

Targeted Performance Item	Action	Mobile Housing Authority March 2024 Actions Taken Supporting Documentation Submitted	Birmingham Field Office March 2024 Comments
G01-01	The Appointing Official will take the necessary actions to hold Board members accountable to fulfill their duties and ensure a ready, willing, and able Board. If Board Members are not performing action must be taken in accordance with State Law to replace Board Members.	Agency updates are published monthly via MHAs website and social media platforms. To ensure local elected officials remain informed, the updates are emailed to them. In addition to receiving a copy of the Recovery Agreement containing FO comments monthly, MHA at the mayors request changed its monthly Board meeting from the second Tuesday to the Third Thursday so members of his executive team could attend the meetings. MHA remains committed to working with the city on mutually beneficial affordable housing projects. To that end, we will meet on an as needed basis to consider viable project opportunities. Thus far, the meetings have been report sessions on "All Things MHA."	CLOSED
G01-02	The PHA will take action to develop and implement a hiring plan to fill critical positions, Deputy Director, CFO, and Development Director, with qualified individuals with Housing Experience. The PHA will work with the City of Mobile to resolve hinderance of requirement to utilize the Personnel Board.	CEO Pierce has assembled a team of highly qualified industry professionals to temporarily fill these critical positions. As a result, MHA has and continues to make substantial operational and fiscal progress. However, CEO Pierce and the Board have failed to convince the city and the local legislative delegation that resolving the hindrance of MHA's required use of the Personnel Board is of paramount importance. Regrettably, after roughly six years of inaction by those in elected office, our minute optimism has evaporated. Nonetheless, we have approximately 80% of the Action Items and are committed to closing out the balance within 12 months. As we inch closer to achieving 98% compliance, MHA acknowledges its sustained performance improvement would not have occurred without the considerable technical assistance investments the FO made shortly after my arrival. Hence, it is vital we acknowledge that any enforcement action HUD is forced to take against MHA for failure to comply with this Action Item will not be will received nor reported negatively.	
G01-03	The PHA Board of Commissioners action of approval of the Asset Repositioning strategy all PHA properties.	Closed	CLOSED. However, MHA and their consultant, Econometrica, are taking another look at it.
G01-04	The PHA will develop a strategic plan to right size agency staffing due to implementation of Asset Repositioning.	CEO Pierce will hold an agency wide meeting Thursday, March 11 th to provide a timeline for the agency's rightsizing due to the implementation of Asset Repositioning. Management will continue stressing the importance of cross training and pledged to continue encouraging tax credit developers to hire the agency's property managers and maintenance staff.	The PHA will develop a strategic plan to right size agency staffing due to implementation of Asset Repositioning.
G01-05	Strengthen the Housing Choice Voucher Program.	Closed but updated: The HCV Team met with the Maryvale I developer (Hollyhand) to begin conversations with the development's property management team to coordinate lease up schedules for the property with an anticipated move-in date for the first 48 units of July 1st. Our plan is to continue conversations with them through the waitlist opening period so we can have a smooth handoff of potential tenants from the MHA PBV waitlist for this development. The HCV Team continued to plan for the relocation of the HCV office from the Eagle Drive location to the GM&O building for a move-in date of April 1, 2024. The HCV Team began talks with the HUD Shortfall Prevention Team, as we project approximately a \$1.1 million shortfall in December 2024. Based on our initial meetings, HCV leadership is taking the corresponding actions to reduce its leasing of new voucher holders as we await HUD's release of MHA's budget authority for 2024. The Program Administration team is implementing operational changes ahead of HOTMA implementation including assignment of caseloads to the HS-Is, based on an alpha-split of our portfolio and are assuming case load management for the families in their portfolio, which include, recertifications, voucher issuances for move requests, interim changes and rent increase requests.	CLOSED.

G01-05-01	Housing Choice Voucher training for staff.	Closed but updated: One OA 2 was promoted to a HS 1; one HS 1 was newly hired, and one HS 1 was promoted to a HS 2 in February. Three days of training will occur for all staff as we transition to the new office space. The department has seen an increase in sick leave utilization by team members due to seasonal cold, influenza and COVID-19 rates rising. The three-member compliance team will take the National Center for Housing Management (NCHM) Enterprise Income Verification (EIV) specialist training the first week of April; they will take the EIV Troubleshooting training when it becomes available later in the Spring. Training for the Inspections team on National Standard for the Physical Inspection of Real Estate (NSPIRE) implementation will occur later this quarter ahead of anticipated implementation in May.	CLOSED.
G01-05-02	Update PIC in regards to Housing Choice Voucher Program: HQS Inspections, improve reporting rate, etc.	Closed but updated: We are reporting 100% on this SEMAP indicator with 512 inspections scheduled in February, 182 of these units passed, 38 failed; 33 units were abated. The remote video inspection (RVI) protocol will remain the primary mode for conducting HQS inspections for all inspection types (i.e., initial, biennial, interim and quality control). Quality control inspections continue quarterly. The MHA reporting rate for the Section Eight Management Assessment Program (SEMAP) Indicator 9 was 100% in February with 181 reexaminations due, 220 completed and 335 past due. 54 families were terminated from the program for non-compliance with program rules and requirement or for being over-income. There are 80 families remaining on the waiting list. 119 families are searching for housing currently, with 137 vouchers issued and 57 leased in February.	CLOSED.
F01-01	CFO will monitor all procurement actions to ensure performance requirements and deadlines are adhered to.	Closed	CLOSED.
F01-02	The new CFO must establish and implement new policies and procedures for the Finance Department.	Closed	CLOSED.
F01-03	The PHA will submit quarterly Budget vs Actual reports to the FO 30 days after the end of the quarter.	The CFO will continue to ensure the quarterly financial reports are timely submitted to the Field Office. We completed the FY 2022 Q4 Reports, and submitted them to the Field Office on February 6, 2023. We finalized the FY 2023 Q1 Reports and submitted them to the Field Office on May 2, 2023. We are finalized the FY 2023 Q2 Reports and submitted them to the Field Office on August 3, 2023. In September 2023, we responded to questions raised by the FO with respect to the Q2 Reports. We finalized the Q3 Reports and submitted them to the Field Office in early November 2023. We finalized the FY <u>2023</u> Q4 Reports and submitted them to the Field Office on February 7, 2024.	Budget to actuals review completed, forwarded to PHA
F01-04	The PHA must provide HUD with a copy of the implemented Internal Control Policy and a copy of the Board Resolution approving the policy.	Closed	CLOSED.
F01-05	Resolve 2018 audit findings, including those pertaining to internal controls.	Closed	CLOSED.
F01-06	2020 Audited Submission: 4 Findings found from Field Office Review of IPA Audit. 2021 Audited Submission: PHA/Auditor Response: "Done by first week of March". 2022 Audited Submission: [Extension 4/30/2024] PHA/Auditor Response: "Should be done." 2023 Unaudited Submission: Per IPA Auditor: Completed by 09/30/2024.	The 2019 and 2020 Audits completed.	Final Audit Closing Letter for 2019 Audit issued to PHA. (See updates provided by FA to Action column)
M01-01	PHA will ensure that repayment agreements are maintained current and properly accounted for on the FDS.	Closed	CLOSED.
M01-02	Evaluate current TAR accounts and establish payment plans for tenants.	Closed	CLOSED.
M01-03	PHA will enforce Eviction policy for residents that are not in compliance with their repayment agreement.	Closed	CLOSED.
M01-04	PHA will lower turnaround time to <30 days.	Chief Asset Officer Casey Dickinson is still assessing.	Turnaround time still exceeds 30 days.
M01-05	PHA will increase HUD MTCS reporting to the 95% level and immediately submit 50058's for occupied units.	Closed	CLOSED.
M01-06	PHA will update/purge waiting list to select tenants for the programs according to HUD guidelines.	Closed	CLOSED.
M02-01	PHA will develop and implement occupancy plan for Orange Grove to maintain an occupancy rate of 95%.	As of 3/29/24, occupancy rate is 96.4%.	CLOSED

M02-02	PHA will develop and implement occupancy plan for Emerson Gardens to increase occupancy to 95%.	As of 3/29/24, occupancy rate is 97.9%.	CLOSED
M02-03	PHA will develop and implement occupancy plan for Downtown Renaissance I to maintain an occupancy rate of 95%.	As of 3/29/24, occupancy rate is 100%.	CLOSED
M02-04	PHA will develop and implement occupancy plan for Renaissance Townhomes to maintain an occupancy rate of 95%.	As of 3/29/24, occupancy rate is 97%.	CLOSED
M02-05	PHA will develop and implement occupancy plan for Renaissance Family to maintain an occupancy rate of 95%.	As of 3/29/24, occupancy rate is 96.5%.	CLOSED
M03-01	PHA will develop and implement occupancy plan for Gulf Village to increase occupancy to 95%.	As of 3/29/24, occupancy rate is 96.4%.	As of 4/25/24 occupancy rate is 97.49%
M03-02	PHA will develop and implement occupancy plan for Oaklawn Homes to increase occupancy to 95%.	As of 3/29/24, occupancy rate is 100%.	As of 4/25/24 occupancy rate is 97.89%
M03-03	PHA will develop and implement occupancy plan for Central Plaza Towers to increase occupancy to 95%.	As of 3/29/24, occupancy rate is 95%. No plan to increase occupancy at this time due to RAD application.	CLOSED
M04-01	PHA will immediately take action to submit a Section 18 Application for Thomas James Place.	Closed	CLOSED.
M04-02	PHA will immediately take action to submit a Section 18 Application for R. V. Taylor Plaza.	Closed	CLOSED.
M04-03	PHA will immediately take action to submit a Section 18 Application for Frank W. Boykin Towers.	Closed	CLOSED.
M05-01	PHA will hire a qualified consultant to oversee the entire RAD/Repositioning process. HUD will provide Technical Assistance to the PHA through a HUD Technical Assistance Contract to the PHA to assist in the development of a procurement action for the acquisition of the repositioning consultant.	Closed	CLOSED.
M05-02	PHA will submit the RAD applications in accordance with the scorecard.	Portfolio RAD application for was submitted and accepted for CPT, Oaklawn, Gulf Village and partial TJP and RVT. TJP and RVT are part of the Section 18 Disposition approval and a separate CHAP has been received for CPT, Oaklawn and Orange Grove. MHA is currently analyzing the best approach for Gulf Village, whether than is a Section 18 Disposition or RAD transaction. The Phase 2 properties will be submitted in accordance with the scorecard.	When all developments are addressed, PHA will need to submit to the FO with a plan in a separate document
M05-02-01	Submit RAD application for Central Plaza Towers - 288 under RAD; 96 PBV	CHAP issued.	CLOSED.
M05-02-02	Submit RAD application for Orange Grove Homes - 185 under RAD; 62 PBV	CHAP issued.	CLOSED
M05-02-03	Submit RAD application for Oaklawn Homes - 75 under RAD; 75 PBV	CHAP issued. MHA requested and received extensions for the CPT, Oaklawn, and Orange Grove Financing Plan deadlines to 3/2024. MHA is in the process of doing the PIC Inventory removal for Oaklawn.	CLOSED

M05-03	Within 60 day of the issuance of the CHAP the PHA must submit to HUD the action timeline for submission of the LIHTC 4% or 9%, Site and Neighborhoods Standards (SNS) for new construction and the Financing Plan.	MHAs Board approved a resolution to approve the MDA with Fairstead for CPT at its Friday, January 12 th meeting. The last final edits are being worked out to finalized the MDA prior to Feb. 29. Fairstead has submitted the project schedule, which includes a 4% LIHTC application submission by mid-to-late March to AHFA; the Financing Plan inputs for the Concept call by mid-to-late March and the Concept Call for late April, with closing scheduled by December. There is no new construction planned so not SNS needed. MHA has received an acceptable developer proposal for Oaklawn, but is postponed MDA negotiations, for a few months to continue discussing the City's interest in the property as well. Likewise, MHA had selected a developer for the R.V. Taylor Preservation project, but negotiations regarding the MDA has been postponed due to discussions with the City. Although the Orange Grove CHAP was received in July 2022, it has been pushed back to following the CPT and Oaklawn projects, at a minimum due to the high level needs at those sites. However, MHA plans to stage both the R.V. Taylor Preservation and Orange Grove redevelopment within a year of CPT and Oaklawn so as not to have MHA competing against itself for LIHTCs, but also to keep the forward momentum going on the repositioning overall. MHA does not presently plan on using 9% LIHTCs or new construction, which therefore would not trigger the SNS. MHA requested and received extensions for the CPT, Oaklawn, and Orange Grove Financing Plan deadlines to 3/2024. MHA is in the process of doing the PIC Inventory removal for Oaklawn.	Within 60 day of the issuance of the CHAP the PHA must submit to HUD the action timeline for submission of the LIHTC 4% or 9%, Site and Neighborhoods Standards (SNS) for new construction and the Financing Plan.
P01-01	The PHA must conduct an analysis to determine whether it is more cost effective and efficient to contract out property management of the portfolio. The PHA Board must make a determination on the best interest of the developments.	CEO Pierce, COO Nolan, CAO Bryant and consultant McGilvray are commencing their analysis to determine the most cost effective and efficient course of action relating to property management. We are still in the process of gathering data to prepare our analysis.	CLOSED.
P01-02	PHA will complete all Energy Audits and provide a copy to HUD.	Closed	CLOSED.
P01-03	PHA will complete all Physical Needs Assessments and provide a copy to HUD.	Closed	CLOSED.
P02-01	The Renaissance Family - improve or maintain the PASS Score of 37.6.	Closed	CLOSED.
P02-02	Downtown Renaissance - Improve or maintain the PASS Score 37.6.	Closed	CLOSED.
P02-03	Orange Grove Homes - Improve or maintain the PASS Score 36.8.	Closed	CLOSED.
P02-04	Emerson Gardens - Improve or maintain the PASS Score 36.8.	Closed	CLOSED.
P02-05	Renaissance Townhouses - Improve or maintain the PASS Score 34.2.	Closed	CLOSED.
P03-01	Gulf Village - Improve the PASS Score of 20.4 to at least 30.	Closed	CLOSED.
P03-02	Oaklawn Homes - Improve the PASS Score of 24.4 to at least 30.	Closed	CLOSED.
P03-03	Central Plaza Towers - Improve the PASS Score of 0 to at least 24.	Closed	CLOSED.

Non Recovery Agreement Action Item

Financial Statement Status	2020 Unaudited and Audited Submissions. Plan to ensure timely Submission.	The 2020 Unaudited and Audited submissions have been completed.	Resolved
Financial Statement Status	2021 Unaudited and Audited Submissions. Plan to ensure timely Submission	The FY 2021 Unaudited and Audited submissions have been completed.	Resolved
Financial Statement Status	2022 Unaudited and Audited Submissions: Plan to ensure timely Submission.	The FY 2022 Unaudited submission has been completed. New Auditors are confident the Audit will be completed ahead of the HUD approved Audit Extension deadline of April 30, 2024.	2022 Audit Submitted and under REAC Review