 2023, INLIVIAN relocated the last remaining residents of Dillehay Courts and removed the last public housing units from its real estate portfolio. The former Dillehay Courts site will be redeveloped in multiple phases. The first redevelopment phase, the Gaston at North End, opened in 2023. Phase II underwent demolition activities beginning in 2024. INLIVIAN plans to apply for a future HUD Choice Neighborhoods Implementation Grant or other HUD funding program to support the redevelopment of the former Dillehay Courts housing site into a high-quality mixed-income community that supports the City of Charlotte's priority of revitalizing the surrounding North Tryon neighborhood. Additionally, in January 2026, INLIVIAN converted its Little Rock property from the HUD Multi-Family Project-Based Rental Assistance (PBRA) Program to its Project Based Voucher program. As of September 2026, 81 PBV vouchers have been issued at the site. To preserve affordable housing in the Little Rock community, INLIVIAN will amend the PBV contract to add additional units as tenants utilize the mobility option with their Tenant Protection Voucher and vacate the unit.

General Description of All Actual Capital Expenditures During the Plan Year

INLIVIAN has converted all of its Public Housing stock to RAD Project-Based Vouchers and utilizes reserves for maintenance and repairs. Planned capital expenditures using MTW funding flexibilities for FY2027 are listed below:

Development	General Description	Planned Capital Expenditures
Hampton Creste	Interior renovations	$2,559,900
Vistas at 707	Interior renovations	$2,000,000
Parktown Terrace	HVAC Replacements	$513,000
Charlottetown	HVAC Replacements	$1,134,000
Strawn Towers	HVAC Replacements	$1,350,000
Nia Point	Exterior and interior renovations	$660,000
Springfield	Exterior and interior renovations	$632,500
Claremont	Interior renovations and new laundry facility	$605,000
Leafcrest	Exterior renovations	$390,500
McAden Park	Exterior and interior renovations	$294,250
Little Rock	Exterior renovations	$101,200
Edwin Tower	Interior renovations	$79,200
Southside Homes	Water heater replacements	$489,500
Landings at Park	Exterior and interior renovations	$77,000
Meadow Oaks	Exterior renovations	$110,000
Arbor Glen	Exterior renovations	$1,080,000

B. Leasing Information

Planned Number of Households Served

PLANNED NUMBER OF HOUSEHOLDS SERVED THROUGH:	PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED*	PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED**
Public Housing Units Leased	0	0
Housing Choice Vouchers (HCV) Utilized	99,000	8250
Local, Non-Traditional: Tenant-Based	1,488	124
Local, Non-Traditional: Property-Based	16,104	1342
Local, Non-Traditional: Homeownership	600	50
PLANNED TOTAL HOUSEHOLDS SERVED:	**117,192**	**9766**

LOCAL, NON-TRADITIONAL CATEGORY	MTW ACTIVITY NAME/NUMBER	PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED*	PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED*
Tenant-Based	CBRA (2009-3)	1,488	124
Property-Based	Development Protection Fund (2020-2)	16,104	1342
Homeownership	Homeownership (2016-1)	600	50

Anticipated Issues/Possible Solutions Related to Leasing

There are no anticipated issues regarding leasing to note for plan year 2027.

HOUSING PROGRAM	DESCRIPTION OF ACTUAL LEASING ISSUES AND SOLUTIONS
MTW Public Housing	N/A
MTW Housing Choice Voucher	There are no anticipated issues.
Local, Non-Traditional	There are no anticipated issues.

C. Waiting List Information

Waiting List Information Anticipated

WAITING LIST NAME	DESCRIPTION	NUMBER OF HOUSEHOLDS ON THE WAITING LIST	WAITING LIST OPEN, PARTIALLY OPEN OR CLOSED	PLANS TO OPEN THE WAITING LIST DURING THE PLAN YEAR
Federal MTW Housing Choice Voucher Program	Central waitlist type	547	Closed	No
PBV & RAD PBV Units	Site-based waitlist type	7,162	Partially Open	Yes

Please describe any duplication of applicants across the waiting list:

INLIVIAN utilizes site-based waiting lists for project-based voucher developments. This allows applicants to be on several site-based waiting lists simultaneously and increases housing options for the applicant.

Planned Changes to the Waiting List in the Plan Year

WAITING LIST NAME	DESCRIPTION OF ACTUAL CHANGES TO WAITING LIST
Federal MTW Housing Choice Voucher Program	INLIVIAN is evaluating whether to open the HCV waitlist. Currently, the list is closed for new applicants. A preference was established in the FY25 HCV Admin Plan amendment in accordance with PIH 2025-19 regarding EHV households. Additionally, in 2025, a Mainstream Voucher Waitlist was established.
PBV & RAD PBV Units	PBV waiting lists are opened and closed based on an analysis of historical turnover per site.

III. Proposed MTW Activities

2027-1 Flexible Occupancy Standards for Project-Based Voucher (PBV) Units

Statutory Objectives: Cost Efficiency

This activity supports the following MTW statutory objective:

Reduce cost and achieve greater costs effectiveness in Federal expenditures: maximizes utilization of existing PBV units and reduces the length of time units remain vacant while awaiting households that exactly match the unit size.

Increase housing choices for low-income families: expands housing opportunities by allowing eligible families to access available PBV units when appropriately sized units are unavailable.

Activity Description

INLIVIAN will implement a local occupancy flexibility policy for its Project-Based Voucher (PBV) program that permits households to lease a PBV unit that is one bedroom larger than their subsidy size determination when no appropriately sized PBV unit is available at the specific site.

Under this activity, households may be offered a PBV unit that is one bedroom larger than their subsidy size determination when no appropriately sized PBV unit is available at the property.
The oversized unit may only be offered when:

- The household meets INLIVIAN's minimum occupancy standards.
- No eligible applicants requiring the larger bedroom size are on the property-based waitlist.
- The unit has been made available to households on INLIVIAN’s Priority and Emergency waitlists, and no household has accepted the unit.
- Leasing the unit will not result in the displacement or denial of housing to a household requiring the larger bedroom size.
- The Property Management company requests the exception and receives approval from the PBV Manager prior to utilizing the waiver.
- The Property Management company demonstrates proper waitlist procedures have been followed. For example, the waitlist was open for 30 days, allowing new applications, and no eligible families applied.

This flexibility is intended to address situations in which a larger PBV unit is available for leasing, but there is no current demand for that unit size. Rather than allowing the unit to remain vacant,

INLIVIAN may lease the unit to an eligible household whose subsidy size determination is one bedroom smaller than the available unit.

For example, if a two-bedroom PBV unit becomes available and there are no eligible households requiring a two-bedroom unit awaiting placement, the unit may be offered to a household eligible for a one-bedroom unit. Similarly, if a three-bedroom PBV unit becomes available and there are no eligible households requiring a three-bedroom unit awaiting placement, the unit may be offered to a household eligible for a two-bedroom unit. In either scenario, placement into a larger unit will not result in a vacant bedroom.

Placements under this activity will be limited to one bedroom above the household's subsidy size determination. A household eligible for a one-bedroom unit may not be placed in a three-bedroom unit under this activity.

The family will continue to receive assistance in accordance with PBV program requirements. For households placed in an oversized unit under this activity, INLIVIAN will provide housing assistance payments (HAP) based on the unit-size contract rent for the PBV unit occupied by the family, regardless of the household's subsidy size determination. The family's tenant rent portion will continue to be calculated in accordance with applicable PBV program requirements. Families placed in an oversized unit under this activity may remain in the unit as long as they continue to comply with PBV program requirements and applicable occupancy standards.

Implementation Schedule

Milestone	Timeline
HUD Approval of MTW Activity	Year 1
Administrative Plan Revisions	Within 90 Days of Approval
Staff Training	Within 120 Days of Approval
Owner Notification	Within 150 Days of Approval
Activity Implementation	Within 180 Days of Approval

On-going Evaluation

INLIVIAN will monitor the effectiveness of the activity through annual reviews and performance reporting. The following metrics will be tracked:

Utilization Metrics

- PBV program utilization

Compliance Metrics

- Verification that no appropriately sized household was available at the time of placement.
- Compliance with minimum occupancy standards.

Cost Implications

Administrative Costs on an on-going basis are expected to be minimal. There will be initial administrative cost to implement the activity including HCV Administrative Plan changes, and owner communication.

There are no significant increases in HAP expenditures anticipated. The units eligible for this activity are already included as units in the PBV contract with INLIVIAN and the HAP is budgeted annually using the current year HAP payment standard for the unit size. The activity primarily addresses vacancy management rather than expanding assistance. Potential modest increases in HAP costs may occur when larger units have higher contract rents; however, these costs are expected to be offset by reduced vacancy losses and improved program utilization.

Impact Analysis

This activity is expected to generate positive outcomes for families, property owners, and INLIVIAN. Families will benefit from increased access to affordable housing opportunities and reduced wait times for placement in Project-Based Voucher (PBV) units. Property owners will benefit from reduced vacancy periods, improved occupancy rates, and enhanced financial stability resulting from more efficient utilization of available PBV units. INLIVIAN will benefit from improved utilization of its existing PBV inventory and more effective use of housing resources.

One potential risk associated with this activity is a temporary reduction in the availability of larger units if they are occupied by smaller households. To mitigate this risk, oversized placements will only be approved when there are no applicants on the waiting list who require the larger bedroom size. In addition, INLIVIAN will continue to monitor unit turnover and transfer activity to ensure that larger units remain available to appropriately sized households when demand exists.

Need/Justification for MTW Flexibility

Current PBV regulations at 24 CFR §983.260 require PHAs to ensure that families occupy units that are consistent with the PHA's subsidy standards. If a family occupies a unit that is larger than the appropriate size, the PHA must take action to move the family to a correctly sized unit or provide continued assistance through other means. This initiative is authorized in Attachment C, Section D-sub section 2.

As PBV developments age and turnover patterns change, situations arise where larger units remain vacant for extended periods while smaller-unit applicants remain on the waiting list. At the same time, there may be no households currently seeking the larger bedroom size.

Without flexibility, units may remain vacant unnecessarily, resulting in:

- Lost housing opportunities for eligible families;
- Increased vacancy losses for property owners;
- Reduced utilization of PBV resources; and
- Inefficient use of affordable housing inventory.

This activity allows INLIVIAN to fully utilize existing PBV units while ensuring larger units remain available whenever there is demand from appropriately sized households.

Rent Reform/Term Limit Information

The tenant portion will continue to be calculated using INLIVIAN's Rent Reform Activity.

IV. Approved MTW Activities

A. Implemented Activities

2025-1 Rental Assistance to Qualified Renters Affected by Involuntary Displacement

Statutory Objectives: Housing Choice

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval to implement this activity in the 2024 MTW Annual Plan; the activity was implemented in 2025.

Activity Description
This activity provides rental assistance to all qualified renters residing in INLIVIAN or its affiliates-owned or managed properties by providing tenant-based housing choice vouchers in the event of a property redevelopment. The goal is to ensure the families residing at INLIVIAN's properties can transition smoothly to other affordable housing options during redevelopment projects without experiencing housing instability.



This initiative is especially relevant for INLIVIAN-owned mixed-income developments where unsubsidized renters and subsidized renters may coexist. The properties' redevelopment could cause an unsubsidized household to be displaced. INLIVIAN will work with households throughout the Relocation process to identify those who would otherwise qualify for the HCV Program and offer them a Housing Choice Voucher to avoid being involuntarily displaced. INLIVIAN's Housing Choice Voucher team will work with the development partner to qualify families at the start of the property's redevelopment- relocation activity. If a Housing Choice Voucher is not readily available, the qualified household is placed on the HCV waitlist. INLIVIAN's HCV Administration Plan outlines that INLIVIAN

families facing involuntary displacement would be served as a priority from the waitlist. As with any redevelopment activity, households in good standing who were living at the site at the time of redevelopment will be eligible for a first right to return to the property.

Planned Non-Significant Changes:

There are no planned non-significant changes to this activity for FY 2027.

Planned Significant Changes

There are no planned significant changes to this activity for FY 2027.

2022-1 Modification of FSS Program

Statutory Objectives: Self Sufficiency

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval to implement Modification of FSS Program in the 2022 MTW Annual Plan. INLIVIAN requested a non-significant amendment in FY2023.

Description/Impact/Update:
INLIVIAN's Family Self-Sufficiency (FSS) Program is voluntary and offered portfolio-wide, including both site-based residents and HCV Program participants. Participants who enroll will select an FSS pathway from one of the following:

1. Housing/Homeownership
2. Asset Building/Financial Strength
3. Employment
4. Education/Training

Enrolled participants will receive one-on-one coaching and goal setting from a certified Life Coach to assist with successfully reaching short and long-term goals within the 5-7-year program term limit. This activity will give incentives to participating families in which the head of household is working, seeking work, or preparing for work by participating in job training, educational programs, or programs that assist people in obtaining employment and becoming economically self-sufficient.



The above pathways have an established set of tasks and goals that participants must reach to receive the incentive points within the selected pathway. The monetary payments will be made directly to the participant.

This program incentive approach provides immediate incentives aligned with tasks and goals that INLIVIAN believes will encourage program participation and, ultimately, participant success. Participants are eligible to receive pay-

out points within other FSS pathways if they have not exceeded their annual FSS incentive limits. Incentive payout points can range from $250-$1500 with an annual maximum incentive of $2,000. Refer to the FSS Incentive chart attached to this plan as Appendix H. INLIVIAN began educating residents on the new FSS Program and incentive structure in 2024, with full implementation commencing in 2025.

Planned Non-Significant Changes:

There are no planned non-significant changes to this activity for FY 2027.

Planned Significant Changes

There are no planned significant changes to this activity for FY 2027.

2022-2 Waiver of Mandatory Initial Inspections

Statutory Objective: Housing Choice, Cost Effectiveness

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval for the Waiver of Mandatory Initial Inspections activity in FY 2022. The activity was implemented in FY 2024.

Description Update:
INLIVIAN received approval to utilize the Safe Harbor Waiver for element(s) of the MTW activity as described in the MTW Operations Notice for COHORT 4.1. Waiver of Mandatory Initial Inspection (HCV). Using this authority, INLIVIAN has eliminated the requirement for an initial inspection under the following circumstances:

- the unit is less than five years old (as demonstrated by a temporary certification of occupant or certificate of occupancy provided by the landlord) or
- the unit passed an approved HUD inspection or equivalent inspection including HQS, NSPIRE-S or NSPIRE-V within the previous three years.

In addition to meeting one of the criteria above, the housing provider will be required to submit an Initial Inspection Self-Certification Form, signed by both the housing provider and the family, stating that the unit in question substantially complies with HUD's inspection standard. The HCV participant will be able to request an interim inspection.



Planned Non-Significant Changes:
In 2027, INLIVIAN will update this activity's language to include temporary certificates of occupancy to mirror its established CBRA policy.

Planned Significant Changes
There are no planned significant changes to this activity for FY 2027.

2020-1 (Replaced 2018-2, 2017-1) Modified Terms of Over-Subsidy

Statutory Objective: Housing Choice, Cost Effectiveness

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval for the Modified Terms of Over-subsidy activity in FY 2017. The activity was implemented in FY 2018 and was amended as a technical amendment in FY 2020.

Description Update:
In FY 2017, the definition of over-subsidy was modified in the tenant-based and traditional project-based voucher programs. Under this activity, HAP contract terminations occur if INLIVIAN has been paying $75.00 or less, or the equivalent of INLIVIAN's minimum rent, in monthly housing assistance payments (HAP) for 180 consecutive calendar days.

In RAD PBV communities where the RAD HAP contract rents are set below INLIVIAN's payment standard, the 180-day over-subsidy requirement will not apply until the family has reached 80% of the Area Median Income (AMI) for their family size. The participant can remain in the unit, and the unit will remain under the HAP contract until 180 days after the family's adjusted income reaches 80% of the Area Median Income (AMI). Tenants who resided in a contract unit at the time of RAD conversion are exempt from over-subsidy regulations.

In 2020, INLIVIAN amended the modified terms of the over-subsidy initiative to apply to RAD PBV new admissions, allowing the admission of applicants with incomes at or below 50% of the Area Median Income (AMI) whose total tenant payment (TTP) exceeds the HAP contract rent. Once housed, these families will be exempt from the 180-day over-subsidy requirement until the household-adjusted income reaches 80% of AMI. INLIVIAN will utilize its MTW waiver in place of the Zero HAP requirements in the RAD Supplement Notice 4B (PIH 2023-19).

Planned Non-Significant Changes:
There are no planned non-significant changes to this activity for FY 2027.

Planned Significant Changes
There are no planned significant changes to this activity for FY 2027.

2020-2 Development Protection Fund

Statutory Objective: Housing Choice

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval for the Development Protection Fund activity in FY 2020. The activity was implemented in FY 2021.

Description Update:
INLIVIAN will use its broader use of funds authority to ensure the long-term stability and viability of existing INLIVIAN and affiliate-owned rental housing properties. INLIVIAN has properties that need capital investment and others that potentially need re-syndication of tax credits to maintain the quality and quantity of units provided to low, very low, and extremely low-income seniors and families. In this activity, INLIVIAN will conduct detailed capital needs assessments, establish priorities for rehabilitation and refinancing, and explore options for upgrading units over a multi-year period. See Appendix E for a list of INLIVIAN's planned development and redevelopment activities.

Planned Non-Significant Changes:
Through this activity, INLIVIAN will provide preservation funding through its MTW Development Protection Fund to two (2) RAD properties, Nia Point and Montgomery Gardens. The properties are experiencing financial challenges resulting from RAD contract rents that are insufficient to support ongoing operating expenses and long-term property viability.

MTW funds will be used to preserve the affordability, financial stability, and physical condition of these developments and to ensure the continued availability of affordable housing opportunities for low-income families. This funding will support INLIVIAN's efforts to maintain the long-term sustainability of the properties while preserving the housing assistance currently provided at the sites.



This change does not modify the RAD HAP contracts, increase RAD contract rents, or alter resident eligibility or participation requirements.

Planned Significant Changes
There are no planned significant changes to this activity for FY 2027.

2020-3 Enhanced Briefing for Tenant Readiness

Statutory Objective: Housing Choice, Self Sufficiency

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval for the Enhanced Briefing for Tenant Readiness activity in FY 2020. The activity was implemented in FY 2021.

Description Update:
The enhanced briefing for tenant readiness is designed to empower families and prepare them for success as INLIVIAN clients, reliable tenants, and good neighbors. The enhanced briefing curriculum will be facilitated by CORE programs and implemented through formal partnerships with other organizations that will provide instructors/advisors with expertise in various areas, including but not limited to:

- housing search/outreach,
- housing provider/tenant relations,
- financial literacy,
- housekeeping and
- goal setting.



The enhanced briefing will entail up to an additional 4 hours of training with opportunities for questions and discussion. Following housing placement, participants will be invited back to participate in the STEPS to Economic and Personal Success courses.

Planned Non-Significant Changes:
There are no planned non-significant changes to this activity for FY 2027.

Planned Significant Changes
There are no planned significant changes to this activity for FY 2027.

2019-1 Housing Choice Provider Incentive Program

Statutory Objective: Housing Choice

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval for this initiative in FY 2019 and implemented it in FY 2019. In 2024, INLIVIAN restructured the incentives in response to housing provider recommendations.

Description Update:
INLIVIAN's Housing Choice Voucher (HCV) program has been negatively impacted by a severe shortage of affordable housing options and a competitive rental market in Charlotte. This makes it increasingly difficult for HCV applicants and participants to locate affordable housing.

In response to these local realities, INLIVIAN proposed this activity as an amendment to the FY 2019 MTW Plan. The Housing Provider Incentive program aims to recruit and retain landlords by incentivizing them to participate in the HCV Program, thereby increasing housing choice for voucher holders. INLIVIAN has implemented the following incentives:

- **Continuity Bonus (2019)-** Housing Providers will receive a vacancy payment if a unit remains on the HCV program and is released to an HCV participant within sixty (60) days. Continuity bonuses are processed after the HAP Contract for the new family is executed.
- **Risk Mitigation (2019)-**Housing Providers may receive risk mitigation funds if an HCV participant is recommended for program termination (e.g., evictions, unauthorized moves, participant violations) to assist with the costs associated with property damage and unpaid rent and fees after the deposit is applied. The Housing Provider must provide documentation of charges, including but not limited to invoices, receipts, and pictures.
- **Leasing Bonus (2023)-** To incentivize Housing Providers upon executing a HAP contract.

Planned Non-Significant Changes:
As of January 2026, INLIVIAN currently offers 3 Housing Provider Incentives. INLIVIAN will no longer offer the new unit leasing or holding bonus, as they have been consolidated into the Leasing Bonus Incentive, which provides an incentive to both existing and new housing providers when a new HAP contract is signed. This change was recommended by our Housing Provider Advisory Council and has been well-received by housing providers throughout the program.

Planned Significant Changes:
There are no planned significant changes to this activity for FY 2027.

2018-1 Self Certification of HCV Program Initial Inspections

Statutory Objective: Cost Effectiveness

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval for this initiative in FY 2018 and was implemented in FY 2018.

Description Update:
This activity allows a housing provider to submit a self-certification instead of a re-inspection when an initial inspection fails, and there are 10 or fewer unique non-life-threatening deficiencies. Photos and invoices are required as proof of correcting the deficiency and must be submitted within 30 days of the failed inspection report. The participant and the housing provider execute a self-certification of completion before executing a Housing Assistance Payment (HAP) contract.



Planned Non-Significant Changes:
In 2027, INLIVIAN will begin conducting NSPIRE-V inspections in its HCV program and will utilize the NSPIRE-S (Scoring) in its PBV program. Additionally, the title of this activity was updated to reflect the changes in HUD's inspection standards and provide flexibility for future changes.

Planned Significant Changes:
There are no planned significant changes to this activity for FY 2027.

2017-2 Interim Policy (formerly Imputed Earned Income)

Statutory Objective: Cost Effectiveness, Self Sufficiency

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval to implement Imputed Earned Income activity in the FY 2017 Annual Plan. The activity was implemented in FY 2018.

Description/Impact/Update:
In both the tenant-based and project-based voucher programs, INLIVIAN will not process an interim recertification three months prior to a recertification, three months after a recertification, or within three months after a lease-up, when there is a loss of income (except in cases of unintentional employment termination) for work abled households.

This activity was implemented for the April 2018 re-certifications and March 2018 transfer lease-ups. INLIVIAN currently only processes interim increases in income for households that are either minimum-rent households or are being recertified. Hardship cases will be referred to the INLIVIAN Hardship Committee and evaluated in accordance with the agency's Hardship Policy.

Due to the COVID-19 pandemic, INLIVIAN suspended this activity and utilized COVID waivers. Additionally, PH and HCV-4 Family Income and Composition: Interim Examinations and PH and HCV-5 Enterprise Income Verification (EIV) Monitoring were also suspended. INLIVIAN reactivated this activity in FY 2022.

In the FY 2025 plan, INLIVIAN updated the Interim policy to state that INLIVIAN will process an interim for program participants in cases of employment terminations only if there is a no-fault loss of employment (e.g., layoff, company closure, medical, care of a family member, etc.). Households qualifying for an interim will be placed on the last effective sanction period they were in before losing employment. If a household experiences an involuntary loss of employment, no interim rent adjustment will be processed, and the household will continue to be responsible for its share of the rent.

INLIVIAN intends to utilize its MTW waiver in place of HOTMA's 10% threshold for a participant's increased or decreased adjusted income. Currently, INLIVIAN does not conduct interims for changes in adjusted income unless the family will decrease to a lower rent band, or the family has an increase in income and is a minimum renter. All other increases in income are not processed until the next Annual Reexamination.

Planned Non-Significant Changes:
There are no planned non-significant changes to this activity for FY 2027.

Planned Significant Changes
There are no planned significant changes to this activity for FY 2027.

2017-3 Exception Payment Standards

Statutory Objective: Housing Choice, Self -Sufficiency

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval to implement Exception Payment Standards for FY 2017. The activity was implemented in FY 2017 and amended in FY 2023 to increase the exception payment standard limit.

Description/Update:
INLIVIAN originally received approval to implement exception payment standards above 120 percent of the Fair Market Rent (FMR) but not to exceed the lower of the comparable market rent or 150 percent of HUD's published FMR. In FY 2023, INLIVIAN amended the exception payment standard cap to the lower of the comparable market rent or 250% of HUD's published Fair Market Rent (FMR). This request was made based on data from the 2022 State of Housing Report conducted by UNCC. The UNCC report indicated that the most significant rent increases have occurred in the lower-priced segment of the market, with Class "C" properties experiencing an average increase of 87.7%, or 5.4% per year, from 2000 to 2022. Additionally, the report noted that Mecklenburg has the highest average effective rent at $1,567 in the Charlotte region, while Gaston, at $1,209, has the lowest effective rent as of 2022 YTD.

To assist families in achieving upward mobility, INLIVIAN has utilized research-based data to identify neighborhoods of opportunity characterized by low poverty rates, low crime rates, and access to improved services, including schools, transportation, and job opportunities. These may also include areas identified for redevelopment activities to prevent gentrification and preserve affordable housing options. INLIVIAN will also continue to work with experts in the field of mobility to refine mobility program services, participant requirements, and opportunity area designations.

To further de-concentration efforts and expand housing opportunities, INLIVIAN has developed a Choice Mobility program called Opportunity Housing Program (OHP). Families participating in OHP receive pre- and post-move training, as well as supportive services. Families are also provided voucher amounts up to 250% of the Fair Market Rent (FMR), based on the unit's location and opportunity designation. INLIVIAN will limit Opportunity Housing Program enrollment and size based on average rents in Opportunity Areas to serve substantially the same number of families. INLIVIAN will continue to use payment standards of up to 150% of the Fair Market Rent (FMR) for non-OHP voucher holders.

In the FY2026 MTW Plan, INLIVIAN further defined the areas eligible to receive an exception payment standard. These areas will include Difficult to Develop Areas (DDAs) or other high-cost areas where higher payment standards are warranted to expand or preserve affordable housing options. These areas may include neighborhoods identified for redevelopment activities to prevent gentrification and support community stability. Designations may rely on any of the following:

1. HUD's official metropolitan or non-metropolitan Difficult to Develop Areas and Qualified Census Tracts;

2. Areas recognized as high-cost or difficult-to-develop under the North Carolina Housing Finance Agency's LIHTC program;

3. Local or county redevelopment or revitalization areas, Opportunity Zones, or other official designations indicating elevated development costs or special need for preservation of affordable housing;

4. Any other federal, state, or local guidance that identifies neighborhoods where development or preservation of affordable housing is unusually challenging due to cost, land availability, or market conditions.

INLIVIAN may use these designations, individually or in combination, to establish exception payment standards that reflect the actual cost of providing housing in these areas while promoting equitable access and preventing displacement.

Planned Non-Significant Changes:
There are no planned non-significant changes to this activity for FY 2027.

Planned Significant Changes:
There are no planned significant changes to this activity for FY 2027.

2016-1 Homeownership Initiative

Statutory Objective: Housing Choice, Self -Sufficiency

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval to implement a Homeownership Program in the FY 2016 plan. In FY2024, INLIVIAN changed the monthly homeownership payment calculation for new program participants.

Description/Update:
In FY 2016, INLIVIAN implemented the Destination Homeownership Program for qualifying Housing Choice Voucher (HCV) and RAD Project-Based Voucher (RAD-PBV) participants who are eligible as first-time homebuyers, as defined by HUD, and have earned income, Social Security, or Supplemental Security Income (SSI). INLIVIAN's Destination Homeownership Program provides eligible households the opportunity to apply their existing housing assistance toward homeownership. Participation in the program does not guarantee mortgage qualification, financing approval, or the successful purchase of a home. Households remain responsible for meeting all applicable program requirements and outside lender requirements necessary to complete a home purchase.

General requirements for program participation include, but are not limited to, the following:

- Must be a Housing Choice Voucher (tenant-based) or RAD Project-Based Voucher (RAD-PBV) participant.
- Must meet HUD's definition of a first-time homebuyer.
- Must participate in the Destination Homeownership Program Orientation.
- Must complete a HUD-certified Homeownership Education and Counseling program.
- Must satisfy the financial readiness and program eligibility standards established by INLIVIAN for participation in the Destination Homeownership Program.

INLIVIAN shall establish and maintain administrative eligibility standards designed to promote successful and sustainable homeownership while meeting the demands of the local Charlotte market. These standards may include, but are not limited to:

- Minimum earned income requirements;
- Minimum participant savings or financial contribution requirements;
- Employment or acceptable fixed-income stability requirements;
- Credit, debt-to-income, reserve, and other mortgage readiness criteria;
- Participation in available local, state, or other down payment assistance programs; and
- Other financial readiness criteria determined necessary to support successful homeownership outcomes.

INLIVIAN may periodically revise these administrative standards based on local housing market conditions, mortgage lending practices, affordability, participant outcomes, funding availability, and program experience. Current administrative eligibility standards shall be maintained in policies and procedures established by INLIVIAN for the Destination Homeownership Program.

All households must attend a mandatory Destination Homeownership Program Orientation and complete a HUD-certified Homeownership Education and Counseling program. In addition, INLIVIAN's Destination Homeownership Program offers workshops and individualized counseling focused on budgeting, credit, the home-buying process, and the roles and responsibilities of lenders and realtors.

The Homebuyer Education Provider will assess each participant's mortgage readiness by reviewing tri-merge credit scores, debt-to-income ratio, employment history, reserves, and other financial factors that may impact mortgage qualification. Once determined to be mortgage-ready, participants complete an 8-hour homebuyer education workshop recognized by local down payment assistance providers. The amount of counseling provided is individualized and based on each participant's mortgage readiness assessment.

In FY 2025, INLIVIAN was approved to expand the Destination Homeownership Program to include a lump sum down payment assistance option. Eligible families may receive a lump sum down payment of up to $40,000 at the time of purchase. The assistance is provided as a second soft loan at a 2% interest rate and is forgiven at a rate of 10% per year over a 10-year period.
To qualify for the lump sum down payment assistance, families must first apply for and receive the maximum available assistance from all applicable local down payment assistance programs.

Planned Non-Significant Changes:
Since approval of the FY 2026 MTW Plan, INLIVIAN implemented an unplanned non-significant modification to the Destination Homeownership Program by updating the administrative financial readiness standards. Specifically, the Agency increased the minimum annual earned income requirement for households with earned income from $25,000 to $38,000 and increased the minimum participant savings requirement from $1,500 to $2,500.

These revisions were made to better align the program with current housing market conditions, mortgage underwriting practices, and the financial resources necessary to support successful and sustainable homeownership.

In addition, INLIVIAN has revised the activity description to clarify that future administrative financial readiness standards, including minimum income, savings, employment stability, mortgage readiness, and other program eligibility requirements, may be established and periodically updated through policies and procedures adopted by the Agency. Current administrative eligibility standards are maintained in policies and procedures established by INLIVIAN for the Destination Homeownership Program.

Planned Significant Changes

There are no planned significant changes to this activity for FY 2027.

2016-2 Triennial Re-examination

Plan Year Approved, Implemented, Amended:
The Triennial Re-examination activity was approved in FY 2016 and implemented in October of 2018. This activity was amended in 2020 to expand triennial reexaminations to non-elderly, non-disabled households.

Description/Update:
Effective October 2018, INLIVIAN implemented triennial re-examinations for elderly and disabled households in both the Housing Choice Voucher (HCV) and public housing programs. While HUD has extended the authority to conduct triennial re-examinations (recertifications) for elderly and disabled households, INLIVIAN used the agency's MTW flexibility to waive any Cost-of-Living Adjustments (COLA) between re-examinations.

INLIVIAN received approval, as an MTW technical amendment, to expand triennial recertifications for all public housing and Housing Choice Voucher participants (Tenant-Based and Project-Based).

INLIVIAN may adjust the frequency of setting payment standards and rent increases to account for the increased time between re-examinations. INLIVIAN will adjust recertification dates, as necessary, to distribute recertification caseloads. As of 2024, INLIVIAN will no longer perform criminal background checks at each scheduled re-examination.

Planned Non-Significant Changes:
There are no planned non-significant changes to this activity for FY 2027.

Planned Significant Changes:
There are no planned significant changes to this activity for FY 2027.



2016-3 (Replaced 2010-1) Rent Reform and Work Requirement

Statutory Objective: Cost Effectiveness, Self Sufficiency

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval to implement the Rent Reform and a Work Requirement activity in the FY 2010 annual plan. The activity was implemented in FY2011 and amended in FY 2016, FY 2023, and FY 2024.

Description/Impact/Update:
Rent simplification applies to INLIVIAN's Public Housing, Housing Choice Voucher, and RAD PBV. While the elderly and disabled are not required to participate in the work requirement, they must participate in rent reform/rent simplification.

In FY 2016, INLIVIAN amended the MTW Plan to indicate the work requirement for families that port into Mecklenburg County.

Work Requirement:
INLIVIAN believes it is essential to create a clear expectation that all applicants and participants who are non-elderly and non-disabled should be expected to work. To this end, INLIVIAN instituted a work requirement policy under which each non-elderly, non-disabled household is expected to earn $7,540 annually through employment. The tenants and participants of INLIVIAN have support under the Work Requirement Policy through CORE Programs. Certified Life Coaches are available to assist households with identifying strengths, removing barriers to employment, and achieving their goals towards self-sufficiency. At the time of implementation, a household earning less than $7,540 annually will have the work requirement waived for a period of up to 90 days or until they have found employment, whichever is sooner. For new admissions, employment will be verified at the time of admission, and all households must become compliant within 90 days of admission. All children under the age of 16 who have not graduated from high school or received their GED must be enrolled in school full-time.

Whenever a household enters a Sanction Phase, it will be referred to the CORE Program staff, where a Certified Life Coach will be available to assist and ensure the household remains in compliance with the Work Requirement Policy.

Due to economic and public health conditions caused by the coronavirus pandemic, INLIVIAN temporarily suspended enforcement of work requirements beginning in April 2020. INLIVIAN lifted the work requirement suspension in 2022 for all work-abled PBV households. Each household was given a 6-month waiver period and 90-day warning before any sanctions were applied for households not in compliance. In FY2024, INLIVIAN implemented annual recertifications for households found to be non-compliant with the work requirement policy.

In FY2025, INLIVIAN modified the Work Requirement Policy to reflect the following updates:

- The introductory compliance period was updated to 90 days.
- A household is considered in compliance with the Work Requirement Policy when the household is earning $7,540. This is equivalent to earning the current state minimum wage and working 20 hours a week.
- The Phase 1 and Phase 2 sanctions calculation methodologies were updated to reflect an imputed earned income of $7,540 and $15,080, respectively.
- Interims will be processed to bring a family into compliance.

Rent Reform:

In 2010, as part of our MTW initiatives, INLIVIAN revised the rent calculation to an income-based, stepped rent process with stepped escrow deposits. The income bands are $2,500, with the stepped rent being 30% at the low end of the range. For example, in an annual income band of $5,000 – $7,499, the low end of $5,000 is divided by 12 months of the year and multiplied by 30%. The total tenant payment required is $125. The annual adjusted income will be used to determine the income band. A flat ceiling rent was established at INLIVIAN Fair Market Rents (PBV units only) by bedroom size and is reviewed and updated annually in the fall. In 2018, INLIVIAN replaced the escrow deposit with two new incentive programs: The Challenging Barriers Program and the Milestone Program (See Appendix I.) The income bands used for rent calculation remain unchanged. As of January 2027, INLIVIAN's minimum rent is $100 per month.

Income earned by seasonal employment will be annualized if the employee has maintained employment for more than 60 days. Employees of temporary agencies will be converted to annualized status after an initial 30-day assignment.

INLIVIAN's Alternate Verification Activity, as approved via COVID-19-related technical amendment, extended new admission income verification validity to 180 days from the determination and effective date of the lease-up instead of 60 days. For annual recertification verifications, the age of verifications was extended from 120 days prior to the effective date of the action to 180 days after the effective date of the action. INLIVIAN updated its age of verification policy to state that verifications must be dated within 180 days of the effective date of the action or 180 days of INLIVIAN's request date.

Traditional medical and childcare deductions have been eliminated. Participants only need to verify enough non-reimbursable expenses to meet the requested deduction level listed below.

MEDICAL EXAMPLE	MEDICAL DEDUCTION	CHILDCARE EXPENSE	CHILDCARE DEDUCTION
$0 - $2,499	$0	$0 - $2,499	$0
$2,500 - $4,999	$2,500	$2,500 - $4,999	$2,500
$5,000 - $7,499	$5,000	$5000 - $7,499	$5,000
$7,500+	$7,500	$7,500+	$7,500

To further streamline administrative processes, in FY 2023, INLIVIAN amended the alternative verification feature of the agency's rent reform initiative to include the following changes:

- Fixed Sources of Income: Verification documents for fixed income sources will be valid for the entire calendar year in which the income is effective. For example, if an SS benefit letter is dated February 1, 2022, that benefit letter will be valid for any certification with an effective date in 2022.

- Asset Income: Income from assets with a combined value of less than $50,000 will be excluded. The triennial recertification will include self-certification for households with combined assets of $50,000 or less or third-party verification for assets exceeding $50,000.

- Verification Hierarchy: INLIVIAN reduced the verification hierarchy from a six (6) step process to a three (3) step process and no longer requires verification of income for households that have a combined household income of less than $4,999 (minimum renters). The new verification hierarchy is illustrated in the chart below:

Level	Verification Technique	Ranking
3	Upfront Income Verification (UIV) HUD and non-HUD systems, Written Third Party Verification, and Written Third Party Verification Form	Highest (Mandatory) HUD's Enterprise Income Verification (EIV) system, UIV using non-HUD systems, written third party, and written third party verification form can all be used to supplement EIV-reported income sources and when EIV has no data; Mandatory when tenant disputes EIV-reported employment and income information when total combined household income exceeds $4,999.
2	Oral Third-Party Verification	Medium-Low (Mandatory if written third-party verification is not available when total combined household income exceeds $4,999)
1	Tenant Declaration	Low (Use as a last resort when unable to obtain any third-party verification when total combined household income exceeds $4,999)

This alternate verification activity will extend to all HCV programs, including MTW vouchers, Family Unification Program vouchers, Mainstream Program vouchers, Portables, Traditional and RAD PBVs, VASH vouchers, and Emergency Housing Vouchers.

In FY 2024, INLIVIAN was approved to utilize its MTW Rent Reform waiver in place of the following HOTMA provisions:

- HOTMA's 10% adjusted income increase/decrease threshold for conducting Interim Reexaminations.
- HOTMA increased the allowance for unreimbursed health and medical care expenses from 3% of annual income to 10%, phased in over two years.
- HOTMA's provision that permits PHAs to grant hardship relief to families unable to pay rent because of unanticipated medical/disability expenses and families who are no longer eligible for the childcare expense deduction.

Currently, INLIVIAN does not conduct interims for changes in adjusted income unless the family will decrease to a lower rent band, or the family has an increase in income and is a minimum renter. All other increases in income are not processed until the next Annual Reexamination.

Planned Non-Significant Changes:
There are no planned non-significant changes planned to this activity for FY 2027.

Planned Significant Changes:
There are no planned significant changes to this activity for FY 2027.

2016-6 Modified Definition of Elderly

Statutory Objectives: Housing Choice

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval to modify the definition of elderly from 62 or older to 55 or older during the FY 2016 plan year. The initiative was implemented with RAD conversions in 2016.

Description/Update:
The definition of elderly families for eligibility in the Project-Based Voucher Programs has been modified from head, co-head, or spouse aged 62 and older to head, or co-head or spouse aged 55 and older. This activity enables INLIVIAN to expand housing choice for near-elderly households at senior developments.

Planned Non-Significant Changes:
There are no planned non-significant changes to this activity for FY 2027.

Planned Significant Changes:
There are no planned non-significant changes to this activity for FY 2027.





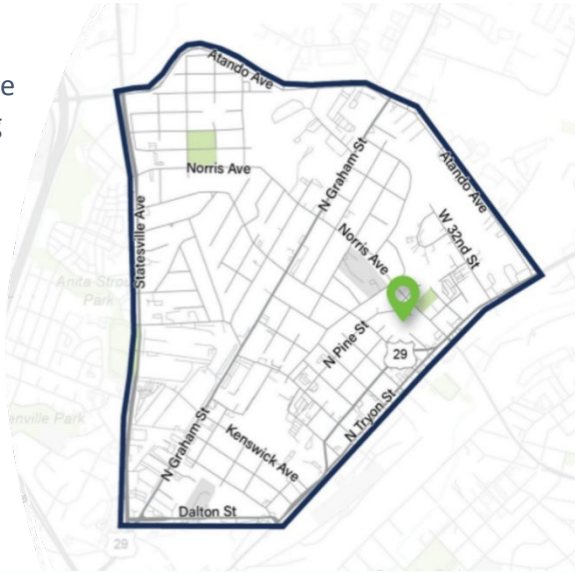
2011-3 New Construction of Affordable Units

Statutory Objectives: Housing Choice

Plan Year Approved, Implemented, Amended:
The activity was approved in March 2010 as a first amendment to the FY 2011 plan. The activity was implemented in FY 2011 and was amended as New Construction of Affordable Units to serve a broader scope, which garnered approval in the FY 2012 annual plan.

Description/Impact/Update:
INLIVIAN proposes to redevelop the 100% extremely low-income properties in our portfolio into mixed-income communities. The projects will include units intended for a wide range of income levels, from market rate to affordable units to those earning less than 30% of Area Median Income (AMI). Adding the units on the higher end of the income band will preserve some extremely low-income units by making the community sustainable and viable. It will increase housing choices for those needing affordable housing.

INLIVIAN plans to apply for a future HUD Choice Neighborhoods Implementation Grant or new HUD Housing Production grant to support the redevelopment of the former Dillehay Courts housing site into a high-quality mixed-income community and the revitalization of the surrounding North Tryon neighborhood. A broader list of planned new development activity can be found in Appendix E.



Planned Non-Significant Changes:
There are no planned non-significant changes to this activity for FY 2027.

Planned Significant Changes:
There are no planned significant changes to this activity for FY 2027.

2009-3 Community Based Rental Assistance

Statutory Objectives: Cost Effectiveness, Self Sufficiency, Housing Choice

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval to implement the Community Based Rental Assistance program during the FY2009 plan year. The initiative was implemented during the first quarter of FY 2009 and expanded in the FY 2011 annual plan. In the 2024 plan, INLIVIAN was approved for a waiver of the 20% PBV threshold.

Description/Impact/Update:
INLIVIAN operates a Community Based Rental Assistance (CBRA) program, also known as the Project-Based Voucher Program. The CBRA program encompasses Traditional Project-Based vouchers, Special Needs units (elderly, disabled, supportive service, and homeless), and Local Rental Subsidy programs. The CBRA policy applies to units converted to PBV under the Rental Assistance Demonstration (RAD) program.

There is no annual benchmark for this activity because INLIVIAN's Board of Commissioners approves CBRA projects and program partnerships on a case-by-case basis. Annual PBV commitments are reviewed during the agency's Policy and Client Relations Committee, and annual PBV awards are approved through the agency's annual budget process. In selecting families to occupy Project-Based Voucher apartments, INLIVIAN has delegated the determination of program and project eligibility to the PBV owner/agent. However, INLIVIAN's standards must still be met.

INLIVIAN may delegate to the owner/agent the full responsibility of administering all aspects of the CBRA program. This includes waiting list selection and administration, eligibility, admissions, and functions related to continued occupancy to include, but not limited to, regularly scheduled recertification, interim recertification, and transfer moves at the property level based on the community's approved tenant selection plan and the Administrative Plan. The owner/agent is also authorized to administer informal hearing processes provided that no-cause evictions are not permitted, and all policies and practices comply with fair housing and other related requirements.

Traditional Project-Based Voucher Activity

In FY 2009, INLIVIAN was approved to implement a Community Based Rental Assistance program. The activity was implemented in FY 2009 to simplify the selection process and maximize the number of quality Project-Based Voucher units throughout Charlotte. INLIVIAN revised the current CBRA Policy to increase further efforts to deconcentrate poverty and expand housing and economic opportunities.

Supportive Housing Project-Based Activity

In FY 2009, INLIVIAN was approved to implement Housing for Persons with Disabilities, Special Needs, and Homeless. The activity was implemented in FY 2009. The activity enables INLIVIAN to expand its role in the supportive housing community by leveraging funding and resources for social services and supportive housing providers. This will help alleviate the existing housing burden and increase the income-based housing opportunities in the Charlotte community.

This activity has impacted Charlotte's supportive housing projects by enabling local agencies to produce additional units for the targeted population to fill a void in Charlotte's continuum of care. Without INLIVIAN's fund leveraging or resource commitment, projects may be delayed or not occur.

PROPERTY NAME	PBV	RAD-PBV	Total	DESCRIPTION OF PROJECT
Everett House	10	0	10	Permanent Supportive Housing
McCreesh Place	27	63	90	Permanent Supportive Housing
Moore Place	86	34	120	Permanent Supportive Housing
RISE on Clanton	80	0	80	Permanent Supportive Housing
YWCA Families Together Program	10	0	10	Transitional Housing
Total	**213**	**97**	**310**	

Through MTW flexibility, INLIVIAN allows supportive housing programs to operate on a month-to-month lease rather than requiring them to modify their program to comply with HUD regulations requiring 12-month initial leases. This is significant with respect to non-compliance and participant termination. INLIVIAN may also designate certified NSPIRE Supportive Housing staff as HCV Inspectors, as described in the Implement a Single Platform for Inspections activity and HCV Administrative Plan, to conduct initial/new move-in inspections. Supportive Housing sites must have a track record of passing initial inspections to be designated as approved HCV Inspectors. This flexibility is significant because it aligns with the fundamental goal of rapid re-housing by reducing the amount of time a person is homeless.

Local Rental Subsidy Activity

The activity was approved in FY 2011 as a second amendment to the Plan. The activity was implemented in FY 2011. INLIVIAN awards partner agencies with an allocation of tenant-based vouchers to house families participating in intensive supportive services.

INLIVIAN may grant special admissions to referrals from partner agencies participating in the Local Rental Subsidy Program and admit families that are not on the HCV waiting list or without considering the family's position on the HCV waiting list. However, referrals that are on the HCV waiting list will have preference. Families referred to INLIVIAN by partner agencies must meet HCV eligibility criteria and adhere to the partner's supportive services requirements for continued eligibility. Partner agencies participating in the Local Rental Subsidy program may impose voucher time limits based on their INLIVIAN-approved service delivery model. INLIVIAN is collaborating with four partners to implement the Local Rental Subsidy Program:

A. **A Stable Home (ASH)** is a collaboration with A Child's Place and INLIVIAN to provide stability for homeless school children and their families. ASH case managers identify and refer homeless families to participating schools for participation in the local Rental Subsidy Program. INLIVIAN provides case management to referrals that meet HCV eligibility and Family Self-Sufficiency/Moving Forward Supportive Services program requirements. INLIVIAN provides the flexibility for ASH's voucher allocation up to 34 vouchers based on their average utilization rate.

B. **Supportive Housing Communities (SHC)**, formerly known as Weyland II, receives 15 rental subsidies for chronically homeless families and individuals with disabilities. SHC transitioned from a site-based rental subsidy program at Weyland Apartments to a scattered-site program in 2016. SHC receives referrals for the SHC Local Rental Subsidy Program through Charlotte-Mecklenburg County's Continuum of Care. Coordinated Entry aims to connect individuals and families who are homeless or at imminent risk of becoming homeless to available shelter and housing resources in the Charlotte-Mecklenburg community. Supportive services are provided to families participating in the SHC Local Rental Subsidy Program. Families must comply with HCV requirements and SHC supportive services to continue eligibility.

C. **Roof Above,** formerly Urban Ministry Center (UMC), has received an allocation of 95 vouchers to serve chronically homeless families and individuals with disabilities. Referrals for the UMC Local Rental Subsidy Program are received through Charlotte-Mecklenburg County's Coordinated Entry process. Coordinated Entry aims to connect individuals and families who are homeless or at imminent risk of becoming homeless to available shelter and housing resources in the Charlotte-Mecklenburg community. Roof Above provides supportive services to households participating in the Local Rental Subsidy Program. Families must comply with HCV requirements and participate in UMC supportive services to maintain eligibility.

D. Freedom Fighting Missionaries, Inc.

Freedom Fighting Missionaries, Inc. has been awarded 10 vouchers to help formerly incarcerated or criminal justice-involved individuals with re-entry by achieving self-sufficiency through sustainable services and resources, including housing assistance. The organization's social workers identify and refer families to INLIVIAN staff for a voucher. Participants have a term limit of three years with the voucher and will receive supportive services from Freedom Fighting Missionaries. Families must comply with HCV requirements to maintain continued eligibility.

Planned Non-Significant Changes:

Please see Community Based Rental Assistance (CBRA) Policy Appendix D.

As of October 2026, INLIVIAN will not be issuing new vouchers at Hampton Creste to the SHIP program. Existing households will continue to receive services from the Salvation Army. Once a household exits the program, the unit will be returned to INLIVIAN's RAD-PBV portfolio.

Planned Significant Changes:

There are no planned significant changes to this activity for FY 2027.

2009-8 Land Acquisition for Future Use

Statutory Objectives: Housing Choice, Self Sufficiency

Plan Year Approved, Implemented, Amended:
The agency was approved to implement land acquisition for future affordable housing in FY 2009. The activity was implemented in FY 2009.

Description/Impact/Update:
This MTW flexibility allows INLIVIAN to acquire sites without prior HUD approval if the agency certifies that HUD site selection requirements have been met. This will enable INLIVIAN to be nimble and competitive in the market when opportunities become available. With INLIVIAN's plan to increase the number of affordable housing opportunities, acquiring land is an option to be considered. INLIVIAN continues to monitor the market for land opportunities to advance development efforts and provide new opportunities for housing choice.

Planned Non-Significant Changes:
There are no planned non-significant changes to this activity for FY 2027.

Planned Significant Changes:
There are no planned significant changes to this activity for FY 2027.

2008-3 Investment Policies Consistent with State Law Initiative

Statutory Objectives: Cost Effectiveness

Description/Impact/Update:
INLIVIAN proposed to adopt an investment policy consistent with state law in FY 2009 and was approved. The agency implemented the new activity in FY 2009.

INLIVIAN invests only in securities authorized under NC state law that allow the flexibility to invest productively and efficiently to achieve a safer, more liquid portfolio and obtain a competitive yield. INLIVIAN's investments are performed in accordance with HUD regulations and North Carolina Statutes. This activity has allowed INLIVIAN to achieve higher earnings on idle funds in a safer, more liquid environment. INLIVIAN's investment policy restricts amounts deposited or invested for different types of investments as a percentage of the overall portfolio.

Planned Non-Significant Changes:
There are no planned non-significant changes to this activity for FY 2027.

Planned Significant Changes:
There are no planned significant changes to this activity for FY 2027.

2008-7 Increase Acquisition and Rehabilitation of Existing Multi-Family Properties

Statutory Objectives: Cost Effectiveness, Housing Choice

Plan Year Approved, Implemented, Amended:
INLIVIAN received approval to increase the acquisition/rehabilitation of existing multi-family properties in the 2008 – 2009 MTW Annual Plan. Implementation began in FY 2009. In FY 2012, INLIVIAN received approval to expand this initiative to acquire and rehabilitate existing multi-family properties in mixed-income communities.

Description/Impact/Update:
INLIVIAN is anticipating the purchase of expiring tax credit units that are co-located with market-rate units. INLIVIAN will acquire and rehabilitate properties at the end of the tax credit compliance period but still have the extended use agreement. Demand for affordable housing outweighs the its supply in the Charlotte market, creating higher-than-average demand and limiting opportunities for acquisitions in the Charlotte market. However, INLIVIAN will continue to seek opportunities.

First Ward Place, INLIVIAN's first Hope VI, is a two-phase project containing 283 total units with RAD, tax credit, and unrestricted market units. The property is in a high-opportunity area, and preserving income-restricted units is a high priority. In 2020, INLIVIAN successfully attempted to purchase the asset and all member interests, becoming the sole member of the owner entity. INLIVIAN, through HDP, its non-profit subsidiary, is planning to recapitalize the asset in two phases; the first phase will be recapitalized in 2022 with 9% tax credits, commercial debt, and housing trust fund money. The disproportionate mix of affordable to market-rate apartments and the lack of rental income needed to stay current in the market with amenities have caused the market-rate units to become Naturally Occurring Affordable Housing or NOAH. Therefore, renovation is necessary to upgrade this site to a Class B. Phase 1 rehab was completed in 2024, and Phase 2 rehab commenced in 2025.

In FY2026, INLIVIAN purchased the investor members' interest in Ashley Square and Springcroft; its property management company, BHMC, assumed property management of the sites in 2026 as well.

INLIVIAN will pursue additional acquisition and rehabilitation activity at our Hampton Crest, Prosperity Creek Seniors, Steele Creek, Gladedale, Tarlton Hills, Little Rock, Residence at Renaissance, Retreat at Renaissance, CHA Towers (Edwin and Charlottetown), Strawn Tower, Parktowne Terrace, Seneca Woods, Centre South and 720 Morehead, etc. A broader list with rehabilitation details can be found in Appendix E.

Planned Non-Significant Changes:
There are no planned non-significant changes to this activity for FY 2027.

Planned Significant Changes:
There are no planned significant changes to this activity for FY 2027.

Special Purpose Vouchers with MTW Flexibilities

	Activity	VASH	FUV/FYI	Mainstream	NED	Tenant Protection
1	Flexible Occupancy Schedule 2027-1	N/A	N/A	N/A	N/A	N/A
2	Modification to FSS Program 2022-1	Applies	Applies	Applies	Applies	Applies
3	Waiver of Mandatory Initial Inspection 2022-2	Applies	Applies	Applies	Applies	Applies
4	Modified Terms of Over-Subsidy 2020-1	Applies	Applies	Applies	Applies	Applies
5	Enhanced Briefing for Tenant Readiness 2020-3	N/A	N/A	Applies	Applies	Applies
6	Housing Choice Provider Incentive Program 2019-1	Applies	Applies	Applies	Applies	Applies
7	Self Certification of HCV Program Initial Inspections 2018-1	Applies	Applies	Applies	Applies	Applies
8	Imputed Earned Income 2017-2	N/A	Applies	Applies	Applies	Applies
9	Exception Payment Standards 2017-3	Applies	Applies	Applies	Applies	Applies
10	Homeownership Initiative 2016-1	Applies	Applies	Applies	Applies	Applies
11	Triennial Re-cert 2016-2	Applies	Applies	Applies	Applies	Applies

Special Purpose Vouchers with MTW Flexibilities

	Activity	VASH	FUV/FYI	Mainstream	NED	Tenant Protection
12a	Rent Reform 2016-3	N/A	Applies	Applies	Applies	Applies
12b	Work Requirement 2016-3	N/A	Applies	N/A	N/A	Applies
13	Controlled Program Moves 2016-5	On Hold	On Hold	On Hold	On Hold	On Hold
14	Modified Definition of Elderly 2016-6	Applies	Applies	Applies	Applies	Applies
15	New Construction of Affordable Units 2011-3	Applies	N/A	N/A	N/A	Applies

Updated: September 2026

B. Not Yet Implemented Activities

All currently approved activities have been implemented.

C. Activities on Hold

ACTIVITIES ON HOLD					
Activity	**Description/Update**	**Plan Year**	**Implementation Date**	**Plan Year Activity was Placed on "Hold"**	**Reason Activity was Placed "on hold."**
2016-5 Controlled Program Moves	In an effort to create cost efficiencies in processing program moves, HCV participants were required to wait 18 months before moving from their subsidized unit.	2016	2016	2025	This activity was put on hold to evaluate its effectiveness in creating cost efficiency by limiting program moves.
2013-2 Biennial Agency-Wide Inspections	INLIVIAN began the first biennial inspections in November 2015 for all properties and units.	2013	November, 2015	2019	This activity is no longer applicable to MTW planning as HUD currently permits all housing authorities to conduct biennial inspections. However, INLIVIAN does not want to lose flexibility in the long term if HUD should reverse the broad approval of the general policy. This activity will be closed with the approval of the 2027-1 Alternative Inspection Schedule activity.

D. Closed Out Activities

CLOSED OUT ACTIVITIES					
Activity	**Description/Update**	**Plan Year**	**Implementation Date**	**Plan Year Activity was "Closed Out"**	**Reason Activity was "Closed Out"**
2016-4 Single Platform for Inspections	The activity allows INLIVIAN to utilize the UPSC and HQS inspection platforms in the HCV program.	2016	2017	2027	MTW Flexibility is no longer required as an activity as HUD has adopted the NSPIRE inspection platform.
2018-1 Self Certification of reinspection for HQS initials	The activity allows a self-certification instead of a re-inspection when an initial inspection fails and There are 10 or less different types of non-life-threatening deficiencies. Photos and invoices must be submitted within 30 days of the failed report.	2018	June, 2018	2021	MTW Flexibility is no longer required as activity is consistent with HOTMA implementation rule: Housing Opportunity Through Modernization Act of 2016—Housing Choice Voucher (HCV) and Project-Based Voucher Implementation; Additional Streamlining Changes, 85 Fed. Reg. 63664 (Oct. 8, 2020).
2008-2 Participant and Landlord Tracking	Through this activity, the agency began tracking the locations of Housing Choice Vouchers to inform data-driven results best aimed at increasing access to affordable housing prospects in higher opportunity areas.	2008-2009	January, 2008	2021	The activity was closed, as the work has been completed and implemented to support INLIVIAN's Opportunity Housing Program.
2015-1 Streamline Project-Based Voucher and Public Housing Regulations	This activity was pursued to streamline Project-Based (PBV) and Public Housing unit regulations in developments that house both.	2015	January, 2015	2019	INLIVIAN no longer has properties with PBV and PH in the same development after RAD conversion.

CLOSED OUT ACTIVITIES					
Activity	**Description/Update**	**Plan Year**	**Implementation Date**	**Plan Year Activity was "Closed Out"**	**Reason Activity was "Closed Out"**
2015-2 Public Housing No Assistance Termination Policy (Mixed-Income Communities Only)	This activity was pursued to allow terminations of public housing assistance for households no longer using the subsidy in mixed-income communities.	2015	January, 2015	2017	This activity has been combined with 2017-1-Modified Terms of Over Subsidy. It was closed out effective fiscal year-end 2016 (following HUD approval of the FY 2017 Plan and RAD Conversion).
2011-1 Acquisition of General Partnership Interest	This activity allowed the agency to acquire the General Partnership interest in the Little Rock Apartments.	2011	January, 2011	2016	Acquisition of property completed.
2011-2 Local Non-Traditional Initiatives	The activity allowed for supportive services partnerships.	2011	January, 2011	2018	The Supportive Housing Innovative Partnership (SHIP) units will now be considered Supportive Housing units under our Community Based Rental Assistance Policy.
2009-6 Youth Initiatives	This activity established a Cooperative Agreement to Form Partnerships with local education stakeholders to connect INLIVIAN participants to programs and services that address truancy, post-secondary education preparation, and academic improvement.	2009	January, 2009	2015	The Agreement has expired.
2008-2 Biennial Review Process for Elderly and Disabled	This activity allowed INLIVIAN to implement a biennial review process for elderly and disabled heads of households.	2009	January, 2010	2013	INLIVIAN subsequently implemented an agency-wide biennial process.
2008-5 Good Neighbor Training	The training was designed to assist families' acclimation to a neighborhood. Participants accessed training to learn more about being "Good Neighbors."	2008	January, 2008	2014	The training has been incorporated into initial briefing sessions for all heads of households.

CLOSED OUT ACTIVITIES					
Activity	**Description/Update**	**Plan Year**	**Implementation Date**	**Plan Year Activity was "Closed Out"**	**Reason Activity was "Closed Out"**
2008-2009 Development of Local Design Standards	This activity allowed for INLIVIAN to streamline design standards.	2009	January, 2011	2014	MTW flexibility is no longer necessary.
2007-2 Affordable Housing Impact Study	This activity allowed for a partnership with UNCC to research the pattern and density of affordable housing and evaluate the association between the housing stock and crime rate, housing and property values, and school equity in surrounding communities.	2007	January, 2008	2010	The study was completed, and findings have been initiated through other INLIVIAN programs.
2007-2008 Section 8 Property Rating System	A quantitative evaluation rating system for the exterior appearance of a Section 8 property was developed to improve the housing quality standards of participating property owners and encourage an increase in the percentage of high-quality HCV rental units.	2008	January, 2009	2011	The activity was discontinued due to costs versus the overall impact on housing choice families.
2009-5 Moving Forward Supportive Services	In FY2009, INLIVIAN was approved to implement Moving Forward Supportive Services. As of January 2018, Supportive Services are now provided to the entire INLIVIAN portfolio in conjunction with the agency-wide implementation of the Work Requirement Policy.	2009	2009	2024	This supportive services program was closed in 2024 to move to a single service delivery platform using the Modified FSS Program.

V. PLANNED APPLICATION OF MTW FUNDS

A. Planned Application of MTW Funds

Estimated Sources and Uses of MTW Funding for the Fiscal Year

FDS LINE-ITEM NUMBER	FDS LINE-ITEM NAME	DOLLAR AMOUNT
70500 (70300+70400)	Total Tenant Revenue	$0
70600	HUD PHA Operating Grants	$126,230,914
70610	Capital Grants	$2.176.902
70700 (70710+70720+70730+70740+70750)	Total Fee Revenue	$0
71100+72000	Interest Income	$0
71600	Gain or Loss on Sale of Capital Assets	$0
71200+71300+71310+71400+71500	Other Income	$4,901,802
70000	Total Revenue	$133,309,618

Estimated Application of MTW Funds

FDS LINE-ITEM NUMBER	FDS LINE-ITEM NAME	DOLLAR AMOUNT
91000 (91100+91200+91400+91500+91600+91700+91800+91900)	Total Operating - Administrative	$10,800,129
91300+91310+92000	Management Fee Expense	$2,933,258
91810	Allocated Overhead	$0
92500 (92100+92200+92300+92400)	Total Tenant Services	$4,184,380
93000 (93100+93600+93200+93300+93400+93800)	Total Utilities	$0
93500+93700	Labor	$0
94000 (94100+94200+94300+94500)	Total Ordinary Maintenance	$1,937,813
95000 (95100+95200+95300+95500)	Total Protective Services	$0
96100 (96110+96120+96130+96140)	Total Insurance Premiums	$27,156
96000 (96200+96210+96300+96400+96500+96600+96800)	Total Other General Expenses	$0
96700 (96710+96720+96730)	Total Interest Expense & Amortization Cost	$0
97100+97200	Total Extraordinary Maintenance	$0
97300+97350	HAP + HAP Portability-In	$100,020,976
97400	Depreciation Expense	$0
97500+97600+97700+97800	All Other Expense	$13,405,906
90000	Total Expenses	$133,309,618

Description of Planned Application of MTW Funding Flexibility

INLIVIAN continues to use MTW Single Fund Flexibility to support various housing programs and services and invest in development projects to further the agency's mission and strategic goals. The flexibility allows INLIVIAN to balance the funding needs among various programs to achieve higher outcomes that would otherwise be constrained by limited resources. Planned uses of MTW Single Fund Flexibility include supporting the following programs:

Housing Choice Voucher (HCV) Program

The HCV Program enables low-income families, the elderly, and the disabled to afford decent and safe housing in the private market. The HCV Program is a major use of MTW Single Fund Flexibility, which allows the agency to direct funding towards addressing specific local needs, such as increasing greater access to opportunity zones and increasing housing supply via housing provider incentives and outreach initiatives.

CORE, Inc. (CORE)

CORE consists of the Client Services Department, which delivers supportive services to residents to help them gain the necessary skills for success, intended to increase the residents' quality of life. The program's goal is to help families become financially stable and decrease their dependence on housing subsidies. Certified Life Coaches work with families to identify barriers and coordinate resources to address these barriers. MTW Single Fund Flexibility provides for CORE operating activities and special resources such as the following:

- **Participant Employment Services**

  CORE Programs aims to promote employment and self-reliance for our program participants in both our HCV and PBV programs. One of the barriers to employment that residents face is the need for job skills or training. To address this issue, CORE has partnered with Charlotte Works, Mecklenburg County's workforce development service provider. The partnership provides participants with access to necessary job placement services, job readiness, and skills training. Additionally, CORE has partnered with STRIVE CLT to provide program participants with basic computer literacy classes, aiding in closing the digital divide faced by INLIVIAN residents.

- **With Every Heartbeat is Life (WEHL) Program**

  The WEHL Program educates our residents on the importance of cardiovascular disease awareness, making healthy food selections, and physical activity. The WEHL Program strongly believes in the "each one, teach one" method, which means sharing what you learn with others. This method extends awareness as much as possible to public housing communities to promote better health choices and develop healthy communities.

- **Youth Services Program**
  CORE Youth Services department offers a robust youth development program that aims to provide the skills to prepare high school students for academic success in high school, college, and beyond. Over a school year, students participate in stimulating college and career readiness workshops and activities designed to develop intrinsic motivation and the confidence students need to be successful in their post-secondary future. Though the program focuses on improving academic success, it also inspires students to do their very best. The Youth Services department strives to reinforce self-motivation and personal responsibility and propel students toward academic excellence by holding to these standards.

Development Projects

MTW Single Fund Flexibility is used for development and revitalization projects to increase the supply of diverse-price point housing. INLIVIAN maintains its mission to expand quality affordable housing opportunities through these real estate development initiatives, which may include predevelopment, redevelopment, administrative costs related to the capital project, and other investments involving public-private partnerships.

Planned Application of Unspent Operating Fund and HCV Funding

Original Funding Source	Beginning of FY - Unspent Balances	Planned Application of PHA Unspent Funds during FY
HCV HAP*	$ 50,755,115	$ 23,076,050
HCV Admin Fee	$ 0	$ 0
PH Operating Subsidy	$ 17,228,977	$ 0
TOTAL:	$ 67,984,092	$21,076,050

Description or Planned Expenditures of Unspent Operating Fund and HCV Funding

Uses of unspent funds include the funding for (1) the development efforts of Trella Uptown and Centre South, (2) land acquisition, (3) redevelopment at Dillehay Courts, Grove Place, Oak Valley, Valley View, and Little Rock. INLIVIAN plans to apply for a future HUD Choice Neighborhoods Implementation Grant to support the redevelopment of the former Dillehay Courts housing site and adjacent Warehouse into a high-quality mixed-income community and the revitalization of the surrounding North Tryon neighborhood.

Capital and renovation projects will be funded at Ashley Square, Arbor Glen, Charlottetown, Claremont, Edwin Towers, Hampton Creste, the Landing at Park Road, Leafcrest, McAden Park, Meadow Oaks, Nia Point, Parktowne Terrace, Savanna Woods, Southside Homes, Springfield Gardens, Parktowne Terrace, Strawn Towers, the Vistas at 707, Wallace Woods and other properties.

Local Asset Management Plan

Is INLIVIAN MTW Allocating Costs Within Statute?
Yes.

Is INLIVIAN Implementing a Local Asset Management Plan (LAMP)?
Therefore, no LAMP documentation is provided in the Appendix. INLIVIAN does not plan or intend to make any associated changes during the plan year.

Has the MTW PHA provided a LAMP in the appendix?
N/A

If the MTW PHA has provided a LAMP in the appendix, please describe any proposed changes to the LAMP in the Plan Year or state that the MTW PHA does not plan to make any changes in the Plan Year.
N/A

Rental Assistance Demonstration (RAD) Participation

Description of RAD Participation
INLIVIAN has completed a RAD portfolio conversion of 3,284 units at 51 properties (BHMC-managed and third-party-managed).

Has INLIVIAN submitted a RAD Significant Amendment in the Appendix?
Yes, a copy is provided in Appendix F.

Is INLIVIAN Implementing the RAD Significant Amendment Submitted in the Appendix the First?
The original RAD Significant Amendment was introduced in the FY 2016 MTW Plan. The most recently submitted amendments were included in INLIVIAN's FY 2021 MTW Plan.

VI. ADMINISTRATIVE

A. Board Resolution and Certifications of Compliance

The signed Board Resolution is included in Appendix A of the Plan. Certification of Compliance is included in Appendix B of the Plan.

B. Documentation of Public Process

Documentation of the Public Process is listed in Appendix C of the Plan.

C. Planned and Ongoing Evaluations

INLIVIAN has transferred the evaluation contract from Community Science to AvachaTech LLC.
By utilizing AvachaTech, INLIVIAN aims to regularly examine MTW and related policy outcomes to determine whether policies meet the statutory requirements outlined by HUD and identify areas for improvement or streamlining.

D. Lobbying Disclosures

Appendix G of the Plan.

VII. Appendices

Appendix A: Board Resolution
Appendix B: Certification of Compliance
Appendix C: Documentation of Public Process
Appendix D: Community Based Rental Assistance (CBRA) Policy
Appendix E: Planned Additional Agency Activities for FY 2027
Appendix F: RAD Significant Amendment
Appendix G: Lobbying Disclosures
Appendix H: FSS Incentive Payout Points
Appendix I: Challenging Barriers and Milestone Program

INLIVIAN
HOUSING REDEFINED

Appendix A: Board Resolution

INLIVIAN
HOUSING REDEFINED

Appendix B: Certification of Compliance

INLIVIAN
HOUSING REDEFINED

Appendix C: Documentation of Public Process

FY2027 Moving to Work Annual Plan

Public Comment Documentation

Public Comment Period

October 1, 2026 to October 30, 2026

Meetings and Hearings

September 28th:	Draft sent to the Resident Advisory Council
October 5th:	Distribution to the INLIVIAN Board of Commissioners
October 20th:	Public Hearing at the INLIVIAN Board of Commissioners meeting
November 3rd:	INLIVIAN Policy and Client Relations Committee Presentation

Publishing and Posting

September 30th:	Notice published in La Noticia
	Notice published in Charlotte Observer
	Draft plan published on INLIVIAN website
	Draft plan made available at INLIVIAN main office
October 1st:	Notice published on INLIVIAN and BHMC Resident Portals

INLIVIAN NOTICE OF PUBLIC HEARING

ACTION: Notice of public comment period and public hearing.

SUMMARY: INLIVIAN has released a draft of the ***Fiscal Year 2027 Moving to Work (MTW) Annual Plan***.

Participation in the Federal MTW program allows INLIVIAN exemptions from existing public housing and voucher rules and provides funding flexibility associated with Federal housing dollars. The ***Fiscal Year 2027 MTW Annual Plan*** will communicate how the agency looks to utilize the benefits of the MTW program for fiscal year 2026.

PUBLIC COMMENT: The public comment period will begin on October 1, 2026, and end on October 30, 2026. Written comments will be accepted via email at mtw@inlivian.com .

PUBLIC HEARING: The public hearing will be held virtually and via the phone on October 20, 2026, at 5:30 p.m. To join the public hearing or to sign up to speak on this matter, please contact the INLIVIAN Customer Service Call Center at 704-336-5183.

To access the draft plan in person, please visit the INLIVIAN Administrative Office located at 400 East Boulevard and all INLIVIAN/Blue Horizon managed properties (by request) beginning October 1, 2026.

To access the draft plan online, visit the INLIVIAN website at www.INLIVIAN.com under Moving to Work: https://www.inlivian.com/movingtowork/.

REASONABLE ACCOMMODATION REQUESTS: INLIVIAN is committed to providing equal access to this event for all participants and residents with disabilities. If you need a reasonable accommodation or sign language interpreter service, please contact our ADA/504/Language Department at 704-336-8413 to initiate a request. Please allow at least 3 business days to make the necessary arrangements. If you need a foreign language translator, please contact our ADA/504/Language Department at 704-336-8413. Please allow at least 5 business days to make the necessary arrangements.

INLIVIAN NOTICE OF PUBLIC HEARING

INLIVIAN NOTICE OF PUBLIC HEARING

ACTION: Notice of public comment period and public hearing.

SUMMARY: INLIVIAN has released a draft of the Fiscal Year 2027 Moving to Work (MTW) Annual Plan.

Participation in the Federal MTW program allows INLIVIAN exemptions from existing public housing and voucher rules and provides funding flexibility associated with Federal housing dollars. The Fiscal Year 2027 MTW Annual Plan will communicate how the agency looks to utilize the benefits of the MTW program for fiscal year 2026.

PUBLIC COMMENT: The public comment period will begin on October 1, 2026, and end on October 30, 2026. Written comments will be accepted via email at mtw@inlivian.com .

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Aviso de Audiencia Pública

Acción: Aviso de período de comentarios públicos y audiencia pública

Resumen: Inlivian ha publicado el borrador del **Plan Anual "Moving to Work" (MTW) para el Año Fiscal 2027.**

La participación en el programa federal MTW le otorga a Inlivian exenciones de la normas existentes de vivienda pública y vales, además de proporcionar flexibilidad de financiamiento asociada con los fondos federales de vivienda. El Plan Anual MTW para el Año Fiscal 2027 comunicará cómo la agencia busca aprovechar los beneficios del programa MTW para el año fiscal 2026.

Comentarios públicos: El período de comentarios públicos comenzará el 1 de octubre del 2026 y finalizará el 30 de octubre del 2026. Se aceptarán comentarios por escrito por correo electrónico en mtw@inlivian.com

Audiencia pública: La audiencia pública se llevará a cabo de manera virtual y telefónica el 20 de octubre del 2026 a las 5:30 p.m. Para unirse a la audiencia pública o registrarse para hablar sobre este asunto, comuníquese con el Centro de Atención al Cliente de INLIVIAN al 704-336-5183.

Para acceder al borrador del plan en persona, visite la Oficina Administrativa de INLIVIAN ubicada en 400 East Boulevard o cualquiera de las propiedades gestionadas por INLIVIAN/Blue Horizon (previa solicitud) a partir del 1 de octubre del 2026.

Para acceder al borrador del plan en línea, visite el sitio web de INLIVIAN en **www.INLIVIAN.com** en la sección Moving to Work: **https://www.inlivian.com/movingtowork/**.

Solicitudes de adaptación razonable: INLIVIAN se compromete a brindar igualdad de acceso a este evento a todos los participantes y residentes con discapacidades. Si necesita una adaptación razonable o servicios de intérprete de lenguaje de señas, comuníquese con nuestro Departamento de ADA/504/Idiomas al 704-336-8413 para iniciar la solicitud. Por favor, solicítelo con al menos 3 días hábiles de anticipación para realizar los arreglos necesarios. Si necesita un traductor/intérprete de un idioma extranjero, comuníquese con nuestro Departamento de ADA/504/Idiomas al 704-336-8413 con al menos 5 días hábiles de anticipación para realizar los arreglos necesarios.

Appendix D: Community Based Rental Assistance (CBRA) Policy

COMMUNITY BASED RENTAL ASSISTANCE (CBRA) POLICY

Overview

INLIVIAN's Community Based Rental Assistance (CBRA) program (also known as the project-based voucher program) encompasses traditional project-based voucher units, Special Needs units (elderly, disabled, supportive housing, supportive service, and homeless), and pilot local rental subsidy programs. INLIVIAN will determine the percentage of housing choice voucher assistance that is project-based under the CBRA program based on organizational strategic goals and public housing authority and/or City/County revitalization efforts. The CBRA policy is also applicable to units converted to PBV under the Rental Assistance Demonstration (RAD) program.

Simplification of the Process to Project-Base Units

INLIVIAN will utilize a simplified owner proposal selection process to project-base vouchers. INLIVIAN will select CBRA proposals by any of the following methods:

Units Owned by INLIVIAN. INLIVIAN is authorized to project-base Section 8 assistance at properties owned directly or indirectly by the Agency, subject to HUD's requirements regarding subsidy layering. Project-based assistance for such owned units does not need to be competitively bid, nor are the owned units subject to any assessments for voluntary conversion. Direct or indirect ownership interest includes, but is not limited to:

- INLIVIAN participation as a member in a tax credit or other LLC;
- Direct or indirect ownership interest through an INLIVIAN subsidiary;
- INLIVIAN ownership of the land on which the community has been or is to be developed; or
- INLIVIAN is funding a portion of the construction costs of the community and subsidizing the operating costs or rents of the community for low income families.

Request for Proposals. INLIVIAN may solicit proposals by using a request for proposals (RFP) process. The RFP process will select proposals on a competitive basis. INLIVIAN will not limit proposals to a single site or impose restrictions that explicitly or practically preclude owner submission of proposals for project-based housing on different sites.

Proposals that were Previously Selected Based on Competition. INLIVIAN may consider an application and select a proposal for housing assisted under a federal, state, or local government housing assistance, community development, or supportive services program (e.g. Low-Income Housing Tax Credit (LIHTC), HOME, Housing Trust Fund, Affordable Housing Program, etc.) that included a competitive process. INLIVIAN may consider such applications only if housing was competitively selected within three years of the proposal selection date and where the earlier competitive proposal did not involve any consideration that the project would receive project- based voucher assistance.

Joint Requests for Proposals with the City and State. INLIVIAN may award project-based voucher assistance via competitive process for other affordable housing funds to maximize the impact of its project-based vouchers and to minimize the number of application processes developers face.

Solicitation and Selection of Proposals

INLIVIAN will accept proposals on an ongoing basis. INLIVIAN may periodically advertise its request for proposals (RFP) for the target categories in Procureware. In addition to, or in place of advertising, INLIVIAN may also directly contact specific owners that have already been selected through one of the competitive processes above to inform them of available project-based assistance.

In order for the proposal to be considered, the proposal must respond to all requirements as outlined in the RFP. Incomplete proposals will not be reviewed.

INLIVIAN will rate and rank proposals for in the target categories using the following criteria:

Family Units

1. Must be located in a permissible area which meet INLIVIAN's goals and objectives including but not limited to deconcentrating poverty, expanding housing and economic opportunities. Preference will be given to proposals in which units are located in a High Opportunity Area that is characterized by: low poverty, low crime rate, access to high performing schools, access to transportation, access to employment opportunities and areas of redevelopment in order to preserve affordable housing options in gentrifying neighborhoods.

2. Families must have one member either working or participating in a work support program.

3. No more than 25% of the units in a family development will be project-based unless the development is providing some level of supportive services. (This does not apply to senior and special needs housing).

4. Developments in neighborhoods within a mile of one of Charlotte's new transportation corridors, including light rail, will be given second priority.

Special Needs Units

1. Category includes units for homeless, disabled, domestic violence, transitional youth and other special needs.
2. Services must be being provided onsite or in coordination with the housing. Higher levels of service provision will be given first priority.
3. Must be located in a permissible area which meet INLIVIAN's goals and objectives including but not limited to deconcentrating poverty, expanding housing and economic opportunities. Preference will be given to proposals in which units are located in a High Opportunity Area

that is characterized by: low poverty, low crime rate, access to high performing schools, access to transportation, access to employment opportunities and areas of redevelopment in order to preserve affordable housing options in gentrifying neighborhoods. Developments in neighborhoods within a mile of one of Charlotte's new transportation corridors, including light rail, will be given second priority.

Senior Units

1. Must be located in a permissible area which meet INLIVIAN's goals and objectives including but not limited to deconcentrating poverty, expanding housing and economic opportunities. Preference will be given to proposals in which units are located in a High Opportunity Area that is characterized by: low poverty, low crime rate, access to high performing schools, access to transportation, access to employment opportunities and areas of redevelopment in order to preserve affordable housing options in gentrifying neighborhoods.

2. Developments in Uptown Charlotte or in neighborhoods within a mile of one of Charlotte's new transportation corridors, including light rail, will be given second priority.

3. Services must be provided onsite or in coordination with the housing. Higher levels of service provision will be given priority if the locational criteria rank equally.

In addition to meeting the above criteria, each deal must meet HUD Site Selection Standards set forth in CFR 983.57. Each deal must also be in compliance with HUD subsidy layering rules, the Fair Housing Act, Davis-Bacon regulations for new construction and all other applicable HUD regulations.

Priority will be given to proposals in any target category that complement other local activities such as the redevelopment of a public housing site under the HOPE VI program, the HOME program, CDBG activities, other development activities in a HUD-designated Enterprise Zone, Economic Community, or Renewal Community.

Program Cap

In 2024, INLIVIAN received a waiver of 24 CFR 983.6 Maximum amount of PBV assistance in order to develop and/or subsidize more than 20 percent of the agency's authorized ACC units. This waiver will expand housing options for low-income families in Charlotte's tight rental market by ensuring long-term affordability of units.

Prohibition of Assistance for Certain Units

INLIVIAN will determine property eligibility criteria and may provide project-based assistance for transitional housing and other innovative housing types to address Charlotte's affordable housing needs.

Cap on the Number of Project-Based Units

INLIVIAN will provide project-based assistance for excepted units in multifamily buildings that are specifically made available for elderly or disabled families or families receiving supportive services on a project-by-project basis with MTW and/or HUD approval.

In Supportive Housing developments (homeless, disabled, domestic violence, transitional youth, and/or special needs) with less than 20 units, INLIVIAN will provide project-based assistance up to 100% of the units in the project. Services must be provided in the coordination of housing for supportive housing developments. The types of services offered to families for a project to qualify for the exception will be determined on a project-by-project basis depending on the target population. Supportive Housing developments may use the McKinney Act definition of disabled for the purposes of determining eligibility for exempted units.

INLIVIAN will require reports to be submitted at least quarterly for supportive housing developments (excluding elderly and disabled developments) to ensure proper monitoring of excepted units.

In family developments or transitional housing programs, families must be receiving FSS supportive services or other self-sufficiency services to qualify for an excepted unit. INLIVIAN, contract service provider, and/or supportive service partner will monitor the excepted family's continued receipt of supportive services and take appropriate action regarding those families that fail without good cause to complete their supportive services requirement. INLIVIAN will require reports to be submitted at least quarterly for family developments to ensure proper monitoring of excepted units.

Site Selection Standards

Per INLIVIAN's MTW Agreement, the Authority is authorized to duly adopt, according to the requirements of local law, alternate standards for determining the location of existing, newly constructed or substantially rehabilitated housing to receive subsidy; provided, however, that in lieu of the Site Selection Standards currently set forth in 24 C.F.R. Section 983.57, the agency will comply with the following requirements:

a. The Agency will comply with the Fair Housing Act and Title VI of the Civil Rights Act of 1964, and implementing regulations thereto, in determining the location of newly constructed or acquired public housing units.

b. Units may be located in the agency's jurisdiction, including within, but not limited to, the following types of urban areas: (1) an area of revitalization that has been designated as such by the City of Charlotte and/or Mecklenburg County, including Redevelopment Areas and Enhanced Enterprise Communities, (2) an area where public housing units were previously constructed and were demolished, (3) a racially or economically impacted area where the agency plans to preserve existing affordable housing, (4) in connection with a HOPE VI or other HUD funded master planned development, (5) in areas where a needs analysis indicates

that subsidized housing represents a low percentage of the total number of housing units in the area or (6) relocating units to an area with a lower concentration of public housing units.

c. Conduct a housing needs analysis indicating that there is a real need for the housing in the area; and

d. When developing or substantially rehabilitating six or more Section 8 project-based units, the agency will: (1) advise current residents of the subject properties and representative community groups in the vicinity of the subject property by letter to resident organizations and by public meeting, of the agency's revitalization plan and (2) certify to HUD in its MTW Annual Report that the comments from residents and representative community groups have been considered in the revitalization plan. Documentation evidencing that the agency has met the stated requirements will be maintained at the housing authority and submitted to HUD in its MTW Annual Report.

It is the goal of INLIVIAN to select sites for CBRA housing that provide for deconcentrating poverty and expanding housing and economic opportunities. In complying with this goal, INLIVIAN will limit approval of sites for project-based housing in census tracts that have poverty concentrations of 20 percent or less.

However, INLIVIAN will grant exceptions to the 20 percent standard where INLIVIAN determines that the project-based assistance will complement other local redevelopment activities designed to deconcentrate poverty and expand housing and economic opportunities in census tracts with poverty concentrations greater than 20 percent, such as sites in:

- A census tract in which the proposed development will be located in a HUD-designated Enterprise Zone, Economic Community, or Renewal Community;
- A census tract where the concentration of assisted units will be or has decreased as a result of public housing demolition and HOPE VI redevelopment;
- A census tract in which the proposed development will be located is undergoing significant revitalization as a result of state, local, or federal dollars invested in the area;
- A census tract where new market rate units are being developed where such market rate units will positively impact the poverty rate in the area;
- A census tract where there has been an overall decline in the poverty rate within the past five years; or
- A census tract where there are meaningful opportunities for educational and economic advancement.

Additionally, INLIVIAN will strive to get as many CBRA units as possible in stable Charlotte neighborhoods, neighborhoods where there is an and/or neighborhood along Charlotte's new transportation corridors, including the light rail. Priority will be given to developments that meet one or more of the following goals:

- Located in an area of low crime as determined by local law enforcement;
- Located in an area with access to high-performing public schools; or
- Located in neighborhoods within a mile of one of Charlotte's new transportation corridors, including light rail.

Inspecting Units

INLIVIAN will waive the requirement for an initial HUD standard inspection on newly constructed project- based units and utilize a Temporary Certificate of Occupancy (TCO) or Certificate of Occupancy (CO) in lieu of an initial inspection.

Site-Based Administration

INLIVIAN's CBRA program may utilize simplified property management practices based on private management/private sector models instead of the traditional public housing authority managed project-based voucher model in order to simplify, streamline and enhance the delivery of management services to CBRA communities. INLIVIAN may delegate to the Owner Entities' professional management companies the full responsibility of administering all aspects of the CBRA program. This includes waiting list selection and administration, eligibility, admissions, and functions related to continued occupancy to include but not limited to regularly scheduled recertifications, interim recertifications and transfer moves, at the property level based on the community's approved tenant selection plan and INLIVIAN's Administrative Plan. The Owner Entities' property management is also authorized to administer grievance processes provided that no-cause evictions are not permitted, and all policies and practices comply with fair housing and other related requirements.

Lease

INLIVIAN may waive the initial one-year lease requirement in Supportive Housing development and programs.

Family Right to Move

INLIVIAN has received a waiver of 24 CFR 983.260 Family Right to Move, so that a family will not be offered the opportunity for continued tenant-based rental assistance if they terminate the lease at any time after one year of occupancy. Exceptions to the waiver may be made for:

- Occupancy of a wrong size unit due to change in family composition and property does not have an available unit that meets occupancy standards for the family's size;
- Reasonable accommodation;
- Victims of domestic violence, dating violence, or stalking;
- Owner's refusal to renew the lease without good cause; and
- Tenants that occupied RAD -PBV units the time of conversion

Determining Rent to Owner

INLIVIAN has an approved waiver of 24 CFR 983.301 in order to implement a more market competitive determination of rent to owner process for the Community Based Rental Assistance (CBRA) program in order to:

- Create affordable housing developments through public/private partnerships using market principles that maximize the economic viability and sustainability of INLIVIAN's mixed-income communities.
- Meet INLIVIAN's goals and objectives including but not limited to deconcentrating poverty, expanding housing and economic opportunities.
- Facilitate self-sufficiency among low-income families by increasing access to community resources and amenities that improve quality of life.

INLIVIAN's determination of rent to owner process may determine contract rents on a project-by-project basis up to 120% of HUDs fair market rents (FMRs) based on independent market study and analysis. Exceptions to the INLIVIAN Payment Standards may be granted with Administration approval based on the following factors:

- The quality of the housing regardless of the submarket.
- The location of the housing with respect to its proximity to revitalization/transformation activities and other public development initiatives.
- INLIVIAN's de-concentration efforts.
- INLIVIAN's RAD portfolio conversion.

INLIVIAN
HOUSING REDEFINED

Appendix E: Planned Additional Agency Activities for FY 2027

FY 2027 PLANNED ADDITIONAL AGENCY ACTIVITIES

PLANNED SITE DEVELOPMENT ACTIVITIES

Tall Oaks

Phase II of the Tall Oaks Redevelopment will continue to be pursued as designs are refined for a multifamily development planned for the remaining 2.7-acre site. Current plans being discussed with the neighbors and City officials propose the development of 99 units, with a majority of units targeted to households between 60% and 80% of the area's median income to address the need for workforce housing in the neighborhood. MTW funds will be used for predevelopment expenditures on Tall Oaks II.

Tarlton Hills

HDP continues to explore options available to redevelop the site of this 50-unit 100% RAD development near Uptown Charlotte. This site is very valuable because of its views of the Charlotte skyline, but obsolete because of its current density. The City of Charlotte planning staff is currently engaged in a small area planning process for this area of the city. A local foundation has engaged and is paying two planners to develop concepts for the neighborhood, including the Tarlton Hills site. HDP intends to collaborate with other adjacent owners and take the lead in drafting a Request for Qualifications for a master developer to bring the developed concepts to fruition. INLIVIAN will use MTW funds to capitalize on the predevelopment work and relocation of current residents.

As part of any redevelopment, HDP will also look to potentially execute a Transfer Of Assistance ("TOA") of the RAD operating subsidies to other communities HDP is developing through joint venture agreements in Public Private Partnerships ("P3"). The TOA will be necessary to vacate the 100% extremely low-income units in the community to prepare the site to be redeveloped as a mixed-income community with increased density that is reflective of diversified price point housing. During the extended predevelopment phase, INLIVIAN will utilize MTW funding and reserves to ensure the building envelope remains in good condition, in addition to upgrading the A/C system to be in compliance with NSPIRE standards. Temporary relocation of residents will be required while renovations are underway. A third-party relocation consultant will be engaged as part of this project to support residents and ensure all Unified Relocation Act ("URA") requirements and benefits are adhered to and provided.

Strawn Cottages

A partnership with The Fallon Group, the site now known as Centre South, has broken ground in Q2 of 2026. The first residential building is under construction. Once complete, it will offer 329 mixed-income apartments serving families with incomes at or below the Very Low- and Low-Income Area Median Incomes (AMIs). This is the first building in a multi-phase development including retail, office building and additional residential building serving families from 30% AMI to Market.

Gladedale Apartments

INLIVIAN is pursuing opportunities to redevelop the existing 49 units at Gladedale. This site is obsolete because its location would allow for a much higher density to add workforce housing to the lower-income program at this parcel. INLIVIAN will use MTW funds to fund a predevelopment budget and relocation of current residents. As part of any redevelopment, HDP will also look to potentially execute a TOA of the RAD operating subsidies to other communities HDP is developing through joint venture agreements in P3s to vacate the 100% extremely low-income units in the community to prepare the site to be redeveloped as a mixed-income community with increased density that is reflective of diversified price point housing.

Hampton Crest

Hampton Crest is a mixed-income development that has outlived its reasonably expected life cycle. INLIVIAN intends to redevelop this site. The unit make-up includes 153 market-rate units that are Naturally Occurring Affordable Housing (NOAHs), along with 60 RAD Voucher units, for a total of 213 units. HDP will publish an RFP for Developer Partners for this site in the future to determine the development plan. Utilizing MTW Funding and reserves, HDP is performing various immediate needs work onsite, including select unit remediations, wood siding replacement, exterior stair replacements, and renovations at the office building. Temporary relocation of residents will be required while renovations are underway. A third-party relocation consultant will be engaged as part of this project to support residents and ensure all Unified Relocation Act ("URA") requirements and benefits are adhered to and provided.

Oak Valley

Oak Valley is a 50-unit apartment complex built in 1988. HDP intends to raze and redevelop Oak Valley using MTW program funds. The successful completion of this redevelopment will preserve this much-needed affordable housing for years to come. HDP plans to develop 264 residential units on this parcel—188 units at the Family site and 76 units at the Senior site. The redevelopment is envisioned as a mixed-income community that supports long-term neighborhood stability and reduces the effects of concentrated poverty. HDP is currently undertaking predevelopment activities for Phase I, with construction anticipated to begin in early 2027. Relocation efforts have been completed, with onsite families utilizing the recently approved Rental Assistance to Qualified Renters Affected by Involuntary Displacement initiative.

Valley View

Built in 1984, the 50 units at Valley View Apartments need extensive renovations. HDP intends to raze and redevelop Valley View using MTW program funds. Successful completion of this redevelopment will preserve this much-needed affordable housing for some years to come. Modeling this transaction will better inform the plan of action. Permanent relocation of residents occurred in 2026. A third party relocation consultant ensured all URA requirements were adhered to.

Grove Place

The Grove Place Apartments is a 36-unit family community located in the Hickory Grove area of Charlotte. Built in 1988, the original structural systems are light-frame wood construction with plywood sheathing on engineered roof trusses and sawn lumber floor framing. Grove Place has been experiencing severe structural deficiencies in the slabs, balconies, and exterior stairs and is in dire need of substantial renovations. It is HDP's intent to raze and redevelop Grove Place using MTW program funds to increase the number of affordable units and building and operational efficiency. Permanent relocation of residents occurred in 2026. A third party relocation consultant ensured all URA requirements were adhered to.

Seneca Woods

INLIVIAN, through its development arm HDP, continues to explore options available to redevelop this 50-unit mixed-income affordable development in the Park Woodlawn Neighborhood in Charlotte. This site is very valuable since it is located in an area of opportunity with access to good schools and employment. However, the site is obsolete physically and as it relates to its current density. It is also experiencing structural deficiencies that are causing the design team to advise demolition. Construction costs are high in Charlotte, and the rents have not caught up to the cost to build. Further, this is a small parcel, so structured parking would be required to build out this site fully to its zoning capacity. Structured parking is cost-prohibitive. As a result, redevelopment with higher density may not be an option, but HDP continues to vet this decision. The community came out of the tax credit extended use agreement in 2023. INLIVIAN will use MTW funds to fund a predevelopment budget and for the relocation of current residents. Utilizing the 2020-2 Development Protection Fund initiative, HDP corrected the structural concerns in 5 units to preserve the property until redevelopment options can be vetted.

Little Rock

Little Rock is a 242-apartment complex located in the West Boulevard corridor of Charlotte. In 2026, INLIVIAN transitioned the property from a HUD Multifamily contract to the Section 8 Project-Based Voucher program. The site is being considered for substantial rehabilitation or redevelopment of Little Rock Apartments using MTW program funds, including the cost to relocate residents. In 2024, INLIVIAN purchased the general partner interest in the property using MTW funds. Relocation of residents will be required while redevelopment are underway. A third-party relocation consultant will be engaged as part of this project to support residents and ensure all Unified Relocation Act ("URA") requirements and benefits are adhered to and provided.

Dillehay Courts

The former Dillehay Courts development was built in 1974 with 136 units located off of North Tryon Street at 28th and 30th Street. Redeveloping the 17.97-acre site into a mixed-income community would provide more housing units on the site that are functionally and aesthetically contemporary in design and energy efficiency. There is also an opportunity to better serve our residents with additional amenities and highly desired community features. The redevelopment efforts will occur in two phases. Phase I was completed in October 2023 with the opening of The Gaston at North End. The property features 144 units, of which 51 are affordable units housing those earning between 30% and 80% of the area's median income.

Horizon Development Properties began demolishing the additional units in 2023 in anticipation of additional catalytic redevelopment. INLIVIAN plans to apply for a future HUD Choice Neighborhoods Implementation Grant or another HUD-funded program, coupled with MTW funds, to support the redevelopment of the former Dillehay Courts housing site into a high-quality mixed-income community and the revitalization of the surrounding North Tryon neighborhood. In anticipation of the creation of a Small Area Plan with the City of Charlotte, INLIVIAN negotiated with Atrium Health Systems on a land swap to secure more land neighboring the newly developed Gaston at North End. As part of the land swap, INLIVIAN will be providing rental subsidies to Atrium for use as the Baxter Street and Dillehay Court developments.

Ashley Square at Ashley Park

In 2026, INLIVIAN acquired the managing members' and investor members' interest in Ashley Square, utilizing the agency's approved MTW Development Protection initiative. The property is a 176-unit apartment community that was developed with HOPE VI funds in 2009. Following the ownership transition, INLIVIAN plans to undertake major renovations of the property, including upgrades to the property's HVAC systems and amenities.

Autumn Place

Autumn Place is a 68-unit, 4-story seniors elevator building located in a highly desirable area of Charlotte. Built as part of the original 1993 Earle Village HOPE VI development, Autumn Place needs Renovations to preserve the asset. Through its Capital Projects, Autumn Place is undergoing substantial renovations to bring the building up to current code standards, utilizing MTW funding and property reserves.

Springcoft Senior Apartments at Ashley Park

In 2026, INLIVIAN acquired the investor members' interest in Springcroft Senior Apartments utilizing the agency's approved Development Protection initiative. The property is a 50-unit apartment community that was developed with HOPE VI funds. Conversations are ongoing to acquire the managing member's interest as well.

Seigle Point

INLIVIAN is in the process of partnering with a developer to rehabilitate Siegle Point, a 204-unit apartment community that was developed in 2008. The property will undergo substantial rehabilitation, and the transaction will be financed using Low Income Housing Tax Credits via NCHFA and Tax-Exempt Bonds issued by INLIVIAN. As part of this process, INLIVIAN will utilize its MTW resources to purchase the General Partnership member interest in the property. This property is also positioned to accept the Project-Based Rental Assistance (PBRA) funding from Little Rock to support 192 units at the site. Temporary relocation of residents will be required while renovations are underway. A third-party relocation consultant will be engaged as part of this project to support residents and ensure all Unified Relocation Act ("URA") requirements and benefits are adhered to and provided.

Prosperity Creek

Prosperity Creek is a 168-unit apartment complex built to serve Seniors. The property includes 12 LITHC Units and 156 RAD-PBV units. INLIVIAN acquired the investor member's interest in 2024. INLIVIAN plans to recapitalize the deal once the original RAD contract expires in 2028.

720 Morehead

In 2020, INLIVIAN was approached by Atrium Health with an opportunity to swap this parcel of land with another parcel also in a high-opportunity area. In Q2 of 2026, the land swap was finalized. HDP will use MTW funds to develop new residential opportunities on this parcel, as well as a second site that HDP will receive as part of the swap.

Savanna Woods

Savanna Woods is a 49-unit property located in a high-opportunity neighborhood of Charlotte. All 49 units under a RAD PBV Contract. The HDP team will begin a multi-year renovation project on the property in 2025, utilizing MTW funding and property reserves. Temporary relocation of residents will be required while renovations are underway. A third-party relocation consultant will be engaged as part of this project to support residents and ensure all Unified Relocation Act ("URA") requirements and benefits are adhered to and provided.

Montgomery Gardens

Montgomery Gardens is a 100-unit affordable housing community located in Charlotte that serves low-income households and provides a critical source of affordable housing. The property has experienced significant deferred maintenance and aging building systems that require substantial reinvestment to ensure long-term viability. HDP intends to preserve this community through a comprehensive recapitalization and rehabilitation effort utilizing Low-Income Housing Tax Credits (LIHTC) and MTW program funds. Planned improvements include major building system replacements, exterior repairs, energy-efficiency upgrades, and interior unit renovations. Through this investment, HDP will preserve long-term affordability, improve operational sustainability, and maintain an important housing resource for Charlotte families.

Meadow Oaks

Meadow Oaks is an affordable multifamily community included in HDP's active acquisition and preservation pipeline. The property has been identified as a strong candidate for a LIHTC-financed rehabilitation strategy that will allow HDP to preserve affordability while addressing physical and capital needs throughout the community. Planned renovations will include building system upgrades, exterior improvements, energy-efficiency enhancements, and comprehensive unit modernization. HDP's preservation strategy is intended to protect existing affordable housing inventory in a rapidly changing market while ensuring residents benefit from improved housing quality, safety, and long-term property stability. MTW resources may be utilized to support predevelopment activities and financing efforts as the transaction advances.

Arbor Glen

Arbor Glen is an affordable multifamily community targeted for preservation through HDP's ongoing acquisition and rehabilitation initiatives. HDP is advancing a recapitalization strategy utilizing Low-Income Housing Tax Credits to fund substantial property improvements while maintaining affordability for current and future residents. Rehabilitation activities are anticipated to include building envelope repairs, roof and exterior improvements, mechanical system upgrades, accessibility enhancements, and comprehensive interior renovations. The planned investment, including the use of MTW funds, will modernize the community, improve operating efficiency, and position the property for long-term affordability and sustainability. HDP views Arbor Glen as an important preservation opportunity that will help maintain quality affordable housing options in Charlotte's increasingly competitive housing market.

Wallace Woods

Wallace Woods is an affordable housing community included in HDP's active redevelopment and preservation pipeline. HDP is currently evaluating a range of redevelopment and rehabilitation scenarios to determine the highest and best long-term use of the site while preserving affordability and maximizing community impact. The ultimate development approach will be informed by site conditions, market analysis, resident needs, and available financing resources. In the near term, MTW funds will support predevelopment activities, including due diligence, planning, design, entitlement work, and financial structuring. HDP's objective is to position Wallace Woods for future investment that enhances housing quality, strengthens neighborhood stability, and expands long-term affordable housing opportunities within the community. Temporary relocation of residents will be required while renovations are underway. A third-party relocation consultant will be engaged as part of this project to support residents and ensure all Unified Relocation Act (“URA”) requirements and benefits are adhered to and provided.

Claremont

Claremont is an affordable housing community identified as a key preservation asset within HDP's multi-year development and recapitalization pipeline. The property requires strategic reinvestment to address aging infrastructure, deferred maintenance, and modernization needs while preserving long-term affordability for residents. HDP intends to advance a comprehensive rehabilitation through a combination of Low-Income Housing Tax Credits and MTW program funds. Planned improvements are expected to include major building system replacements, exterior and common area upgrades, accessibility improvements, and interior unit renovations. The recapitalization will improve property performance, enhance resident living conditions, and ensure the community remains a stable and sustainable affordable housing resource for Charlotte residents for decades to come. Temporary relocation of residents will be required while renovations are underway. A third-party relocation consultant will be engaged as part of this project to support residents and ensure all Unified Relocation Act ("URA") requirements and benefits are adhered to and provided.

PLANNED ACQUISITION ACTIVITIES

Strategy

INLIVIAN/HDP may consider an acquisition strategy based on expiring tax credits or other methods that will benefit the people routinely served by our agencies.

Private/Public/Partnerships (P3)

The goal of the P3 Program is to partner with third-party developers in an effort to increase the number of affordable housing units in and around the City of Charlotte. INLIVIAN also seeks to use these new communities to mainstream the agency's RAD vouchers to redevelop obsolete sites, thereby increasing the density, further adding units to the city, and providing greater housing choices to our clients. These sites are all located in high-opportunity or opportunity areas by definition and are close to job opportunities and mass transit for our residents. It also gives INLIVIAN residents a chance to move into a community not historically known as being federally subsidized. By utilizing all potentially available resources at INLIVIAN's disposal, the P3 Program allows INLIVIAN to further its affordable housing mission. Further, HDP is the managing member or general partner in each of the ownership entities with the right of first refusal to purchase the property and the interests of all members at the end of the initial compliance period. This means an increase in our current portfolio of 1,129 units, or a 44% increase from our 2019-2023 efforts alone. All P3 projects are in various stages of construction, with completion and lease-up anticipated before 2026. These P3 projects may necessitate the usage of MTW funding flexibility.

Recently closed and leased properties include:

- Archdale Flats – Family (202)
- Archdale Flats – Seniors (131)
- Abbington on Mt. Holly (102)
- Freedom Flats (220)
- Flats at 2109 (fka Ashley Flats) (150)
- Evoke Living at Westerly Hills (156)
- Evoke Living at Arrowood (168)

Current opportunities that have closed and are under construction or that are targeted for closing include: Evoke Living at Ballantyne (60), The Vue at Honeywood (108), and Alleghany Crossing (220). HDP/INLIVAIN has committed PBV's to the Baxter Street redevelopment by Atrium Health, which is part of the Atrium Land Swap currently being explored.

Opportunity Development

INLIVIAN/HDP may explore purchasing other Class B or C apartment complexes in a High or Very High Opportunity Census tract to continue agency efforts to deconcentrate poverty. MTW funds may be used in these efforts.

INLIVIAN
HOUSING REDEFINED

Appendix F: RAD Significant Amendment

Rental Assistance Demonstration (RAD) Significant Amendment

The Housing Authority of the City of Charlotte is amending its FY2016 Moving Forward Annual Plan because it was a successful applicant in the Rental Assistance Demonstration (hereafter referred to as "RAD" or "Demonstration"). As a result, the Housing Authority of the City of Charlotte will be converting to Project Based Vouchers under the guidelines of PIH Notice 2012-32, REV-2 and any successor Notices. Upon conversion to Project Based Vouchers the Authority will adopt the PBV Residents Rights and Participation that cannot be altered by MTW flexibility. These are listed in Section 1.6.C &
1.6.D of PIH Notice 2012-32, REV-2. The PBV Resident Rights and Participation applicable to INLIVIAN's RAD conversion are appended to this Attachment. Additionally, the Housing Authority of the City of Charlotte is currently compliant with all fair housing and civil rights requirements and is not under a Voluntary Compliance Agreement.

RAD was designed by HUD to assist in addressing the capital needs of public housing by providing the Housing Authority of the City of Charlotte with access to private sources of capital to repair and preserve its affordable housing assets. Please be aware that upon conversion, the Authority's Capital Fund Budget will be reduced by the pro rata share of Public Housing Developments converted as part of the Demonstration, and that Housing Authority of the City of Charlotte may also borrow funds to address their capital needs. At this time, INLIVIAN will be researching all options and maintaining continued service requirements will be a high priority for the agency. We do not anticipate any reductions due to RAD.

The Housing Authority of the City of Charlotte will also be contributing Operating Reserves up to the maximum available amount per property as defined per the RAD notice, subject to HUD and Board approval. The Housing Authority of the City of Charlotte currently has debt under the Capital Fund Financing Program and will be working with US Bank to address outstanding debt issues. Regardless of any funding changes that may occur as a result of conversion under RAD, the Housing Authority of the City of Charlotte certifies that it will maintain its continued service level for its remaining portfolio of public housing units

Below, please find specific information related to the Public Housing Development(s) selected for RAD:

Name of Public Housing Development: Southside	PIC Development ID: NC003000003	Conversion type: PBV	Transfer of Assistance: 2 units
Total Units: 394	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $529,754
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	65	73	8
Two Bedroom	233	221	-12
Three Bedroom	86	88	2
Four Bedroom	10	10	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	394	392	-2 (special use units)
If performing a Transfer of Assistance:	The Transfer of Assistance is related to special use units, therefore no transfer of waiting list is necessary		
# of Elderly, Disabled, or Receiving Supportive Services[1]:	392		

Name of Public Housing Development: First Ward	PIC Development ID: NC003000005	Conversion type: PBV	Transfer of Assistance: None
Total Units: 132	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $191,069
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	8	8	0
Two Bedroom	68	68	0
Three Bedroom	43	43	0
Four Bedroom	12	12	0
Five Bedroom	1	1	0
Six Bedroom	0	0	0
Total Units	132	132	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	132		

[1] INLIVIAN meets the RAD notice to Project-Base 100% of the units because the number of families that are elderly, disabled or eligible to receive supportive services exceeds 50% of the total RAD PBV units.

Name of Public Housing Development: Edwin Towers	PIC Development ID: NC003000006	Conversion type: PBV	Transfer of Assistance: None
Total Units: 176	Pre-RAD Unit Type: Senior	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $205,351
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	64	64	0
One Bedroom	96	96	0
Two Bedroom	16	16	0
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	176	176	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	176		

Name of Public Housing Development: Arbor Glen	PIC Development ID: NC003000009	Conversion type: PBV	Transfer of Assistance: 4 units
Total Units: 29	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $42,491
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	4	4	0
Two Bedroom	10	6	-4
Three Bedroom	13	13	0
Four Bedroom	2	2	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	29	25	-4
If performing a Transfer of Assistance:	The Transfer of Assistance is related to special use units, therefore no transfer of waiting list is necessary		
# of Elderly, Disabled, or Receiving Supportive Services:	25		

Name of Public Housing Development: Arbor Glen I	PIC Development ID: NC003000010	Conversion type: PBV	Transfer of Assistance: None
Total Units: 60	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $78,789
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	42	42	0
Two Bedroom	12	12	0
Three Bedroom	6	6	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	60	60	0
If performing a Transfer of Assistance:			
# of Elderly, Disabled, or Receiving Supportive Services:	60		

Name of Public Housing Development: Dillehay Courts, I	PIC Development ID: NC003000012	Conversion type: PBV	Transfer of Assistance: Yes
Total Units: 36	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $219,186
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	2	2
Two Bedroom	2	17	15
Three Bedroom	14	17	3
Four Bedroom	16	0	16
Five Bedroom	4	0	4
Six Bedroom	0	0	0
Total Units	36	36	0
If performing a Transfer of Assistance:	**Subsidy will be transferred to a new development in Charlotte that INLIVIAN's development instrumentality, Horizon Development Partners, Inc. is developing with a private partner. HDP is the controlling member in the partnership and has the right of first refusal to purchase the property and all member interests after the initial 15-year compliance period for tax credits has expired.** The remaining 100 units will be demolished pursuant to a Section 18 conversion.		
# of Elderly, Disabled, or Receiving Supportive Services:	0		

Name of Public Housing Development: Dillehay Courts, II	PIC Development ID: NC003000012	Conversion type: Section 18 - TPV	Transfer of Assistance: None
Total Units: 100	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $219,186
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	0	0
Two Bedroom	10	0	10
Three Bedroom	54	0	54
Four Bedroom	32	0	32
Five Bedroom	4	0	4
Six Bedroom	0	0	0
Total Units	136	136	100
If performing a Transfer of Assistance:	**The 100 units will be disposed of under a Section 18 application with a demolition action. We will then be applying for Tenant Protection Vouchers.**		
# of Elderly, Disabled, or Receiving Supportive Services:	0		

Name of Public Housing Development: Cedar Knoll/Leafcrest/ Mallard Ridge	PIC Development ID: NC003000016	Conversion type: PBV	Transfer of Assistance: None
Total Units: 132	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $198,729
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	15	15	0
Two Bedroom	42	42	0
Three Bedroom	61	61	0
Four Bedroom	14	14	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	132	132	0
If performing a Transfer of Assistance:	**N/A**		

# of Elderly, Disabled, or Receiving Supportive Services:	97

Name of Public Housing Development: Charlottetown	PIC Development ID: NC003000018	Conversion type: PBV	Transfer of Assistance: 19 units
Total Units: 180	Pre-RAD Unit Type: Disabled	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $204,394
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	139	125	-14
One Bedroom	40	36	-4
Two Bedroom	1	0	-1
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	180	161	-19
If performing a Transfer of Assistance:	The Transfer of Assistance is related to special use units, therefore no transfer of waiting list is necessary		
# of Elderly, Disabled, or Receiving Supportive Services:	161		

Name of Public Housing Development: Tall Oaks/Tarlton Hills/Savanna Woods	PIC Development ID: NC003000020	Conversion type: PBV	Transfer of Assistance: None
Total Units: 149	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $225,454
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	25	25	0
Two Bedroom	52	52	0
Three Bedroom	50	50	0
Four Bedroom	22	22	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	149	149	0
If performing a Transfer of Assistance:	**See Note E Below**		
# of Elderly, Disabled, or Receiving Supportive Services:	50		

Name of PublicHousing Development: Autumn Place	PIC Development ID: NC003000022	Conversion type: PBV	Transfer of Assistance: None
Total Units: 68	Pre-RAD Unit Type: Elderly	Post-RAD Unit Type if different:	Capital Fund allocation of Development:$ 82,776
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	65	65	0
Two Bedroom	3	3	0
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	68	68	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	68		

Name of Public Housing Development: Meadow Oaks/Gladedale/ Wallace Woods	PIC Development ID: NC003000025	Conversion type: PBV	Transfer of Assistance: None
Total Units: 129	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $196,460
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	11	11	0
Two Bedroom	42	42	0
Three Bedroom	68	68	0
Four Bedroom	8	8	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	129	129	0
If performing a Transfer of Assistance:	**See Note E Below**		
# of Elderly, Disabled, or Receiving Supportive Services:	0		

Name of Public Housing Development: Sunridge/Robinsdale	PIC Development ID: NC003000028	Conversion type: PBV	Transfer of Assistance: None
Total Units: 74	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $112,283
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	4	4	0
Two Bedroom	23	23	0
Three Bedroom	43	43	0
Four Bedroom	4	4	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	74	74	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	0		

Name of Public Housing Development: Park @ Oaklawn	PIC Development ID: NC003000030	Conversion type: PBV	Transfer of Assistance: None
Total Units: 89	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $84,539
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	0	0
Two Bedroom	46	46	0
Three Bedroom	39	39	0
Four Bedroom	4	4	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	89	89	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	89		

Name of Public Housing Development: Rivermere	PIC Development ID: NC003000031	Conversion type: PBV	Transfer of Assistance: None
Total Units: 20	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $18,832
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	0	0
Two Bedroom	12	12	0
Three Bedroom	8	8	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	20	20	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	0		

Name of Public Housing Development: Arbor Glen II	PIC Development ID: NC003000032	Conversion type: PBV	Transfer of Assistance: None
Total Units: 40	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $37,087
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why: (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	0	0
Two Bedroom	27	27	0
Three Bedroom	13	13	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	40	40	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	40		

Name of Public Housing Development: Nia Point	PIC Development ID: NC003000033	Conversion type: PBV	Transfer of Assistance: None
Total Units: 29	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $26,874
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	0	0
Two Bedroom	16	16	0
Three Bedroom	13	13	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	29	29	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	29		

Name of Public Housing Development: Arbor Glen III	PIC Development ID: NC003000035	Conversion type: PBV	Transfer of Assistance: None
Total Units: 12	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $11,216
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	0	0
Two Bedroom	8	8	0
Three Bedroom	4	4	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	12	12	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	12		

Name of Public Housing Development: McAden Park	PIC Development ID: NC003000037	Conversion type: PBV	Transfer of Assistance: None
Total Units: 30	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $26,387
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	3	3	0
Two Bedroom	18	18	0
Three Bedroom	9	9	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	30	30	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	30		

Name of Public Housing Development: Stonehaven	PIC Development ID: NC003000038	Conversion type: PBV	Transfer of Assistance: None
Total Units: 24	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $20,721
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	6	6	0
Two Bedroom	16	16	0
Three Bedroom	2	2	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	24	24	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	24		

Name of Public Housing Development: Montgomery Gardens	PIC Development ID: NC003000039	Conversion type: PBV	Transfer of Assistance: None
Total Units: 20	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $18,510
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	0	0
Two Bedroom	14	14	0
Three Bedroom	6	6	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	20	20	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	20		

Name of Public Housing Development: Prosperity Creek	PIC Development ID: NC003000040	Conversion type: PBV	Transfer of Assistance: 84 units
Total Units: 72	Pre-RAD Unit Type: Elderly	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $51,227
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	72	144	72
Two Bedroom	0	12	12
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	72	156	84
If performing a Transfer of Assistance:	**This will allow the property to be governed by a single program / HAP Contract. No changes to the policy expected.**		
# of Elderly, Disabled, or Receiving Supportive Services:	156		

Name of Public Housing Development: South Oak Crossing	PIC Development ID: NC003000041	Conversion type: PBV	Transfer of Assistance: None
Total Units: 20	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $19,329
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	0	0
Two Bedroom	10	10	0
Three Bedroom	10	10	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	20	20	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	20		

Name of Public Housing Development: Springfield Gardens	PIC Development ID: NC003000042	Conversion type: PBV	Transfer of Assistance: None
Total Units: 22	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $20,901
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	0	0
Two Bedroom	11	11	0
Three Bedroom	11	11	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	22	22	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	22		

Name of Public Housing Development: 940 Brevard	PIC Development ID: NC003000044	Conversion type: PBV	Transfer of Assistance: None
Total Units: 40	Pre-RAD Unit Type: Elderly	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $28,619
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	40	40	0
Two Bedroom	0	0	0
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	40	40	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	40		

Name of Public Housing Development: Seigle Point	PIC Development ID: NC003000045	Conversion type: PBV	Transfer of Assistance: None
Total Units: 102	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $94,569
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	6	6	0
Two Bedroom	42	42	0
Three Bedroom	54	54	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	102	102	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	102		

Name of Public Housing Development: Springcroft @ Ashley Park	PIC Development ID: NC003000046	Conversion type: PBV	Transfer of Assistance: None
Total Units: 18	Pre-RAD Unit Type: Elderly	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $12,891
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	18	18	0
Two Bedroom	0	0	0
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	18	18	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	18		

Name of Public Housing Development: McAlpine	PIC Development ID: NC003000048	Conversion type: PBV	Transfer of Assistance: None
Total Units: 26	Pre-RAD Unit Type: Senior	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $18,602
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	26	26	0
Two Bedroom	0	0	0
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	26	26	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	26		

Name of Public Housing Development: Glen Cove	PIC Development ID: NC003000049	Conversion type: PBV	Transfer of Assistance: None
Total Units: 10	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $9,574
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	0	0
Two Bedroom	5	5	0
Three Bedroom	5	5	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	10	10	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	10		

Name of Public Housing Development: Fairmarket Square	PIC Development ID: NC003000050	Conversion type: PBV	Transfer of Assistance: None
Total Units: 16	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different	Capital Fund allocation of Development: $15,508
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	0	0
Two Bedroom	8	8	0
Three Bedroom	8	8	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	16	16	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	16		

Name of Public Housing Development: McCreesh II	PIC Development ID: NC003000051	Conversion type: PBV	Transfer of Assistance: None
Total Units: 63	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development:$ 36,655
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	63	63	0
One Bedroom	0	0	0
Two Bedroom	0	0	0
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	63	63	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	63		

Name of Public Housing Development: Seneca Woods	PIC Development ID: NC003000052	Conversion type: PBV	Transfer of Assistance: None
Total Units: 17	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $16,267
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	0	0
Two Bedroom	8	8	0
Three Bedroom	9	9	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	17	17	0
If performing a Transfer of Assistance:	**See Note E Below**		
# of Elderly, Disabled, or Receiving Supportive Services:	17		

Name of Public Housing Development: Ashley Park	PIC Development ID: NC003000053	Conversion type: PBV	Transfer of Assistance: None
Total Units: 22	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $18,954
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	0	0
Two Bedroom	22	22	0
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	22	22	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	22		

Name of Public Housing Development: Hampton Creste	PIC Development ID: NC003000054	Conversion type: PBV	Transfer of Assistance: None
Total Units: 60	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $54,287
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	8	8	0
Two Bedroom	44	44	0
Three Bedroom	8	8	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	60	60	0
If performing a Transfer of Assistance:	**See Note E Below**		
# of Elderly, Disabled, or Receiving Supportive Services:	60		

Name of Public Housing Development: Moore Place	PIC Development ID: NC003000055	Conversion type: PBV	Transfer of Assistance: None
Total Units: 34	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $24,712
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	34	34	0
Two Bedroom	0	0	0
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	34	34	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	34		

Name of Public Housing Development: Steele Creek	PIC Development ID: NC003000056	Conversion type: PBV	Transfer of Assistance: 60 units
Total Units: 60	Pre-RAD Unit Type: Senior	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $38,721
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	60	102	42
Two Bedroom	0	18	18
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	60	120	60
If performing a Transfer of Assistance:	**This will allow the property to be governed by a single program / HAP Contract. No changes to the policy expected.**		
# of Elderly, Disabled, or Receiving Supportive Services:	120		

Name of Public Housing Development: Woodlawn House	PIC Development ID: NC003000057	Conversion type: PBV	Transfer of Assistance: 52 units
Total Units: 52	Pre-RAD Unit Type: Elderly	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $695.29
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	34	68	34
Two Bedroom	18	36	18
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	52	104	52
If performing a Transfer of Assistance:	**This will allow the property to be governed by a single program / HAP Contract. No changes to the policy expected.**		
# of Elderly, Disabled, or Receiving Supportive Services:	104		

Name of Public Housing Development: McMullen Woods	PIC Development ID: NC003000059	Conversion type: PBV	Transfer of Assistance: None
Total Units: 21	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $19,816
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	0	0	0
Two Bedroom	11	11	0
Three Bedroom	10	10	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	21	21	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	21		

Name of Public Housing Development: Boulevard Seniors	PIC Development ID: NC003000060	Conversion type: PBV	Transfer of Assistance: 20 units
Total Units: 70	Pre-RAD Unit Type: Elderly	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $45,672
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	70	90	20
Two Bedroom	0	0	0
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	70	90	20
If performing a Transfer of Assistance:	The Transfer of Assistance is related to special use units, therefore no transfer of waiting list is necessary.		
# of Elderly, Disabled, or Receiving Supportive Services:	90		

Name of Public Housing Development: Hall House	PIC Development ID: NC003000061	Conversion type: PBV	Transfer of Assistance: 191
Total Units: 191	Pre-RAD Unit Type: Senior	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $233,435
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	60	0	-60
One Bedroom	130	0	-130
Two Bedroom	1	0	-1
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	191	0	-191
If performing a Transfer of Assistance:	Hall House is currently vacant, so there is no waiting list		
# of Elderly, Disabled, or Receiving Supportive Services:	0		

Name of Public Housing Development: Claremont/Victoria Square	PIC Development ID: NC003000062	Conversion type: PBV	Transfer of Assistance: 1 unit from Victoria Square
Total Units: 82	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $72,191
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	14	14	0
Two Bedroom	34	34	0
Three Bedroom	25	24	-1
Four Bedroom	9	9	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	82	81	-1
If performing a Transfer of Assistance:	The Transfer of Assistance is related to special use units, therefore no transfer of waiting list is necessary		
# of Elderly, Disabled, or Receiving Supportive Services:	81		

Name of Public Housing Development: Boulevard Phase II	PIC Development ID: NC003000063	Conversion type: PBV	Transfer of Assistance: 8 units
Total Units: 23	Pre-RAD Unit Type: Family	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $21,320
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	0	0	0
One Bedroom	4	7	3
Two Bedroom	11	15	4
Three Bedroom	8	9	1
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	23	31	8
If performing a Transfer of Assistance:	The Transfer of Assistance is related to special use units, therefore no transfer of waiting list is necessary		
# of Elderly, Disabled, or Receiving Supportive Services:	31		

Name of Public Housing Development: Strawn Apartments II	PIC Development ID: NC003000064	Conversion type: PBV	Transfer of Assistance: None
Total Units: 170	Pre-RAD Unit Type: Senior	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $178,054
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	120	120	0
One Bedroom	50	50	0
Two Bedroom	0	0	0
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	170	170	170
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	170		

Name of Public Housing Development: Parktowne Terrace II	PIC Development ID: NC003000065	Conversion type: PBV	Transfer of Assistance: None
Total Units: 163	Pre-RAD Unit Type: Senior	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $172,099
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency	130	130	0
One Bedroom	33	33	0
Two Bedroom	0	0	0
Three Bedroom	0	0	0
Four Bedroom	0	0	0
Five Bedroom	0	0	0
Six Bedroom	0	0	0
Total Units	163	163	0
If performing a Transfer of Assistance:	**N/A**		
# of Elderly, Disabled, or Receiving Supportive Services:	163		

Name of Public Housing Development: Strawn Cottages	PIC Development ID: NC003000058	Conversion type: PBV	Transfer of Assistance: None
Total Units: ___11	Pre-RAD Unit Type: ____Family_	Post-RAD Unit Type if different:	Capital Fund allocation of Development: $172,099
Bedroom Type	**Number of Units Pre-Conversion**	**Number of Units Post-Conversion**	**Change in Number of Units per Bedroom Type and Why (De Minimis Reduction, Transfer of Assistance, Unit Reconfigurations, Etc.)**
Studio/Efficiency			
One Bedroom	11	11	0
Two Bedroom			
Three Bedroom			
Four Bedroom			
Five Bedroom			
Six Bedroom			
Total Units	11	11	0
If performing a Transfer of Assistance:	**Subsidy will be transferred to a new development in Charlotte that INLIVIAN's development instrumentality, Horizon Development Partners, Inc. is developing with a private partner. HDP is the controlling member in the partnership and has the right of first refusal to purchase the property and all member interests after the initial 15-year compliance period for tax credits has expired.**		
# of Elderly, Disabled, or Receiving Supportive Services:			

Total to convert under RAD: 3,399 Physical Units/3,277 Occupied Units

A. INLIVIAN proposes a transfer of assistance for units at Hall House to Woodlawn, Prosperity Creek and Steele Creek.
B. INLIVIAN proposes a transfer of assistance for current special use units at Southside Homes, Arbor Glen, Charlottetown Terrace, and Victoria Square to dwelling units at Boulevard Seniors and Boulevard Phase II.
C. Upon conversion there will be changes in the policies that govern eligibility, admission, selection, and occupancy of units at the project sites after they have been converted. INLIVIAN will follow the HCV Administrative Plan and approved Owner Tenant Selection plan for resident selection.
D. INLIVIAN is currently compliant with all fair housing and civil rights requirements and is not under a Voluntary Compliance Agreement.
E. INLIVIAN will be requesting approval from HUD for a Transfer of Assistance of RAD PBV at formerly converted public housing properties, in order to redevelop underutilized sites to increase the total number of units to develop the site as mixed-income housing versus the traditional 100% extremely low income. Additional housing is needed in the portfolio to meet community demand in one of the fastest growing cities in the nation.
F. INLIVIAN has completed a transfer of assistance of 36 RAD units from Dillehay Courts Phase I to a new development known as Archdale Flats – Family.

RAD PBV PROJECT SELECTION AND PROJECT CAP

PBV Project Selection

Maximum Amount of PBV Assistance
Covered projects do not count against the maximum amount of assistance a PHA may utilize for the PBV program.

Cap on Number of PBV Units in each Project

Fifty percent (50%) of the units in each project may receive PBV assistance. An assisted household cannot be involuntarily displaced as a result of this provision.

INLIVIAN will provide Housing Choice Voucher Project-based assistance for up to 100% of units at properties owned directly or indirectly by the Agency, subject to HUD's requirements regarding subsidy layering.

An owner may still project-base 100 percent of the units provided at least 50 percent of theunits at the project qualify for the exceptions for elderly, disabled, or families receiving supportive services, or are within single-family properties or in accordance with INLIVIAN MTW initiatives.

Families living in units subject to a proposed RAD conversion must be given the option to receive supportive services. If such services are declined by the household, the unit shall remain under the HAP contract, the household shall not be terminated from the PBV program, and the decision to decline an offer to receive supportive services shall not represent a ground for lease termination. Once the initial household residing in the excepted unit under RAD vacates such unit, all MTW / PBV program requirements related to the required receipt of supportive services shall apply

PBV CONTRACT TERMS AND CONTRACT RENTS

Length of Contract

Covered projects shall have an initial HAP term of at least 15 years and up to 20 years upon request of the PHA and with approval by the agency administering the vouchers.

Mandatory Contract Renewal

By statute, upon contact expiration, the agency administering the vouchers shall offer, and the PHA shall accept, renewal of the contract subject to the terms and conditions applicable at the time of renewal and the availability of appropriations each year for such renewal.

In the event that the HAP Contract is removed due to breach, non-compliance or insufficiency of Appropriations, for all units previously covered under the HAP Contract, new tenants must have incomes at or below 80 percent of the area median income at the time of admission and rents may not exceed 30% of 80% of median income for an appropriate size unit for the remainder of the term of the RAD Use Agreement.

Initial Contract Rents

Initial PBV contract rents are subject to the statutory and regulatory PBV requirements governing contract rents. Initial contract rents cannot exceed the lower of (a) the reasonable rent; (b) an amount determined by the PHA, not to exceed 120 percent of the applicable FMR (or

applicable exception payment standard), minus any utility allowance; or (c) the rent requested by the owner.

PHAs may adjust subsidy (and contract rents) across multiple projects. MTW agencies may use their MTW block grant funds to set their initial contract rents, subject to applicable program caps. HUD refers to this as "bundled" rents, and is permissible when a PHA submits applications for two or more projects. There is no limit to the number of projects that a PHAmay bundle.

Adjusting Contract Rents

Contract rents will be adjusted annually by HUD's Operating Cost Adjustment Factor ("OCAF) at each anniversary of the HAP Contract, subject to the availability of appropriations for each year of the contract term. The rent to owner may at no time exceed the reasonable rent charged for comparable unassisted units in private market, as determined by the Contract Administrator. However, the rent to owner shall not be reduced below the initial rent to owner for dwelling units under the initial HAP Contract. MTW agencies may not alter this requirement.

Resident Rights, Participation, Waiting List and Grievance Procedures

Section 1.6. C. PBV Resident Rights and Participation

1. **No Re-screening of Tenant upon Conversion**
   Current households are not subject to rescreening, income eligibility, or income targeting provisions. Current households will be subject to any ongoing eligibility requirements for actions that occur during tenancy.

2. **Right to Return**
   Any residents which need to be temporarily relocated to facilitate rehabilitation or construction will have a right to return to an assisted unit at the development once rehabilitation or construction is completed. Where the transfer of assistance to a new site is warranted and approved residents of the converting development will have the right to reside in an assisted unit at the new site once rehabilitation or construction is complete. Households will need to meet eligibility requirements at the time of admission. Residents of a development undergoing conversion of assistance may voluntarily accept a HA or Owner's offer to permanently relocate to another assisted unit, and thereby waive their right to return to the development after rehabilitation or construction is completed

3. **Renewal of Lease**

   The HA must renew all leases upon lease expiration, unless cause exists. This provision must be incorporated by the PBV owner into the tenant lease or tenancy addendum, as appropriate.

4. **Phase-in of Tenant Rent Increases**

   INLIVIAN will continue to utilize the Rent Reform initiative to calculate total tenant payment, so tenant rent increases are not anticipated. If a tenant's monthly rent increases by more than the greater of 10 percent or $25 purely as a result of conversion, the rent increase will be phased in over 3 years.

   Three Year Phase-in:

   - Year 1: Any recertification (interim or annual) performed prior to the second annual recertification after conversion – 33% of difference between most recently paid TTP and the standard TTP
   - Year 2: Year 2 Annual Recertification (AR) and any Interim Recertification (IR) prior to Year 3 AR – 66% of difference between most recently paid TTP and the standard TTP
   - Year 3: Year 3 AR and all subsequent recertifications – Full standard TTP

5. **Public Housing FSS, ROSS, and Jobs Plus Participants**

   Current PH FSS participants will continue to be eligible for FSS once their housing is converted under RAD, and PHAs will be allowed to use any PH FSS funds granted previously or pursuant to the FY 2013 PH FSS NOFA, to serve those FSS participants who live in units converted by RAD and who will as a result be moving to the HCV FSS program. A PHA must convert the PH FSS program participants at the covered project to their HCV FSS program.

   Residents who were converted from the PH FSS program to the HCV FSS program through RAD may be terminated from the HCV FSS program or have HCV assistance withheld due to the participant's failure to comply with the contract of participation. RAD-PBV participants who exit from the HCV Traditional FSS program and occupied a RAD-PBV unit at the time of conversion may be required to terminate their assistance upon exiting the program.

   Current ROSS-SC grantees will be able to finish out their current ROSS-SC grants once their housing is converted under RAD. However, once the property is converted, it will no longer be eligible to be counted towards the unit count for future public housing ROSS-SC grants.

   The Jobs Plus target project(s) under RAD will be able to finish out their Jobs Plus period of performance at the site. Existing grant requirements, including but not limited to Jobs Plus Earned Income Disregard will continue to be implemented.

6. Resident Participation and Funding

Residents of covered projects converting assistance to PBVs will have the right to establish and operate a resident organization for the purpose of addressing issues related to their living environment and be eligible for resident participation funding contingent upon funding availability.

7. Resident's Procedural Rights

A. **Lease Termination.** In addition to the regulations at 24 CFR § 983.257, related to owner termination of tenancy and eviction, the termination procedure for RAD conversions to PBV will require that HAs provide adequate written notice of termination of the lease. In a case where the family has committed such an action or failure to act, the Project Owner may seek to evict the family and will do so by terminating the family's lease according to the following procedures.

B. **Notice of lease termination.** Before terminating a tenant's lease, the Project Owner must issue a written notice of lease termination to the tenant which shall not be less than:

i. A reasonable period of time, but not to exceed than thirty (30) days:
   a. If the health or safety of other tenants, Project Owner or HA employees, or persons residing in the immediate vicinity of the premises is threatened; or
   b. In the event of any drug-related or violent criminal activity or felony conviction;

ii. Ten (10) days in the case of nonpayment of rent;

iii. Thirty (30) days in every other case, except that if a state or local law provides for a shorter period of time, such shorter period shall apply;

iv. Any notice of lease termination must contain the following information.
   a. The reasons for the lease termination with enough specificity to permit the tenant to prepare a defense;
   b. A statement of the tenant's right to request an informal grievance hearing from the Project Owner within ten (10) business days of the tenant's receipt of the notice of lease termination;
   c. The opportunity to examine before the informal grievance hearing any relevant documents, records, or regulations, in the Project Owner's possession, including the tenant file, directly relating to the matter. The tenant shall be allowed to copy any such document at the tenant's expense. If the Project Owner does not make the document available for examination upon request by the resident, the Project Owner may not rely on such document at the informal grievance hearing.
   d. The rights of tenants pursuant to the requirements of 24 CFR Part 5, Subpart L, involving protections for victims of domestic violence, dating violence, sexual assault, or stalking; and
   e. The right of tenants to request a reasonable accommodation based on a disability, in accordance with 24 CFR Part 8.

C. **Grievance Hearing.** In addition to reasons that require an opportunity for an informal hearing given in 24 CFR § 982.555(a)(1)(i)-(vi),31 an opportunity for an informal hearing must be given to residents for any dispute that a resident may have with respect to a HA (as owner) action in accordance with the individual's lease or the contract administrator in accordance with RAD PBV requirements that adversely affect the resident's rights, obligations, welfare, or status.

i. For any hearing required under 24 CFR § 982.555(a)(1)(i)-(vi), the contract administrator will perform the hearing, as is outlined in Chapter 16 of the Housing Choice Voucher Administrative Plan.
ii. For any additional hearings required under RAD, the HA (as owner) will perform the hearing.
iii. There is no right to an informal hearing for class grievances or to disputes between residents not involving the Project Owner or contract administrator.
iv. The Project Owner gives residents notice of their ability to request an informal hearing as outlined in 24 CFR § 982.555 (c) (1) for informal hearings that will address circumstances that fall outside of the scope of 24 CFR § 982.555 (a) (1) (i)-(vi).

D. **Informal Hearing.** The Project Owner provides opportunity for an informal hearing before an eviction as described below:

a. Request for informal grievance hearing. The tenant shall submit a written request for a hearing to the Project Owner within ten (10) business days of receipt of notice of the adverse action taken by the Project Owner. The written request shall specify:
   i. The reasons for the grievance; and
   ii. The action or relief sought.

b. Selection of Hearing Officer or Hearing Panel.
   i. An informal grievance hearing shall be conducted by an impartial person or persons appointed by the Project Owner other than a person who made or approved the action under review or a subordinate of such person.

c. Scheduling of hearings. Once the tenant properly requests the hearing, the hearing shall be scheduled by the hearing officer or hearing panel promptly for a time and place reasonably convenient to both the tenant and the Project Owner. A written notification specifying the time, place and the procedures governing the informal hearing shall be issued to the tenant at least five (5) calendar days before the informal hearing.

d. Hearing Requirements
   i. The tenant shall be afforded a fair hearing, which shall include:
      a) The opportunity to examine before the informal grievance hearing any relevant documents, records, or regulations, in the Project Owner's possession, including the tenant file, directly relating to the matter. The tenant shall be allowed to copy any such document at the tenant's expense. If the Project Owner does not make the document available for examination upon request by the resident, the Project Owner may not rely on such document at the informal grievance hearing.
      b) The right to be represented by counsel or other person chosen as the tenant's representative, and to have such person make statements on the tenant's behalf;

c) The right to a private hearing;

d) The right to present evidence and arguments in support of the tenant's complaint, to controvert evidence relied on by the Project Owner, and to confront and cross-examine all witnesses upon whose testimony or information the Project Owner relies; and

e) A decision based solely and exclusively upon the facts presented at the hearing.

ii. The hearing officer or hearing panel may render a decision without proceeding with the hearing if the hearing officer or hearing panel determines that the issue has been previously decided in another proceeding.

iii. If the tenant fails to appear at a scheduled hearing, the hearing officer or hearing panel may make a determination that the party has waived his right to a hearing. Both the tenant and the Project Owner shall be notified of the determination by the hearing officer or hearing panel: Provided, That a determination that the tenant has waived his right to a grievance hearing shall not constitute a waiver of any right the tenant may have to contest the disposition of the grievance in an appropriate judicial proceeding.

iv. At the hearing, the tenant must first make a showing of an entitlement to the relief sought and thereafter the Project Owner must sustain the burden of justifying the Project Owner's action or failure to act against which the complaint is directed.

v. The hearing shall be conducted informally by the hearing officer or hearing panel and oral or documentary evidence pertinent to the facts and issues raised by the complaint may be received without regard to admissibility under the rules of evidence applicable to judicial proceedings. The hearing officer or hearing panel shall require the Project Owner, the tenant, counsel and other participants to conduct themselves in an orderly fashion. Failure to comply with the directions of the hearing officer or hearing panel to obtain order may result in exclusion from the proceedings or in a decision adverse to the interests of the disorderly party and granting or denial of the relief sought, as appropriate.

8. Establishment of Waiting List

In establishing the waiting list for the converted project, the PHA shall utilize the project-specific waiting list that existed at the time of conversion. In addition, the waiting list must be maintained in accordance with PBV program requirements.

9. Choice-Mobility

Under the RAD-PBV program, converting residents are eligible to the right to move with a tenant based rental assistance voucher after 12 months of occupancy after conversion. (24CFR 983.260). Once the initial converting resident vacates, all MTW/ PBV waivers/requirements related to choice mobility shall apply. The tenant-based voucher comes from an existing voucher supply from the PHA and is subject to availability. The PHA will set aside 75% of turnover vouchers to be utilized for converting residents. If a tenant-based rental assistance voucher is unavailable, the family will be placed on a waiting list until such time that one becomes available.

10. **Agreement Waiver**
    For public housing conversions to PBV, there will be no Agreement to Enter into a Housing Assistance Payments (AHAP) contract. Therefore, all regulatory references to the Agreement (AHAP), including regulations under 24 CFR Part 983 Subpart D are waived.

11. **Inspections**
    The PBV requirements related to inspection shall apply to all RAD PBV units.

12. **When Total Tenant Payment Exceeds Gross Rent (over subsidy)**
    When total tenant payment (TTP) for families living in the Coverting Project prior to conversion, exceeds the Gross Rent of the unit, the unit for such families will remain under the HAP Contract. The rent to the owner for the unit will be (a) the family's TTP, less the Utility Allowance, or (b) the maximum LIHTC rent, if applicable. The unit will be considered part of the HAP contract and will remain eligible to receive future assistance should the resident's income decrease. In addition, the regulation requiring termination of assistance if a household does not receive subsidy for 180 days is also waived. Following conversion, all MTW / PBV over subsidy regulations will apply.

13. **Under-occupied units**
    If a family is in an under-occupied unit at the time of conversion, the family may remain in this unit until an appropriate sized unit becomes available in the covered project, but will be subject to move to an appropriate size unit once one becomes available. . Following conversion, all MTW / PBV regulations will apply.

PBV: Other Miscellaneous Provisions

1. **Access to Records, Including Requests for Information Related to Evaluation of Demonstration.** PHAs must agree to any reasonable HUD request for data to support program evaluation, including but not limited to project financial statements, operating data, Choice-Mobility utilization, and rehabilitation work. Please see Appendix IV for reporting units in Form HUD-50058.

2. **Additional Monitoring Requirement.** The PHA's Board must approve the operating budget for the covered project annually in accordance with HUD requirements.

3. **Davis-Bacon Act and Section 3 of the Housing and Urban Development Actof 1968 (Section 3).** Under existing PBV program rules, projects that qualify as "existing housing" under 24 CFR § 983.52(a) are not subject to Davis-Bacon (prevailing wages, the

4. Contract Work Hours and Safety Standards Act, and other related regulations, rules, and requirements) or Section 3 (24 CFR Part 135). However, the Davis-Bacon Act and Section 3 shall apply to all initial repairs that are identified in the Financing Plan to the extent that such repairs qualify as construction or rehabilitation, regardless of whether the project qualifies as "existing housing." Developmental requirements under 24 CFR §983.154 and fair housing provisions under 24 CFR § 983.152(c)(vi) continue to apply.

5. **Mandatory Insurance Coverage.** The project shall maintain at all times commercially available property and liability insurance to protect the project from financial loss and, to the extent insurance proceeds permit, promptly restore, reconstruct, and/or repair any damaged or destroyed property of a project, except with the written approval of HUD to the contrary.

6. **Future Refinancing.** Owners must receive HUD approval for any refinancing or restructuring of permanent debt within the HAP contract term to ensure the financing is consistent with long-term preservation. (Current lenders and investors are also likely to require review and approval of refinancing of the primary permanent debt.)

7. **Administrative Fees for Public Housing Conversions**. For the initial Calendar Year in which a project's assistance has been converted, RAD PBV projects will be funded with public housing money. Since the public housing funding will not have been transferred to the TBRA account and since this funding is not section 8 assistance the annual contributions contract (ACC) between the PHA and HUD will cover the project units, but be for zero dollars. For this transition period, the ACC will primarily serve as the basis for covering the units and requiring PHA compliance with HUD requirements, but it will not be (as it is in the regular PBV program) the funding vehicle for the PBV RAD vouchers. Given this, and given the fact that PHAs will be receiving full public housing funding for the PBV units during this transition period, PHAs will not receive ongoing section 8 administrative fee funding during this time.

[32] For PBV conversions that are not FHA-insured, a future HUD notice will describe project financial data that may be required to be submitted by a PBV owner for purposes of the evaluation, given that PBV projects do not submit annual financial statements to HUD/REAC.

Generally, PHAs receive ongoing administrative fees for units under a HAP contract, consistent with recent appropriation act references to "section 8(q) of the [United States Housing Act of 1937] and related appropriations act provisions in effect immediately before the Quality Housing and Responsibility Act of 1998" and 24 CFR 982.152(b). During the transition period mentioned in the preceding paragraph, these provisions are waived, and PHAs will not receive section 8 ongoing administrative fees for PBV RAD units.

After this transition period, the ACC will be amended to include section 8 funding that corresponds to the units covered by the ACC. At that time, the regular section 8 administrative fee funding provisions will apply.

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Site Selection and Neighborhood Standards Review

INLIVIAN has analyzed all currently known replacement sites for those RAD conversions that involve transfer of assistance. All proposed sites meet the current MTW Site and Neighborhood Standards as defined in INLIVIAN's MTW Agreement.

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Relocation Plans

INLIVIAN anticipates relocation at only one community, Tall Oaks, which is currently under redevelopment. However, should future renovation or redevelopment plans require relocation, Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 will be followed as applicable. Households will need to meet eligibility requirements at the time of admission.

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Significant Amendment Definition

As part of the Rental Assistance Demonstration (RAD), INLIVIAN is redefining the definition of a substantial deviation from the MTW Plan to exclude the following RAD- specific items:

a. Changes to the Capital Fund Budget produced as a result of each approved RAD Conversion, regardless of whether the proposed conversion will include use of additional Capital Funds;
b. Changes to the construction and rehabilitation plan for each approved RAD conversion;
c. Decisions or changes related to the financing structures for each approved RAD conversion including decisions to allocate PHA financial resources as a source of funds to support the RAD conversion initiatives; and
d. Decisions to apply MTW programmatic flexibility to post-conversion RAD developments.

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Appendix G: Lobbying Disclosures

Appendix H: FSS Incentive Payout Points

2022-1 MODIFICATION OF FSS PROGRAM INCENTIVE PAY POINTS

Pathway	Goal	Amount
Housing/Homeownership	Enrollment in Homeownership Education & Counseling	$250
	Completion of Homeownership counseling	$500
	Home Purchase	$1,250
	Move out of subsidized housing	$1,000
Asset Building/Financial Strength	Enroll in Financial Coaching/Edu	$250
	Credit Score Increase to 640 or better	$500
	Credit score increase to 680 or better	$500
	Open saving or Checking Account	$250
	Increase annual savings by $500	$500
Employment	Unemployed- Obtain employment of 20hrs or more**	$250
	Maintain employment for 12-months	$500
	Achieve Job Promotion	$500
Education/Training	Completion of training/certification program	$100
	Completion of GED or HSD Program	$250
	Completion of associate degree	$500
	Completion of bachelor's degree	$1,000
	Completion of Master's degree or higher	$1,500

*Annual Maximum deposit $2,000.

*Participants can achieve multiple goals within the year not to exceed $2,000.

**Unemployed-Obtain employment of 20hrs or more- eligible if unemployed at time of program enrollment. Participant is not eligible upon regaining employment after loss of employment.

Appendix I: Challenging Barriers and Milestone Program

Challenging Barriers Program

Purpose of Program: To provide funding to residents and HCV participants who have either a 1.) barrier to employment, as defined by the program and their Case Management Plan, or 2.) a barrier that does not allow Seniors (or near-Elderly) to age in place independently and with dignity.

Description of Program: The Challenging Barriers Program provides financial assistance to residents and HCV participants who face obstacles that limit their self-sufficiency or independence.

Eligibility

Residents and HCV participants are eligible for the Challenging Barriers Program if they meet the following criteria:

1. Applicant must be a current resident of an INLIVIAN subsidized property and listed on an active lease or HCV agreement.
2. Applicant may or may not be engaged in CORE programming.
3. Applicant must meet with CORE staff at an INLIVIAN site or with an HCV life coach, as appropriate, to submit a request for program assistance.

Eligibility is determined on a case-by-case basis, and special circumstances may be reviewed and approved by department management.

Program Stipulations:

- No more than 2 withdrawals may be made per year.
- Maximum $500 per withdrawal unless the resident or HCV participant can prove severe hardship. The total cannot exceed maximum allowable for the year.
- Annual maximum payout is $1,000 per household.
- All disbursements are subject to funding availability.

Challenging Barriers Financial Assistance

1. Debt Assistance (Destination Homeownership (DHO) Participants Only)

Purpose:
This assistance is designed to help individuals address specific debts identified by the DHO team as barriers to homeownership.

Required documents:

- Credit report
- Letter from debt collector
- Any additional documentation that substantiates the need for assistance

2. Vehicle Repair Assistance

Purpose:
This assistance is intended to help residents and HCV participants cover expenses related to repairing their personal vehicles. These repairs enable participants to continue working.

Required documents:

- Invoice or quote from a licensed and verifiable auto repair shop
- Proof of vehicle ownership (e.g., valid driver's license, vehicle registration, proof of insurance)

3. Training and Certification Assistance

Purpose:
This assistance covers fees associated with enrollment in approved training or certification programs that support the participant's progress toward program goals.

Required documents:
One of the following must be provided:

- Current invoice
- Schedule of classes with fees clearly indicated
- Official letter from the training facility confirming enrollment and associated costs

4. Medical Expense Assistance

Purpose:
This assistance requires a pre-approval meeting with the resident or HCV participant's life coach or services coordinator. Not all medical expenses are eligible; however, the life coach will evaluate each request and provide support when possible.

Required documents:

- Supporting documentation as requested by the life coach (e.g., invoices, estimates, or medical statements)

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5. Housekeeping Assistance

Purpose:
This assistance is available to residents and HCV participants who are subject to a lease violation or have received a housekeeping-related violation. Approved vendors provided by INLIVIAN will assist with cleaning the unit. In addition, the participant **must** agree to participate in an educational component offered by the cleaning company.

Required documents:

- Referral from the Service Coordinator, Property Management, or life coach
- Copy of the lease violation notice

The types of assistance and documentation requirements listed above are approved examples and do not represent an exhaustive list. INLIVIAN may provide additional types of assistance or request additional documentation, if approved by the appropriate leadership, to support participants in meeting program goals.

Milestone Program

Purpose of Program: To provide incentives to residents and HCV participants who meet specific milestones as defined by the program and their Case Management Plan.

Description of Program: Designated amounts for completion of activities will be established, and once the goal has been met, the participant may receive an incentive payment for reaching their goal or "milestone".

Eligibility

Residents and HCV Participants are eligible for a Milestone Incentive if they meet the following criteria:

1. Applicant must be a current resident of a Senior/Disabled housing community subsidized by INLIVIAN and listed on an active lease.
    a. Senior/Disabled residents residing on INLIVIAN identified family sites and Senior/Disabled HCV participants are eligible to participate in the program.
2. Applicant must be engaged in CORE programming.
3. Applicant must complete all criteria to be eligible to apply for the milestone incentive program. (*Note: Incentive criteria for Aging-In Place classes are predetermined prior to the class start date)*.

Milestones for residents/participants:

Milestone	Amount
Participation in wellness/aging-in-place programming	$50
Completion of computer course with certificate of completion	$100
Support Groups: Attend at least 5 professional support group sessions (AA, NA, nutrition, etc)	$100
Volunteer/Civic Services – Volunteering with community Resident Organization or outside agency at least 5 times, or 10 hours	$100
Employed 12 consecutive months	$200

Program Stipulations:

- All disbursements are subject to funding availability.
- All residents must not have any violations within the year, except for the Good Standing Program.
- Incentives may not be retroactive.
- Once a resident or HCV participant has met the 12-month threshold, no additional payments will be made.
- Support group payouts are a one-time only payout. Required sessions must be attended within a six-month period. Sign-off forms from a recognized support group will be required.
- The maximum amount earned per year per resident or HCV participant will be $600.