

**MINUTES OF THE**  
**SANTA FE COUNTY**  
**HOUSING AUTHORITY BOARD**

**March 26, 2019**

**I. OPENING BUSINESS**

**A. Call to Order**

This regular meeting of the Santa Fe County Housing Authority was called to order on the above-cited date in the Santa Fe County Legal Conference Room, at the County Courthouse at approximately 1:15 p.m. by County Commission Chair Anna Hamilton.

**B. Roll Call**

A quorum was established with the following Board members present:

**Members Present:**

Anna Hamilton, Commissioner  
Anna Hansen, Commissioner  
Ed Moreno, Commissioner  
Henry Roybal, Commissioner  
Joseph Loewy, Community Member

**Member(s) Excused:**

Rudy Garcia, Commissioner  
Cathy Hurtado, Resident Member

**Staff Present:**

Katherine Miller, County Manager  
Joseph Montoya, Housing Authority Director  
Rick Word, Assistant County Attorney  
Victor Gonzales, Project Manager  
Yvonne Herrera, Finance Department  
Penny Ellis-Green, Land Use Administrator  
Greg Shaffer, HR Director

**C. Approval of Agenda**

- 1. Amendments**
- 2. Tabled or Withdrawn Items**

Commissioner Hansen moved to approve the agenda. Mr. Loewy seconded and the motion carried by unanimous voice vote.

**D. Approval of Minutes: February 26, 2019**

Mr. Loewy moved to approve as presented. Commissioner Roybal seconded and the motion carried by unanimous voice vote.

**II. CONSENT AGENDA**

There were questions regarding item II B. 1 and it was pulled from the consent.

Upon motion by Commissioner Hansen and second by Commissioner Moreno, the consent agenda was unanimously approved as amended.

**A. Resolutions**

1. **Resolution No. 2019 5HB: A Resolution Concerning Civil Right Certification for the Santa Fe County Housing Authority**

**Consent Item for Discussion**

**B. Policy Change**

1. **Request Approval of Changes to the Santa Fe County Housing Authority's Management and Maintenance Policy as Directed by the Board**

Mr. Montoya reviewed the amendments that were made to the policy. Footers were added, a citation was added to Work Order System and a clause that "staff will make note of any unauthorized person residing in the unit." Under Emergency Maintenance Procedures it was added that "Risk Management will be contacted immediately if a situation warrants it." He also noted some additions to maintenance of Authority vehicles.

Commissioner Roybal recommended that Risk Management develop a tracking system for the Housing Authority's work orders. Mr. Montoya said the Authority maintains a work order log that denotes if Risk Management was contacted. He said they have upgraded to a tablet-type system so work orders can be entered and addressed in the field.

Mr. Loewy commended Mr. Montoya on a thorough, succinct policy. Mr. Montoya credited his staff and especially Victor Gonzales.

Commissioner Hansen moved to approve the policy changes. Commissioner Roybal seconded and the motion passed without opposition.

**III. DISCUSSION/INFORMATION ITEMS/PRESENTATIONS**

**A. Housing Authority Updates**

1. **Director's Report**

Mr. Montoya said they are still seeking to hire a senior accountant, housing voucher specialist and deputy housing director.

The roofs are expected to be finished by the end of March and the public close-out will

be scheduled for May. Ms. Miller expressed concern that May could jeopardize other CDBG money. Mr. Montoya appreciated Ms. Miller's concerns and said he talked with DFA and they informed him he has until the end of July. He recognized that the close-out process is cumbersome but was confident there was adequate time.

The unit that was flooded from the sewer has been completely remediated. During cleanup the tenant moved into an empty unit and is now moving back into her unit.

Mr. Montoya said staff was still working with the City of Española to address the sewer line maintenance which is the city's responsibility. Mr. Loewy requested that the sewer line issue be added as an agenda item.

Commissioner Hansen asked about the City of Española's water quality situation and Mr. Montoya said the County responded quickly to Española's needs. The County Fire Department provided bottled water. Commissioner Roybal said he talked to the mayor of Española who expressed his thanks to the County staff for providing immediate assistance. He understood the water issue has been addressed by taking one of the wells out of service.

Later in this meeting, Commissioner Roybal indicated that he received a text from the mayor of Española who informed him that the water quality issues were resolved although some wells were still offline.

## **2. CFP Report**

Mr. Gonzales provided the following updates:

- The CDBG grant for the roofing project is slated to be complete by the end of March
- Two units are in need of emergency roof replacement. Quotes were received and the project should be completed by the first week of May

## **3. Financial Report**

Mr. Montoya presented the financial report, noting that 2015 CFP must be closed out by the end of March. CFP 2016 needs to be 90 percent obligated by the end of March. The 2018 budget is not yet finalized. There were no changes to the 517 fund.

Mr. Montoya outlined the issues staff has encountered with the REAC submissions. He thanked the Finance Department for their assistance. Yvonne Herrera said she participated in a meeting with Mr. Montoya and HUD and the situation is being monitored.

## **4. Vacancy, Section 8, Wait List, Work Orders, Inspections Reports, Accounts Receivable Report and FSS Report**

Mr. Montoya said there was nothing out of the ordinary to report and they are maintaining 100 percent occupancy.

**VI. MATTERS FROM THE BOARD** - None were presented

**VII. MATTERS FROM THE PUBLIC** - None were presented

V. **MATTERS FROM THE COUNTY ATTORNEY**

**Executive Session: Limited Personnel Matters, as Allowed by Section 10-15(H)(2), NMSA 1978; Board Deliberations in Public Hearing(s) on the Agenda, as Allowed by Section 10-15-1(H)(3) NMSA 1978; Discussion of Contents of Competitive Sealed Proposals Pursuant to the Procurement Code During Contract Negotiations as Allowed by Section 10-15-1(H)(6); Threatened or Pending Litigation in Which Santa Fe County is or May Become a Participant, as Allowed by Section 10-15-1(H)(7) NMSA 1978; and, Discussion of the Purchase, Acquisition or Disposal of Real Property or Water Rights, as Allowed by Section 10-15-1(H)(8) NMSA 1978 Including:**

1. **Evaluation of Executive Director/Housing Operations**

Assistant County Attorney Word said the executive session is a continuation from the last meeting.

Mr. Loewy moved to meet in closed session to discuss the evaluation of the Executive Director. Commissioner Roybal seconded. The motion to go into executive session pursuant to NMSA Section 10-15-1-H (2) passed by unanimous roll call vote as follows:

Commissioner Garcia	Absent
Commissioner Hamilton	Aye
Commissioner Hansen	Aye
Commissioner Moreno	Aye
Commissioner Roybal	Aye
Mr. Loewy	Aye
Ms. Hurtado	Absent

[The Board met in closed session from 1:55 to 2:20 p.m.]

Commissioner Hansen made a motion to come out of executive session where the only item discussed was the evaluation of the Executive Director. The motion was seconded by Commissioner Roybal and approved unanimously.

VIII. **CONCLUDING BUSINESS**

A. **Announcements**

B. **Adjournment**

Having completed the agenda and with no further business to come before the Authority, Chair Hamilton adjourned the meeting at approximately 2:21 p.m.

Approved by:

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Anna Hamilton, Commissioner  
Housing Authority Board Chair



ATTEST TO:

GERALDINE SALAZAR  
COUNTY CLERK

Respectfully submitted by:

Karen Farrell, Wordswork

# DRAFT

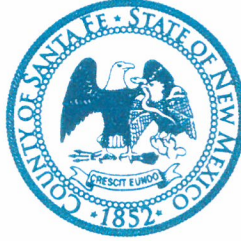
**Subject to Approval**

**Henry P. Roybal**  
*Commissioner, District 1*

**Anna Hansen**  
*Commissioner, District 2*

**Rudy N. Garcia**  
*Commissioner, District 3*

**Joe Loewy**  
*Housing Board Member*



**Joseph R. Montoya**  
*Executive Director*

**Anna T. Hamilton**  
*Commissioner, District 4*

**Ed Moreno**  
*Commissioner, District 5*

**Katherine Miller**  
*County Manager*

**Cathy Hurtado**  
*Resident Board Member*

## *MEMORANDUM*

**Date:** April 30, 2019

**To:** Santa Fe County Housing Authority Board

**From:** J. Jordan Barela, Deputy Director

**Via:** Joseph R. Montoya, Executive Director

**Item:** **Resolution 2019- \_\_\_\_\_ HB, A Resolution Approving the Santa Fe County Housing Authority's Payment Standard Schedule.**

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**Summary:**

Staff is requesting Approval of a Resolution to Approve the Santa Fe County Housing Authority's Payment Standard Schedule. The payment standard schedule is a yearly requirement from HUD.

**Background:**

Per 24 CFR 982.503(a)(1) the Santa Fe County Housing Authority must adopt the payment standard schedule that establishes voucher payment amounts for each Federal Register Fair Market Rent ("FMR") for Santa Fe County, adjusted for unit size. Staff has reviewed the 2019 FMRs for Santa Fe County published by the United States Department of Housing and Urban Development and has calculated the Housing Authority's Payment Standard Schedule which will take effect on July 1, 2019.



**SANTA FE COUNTY  
HOUSING AUTHORITY BOARD  
RESOLUTION NO. 2019 - \_\_\_\_\_ HB**

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**RESOLUTION APPROVING THE SANTA FE COUNTY  
HOUSING AUTHORITY'S PAYMENT STANDARD SCHEDULE**

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**WHEREAS**, pursuant to 42 U.S.C. Section 1437f(c)(1), the Department of Housing and Urban Development annually publishes in the Federal Register fair market rentals (FMR) for each market area in the United States; and

**WHEREAS**, under 24 CFR 982.503(a)(1), the Housing Authority ("Authority") "must adopt a payment standard schedule that establishes voucher payment standard amounts for each FMR area in the [Authority's] jurisdiction" for each "unit size"; and

**WHEREAS**, unit size is based on the number of bedrooms; and

**WHEREAS**, the Authority "may establish the payment standard amount for a unit size at any level between 90 percent and 110 percent of the published FMR for that unit size" (24 CFR 982.503(b)(1)(i)); and

**WHEREAS**, the Authority has reviewed the current average contract rents for the units under a Housing Assistance Payments Contract and has determined that the payment standards should be established at 110 percent of the published FMRs for the Santa Fe area.

**NOW, THEREFORE, BE IT RESOLVED** by the Santa Fe County Housing Authority Board that the following payment standard schedule is adopted, effective July 1, 2019:

Zero Bedroom	\$ 900
One Bedroom	\$ 1,021
Two Bedroom	\$ 1,176
Three Bedroom	\$ 1,547
Four Bedroom	\$ 1,706

**PASSED, APPROVED, AND ADOPTED THIS \_\_\_\_ DAY OF \_\_\_\_\_, 2019.**

**SANTA FE COUNTY HOUSING AUTHORITY BOARD**

By: \_\_\_\_\_  
Anna T. Hamilton, Chair

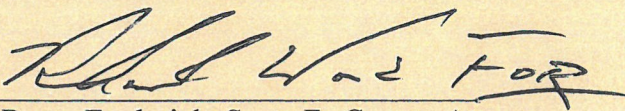


ATTEST:

\_\_\_\_\_  
Geraldine Salazar, Santa Fe County Clerk

Date: \_\_\_\_\_

APPROVED AS TO FORM:

  
\_\_\_\_\_  
R. Bruce Frederick, Santa Fe County Attorney

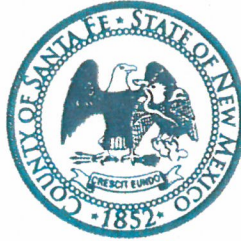


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*Commissioner, District 2*

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**Joe Loewy**  
*Housing Board Member*



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**Katherine Miller**  
*County Manager*

**Cathy Hurtado**  
*Resident Board Member*

## *MEMORANDUM*

**Date:** April 30, 2019  
**To:** Santa Fe County Housing Authority Board  
**From:** J. Jordan Barela, Deputy Director  
**Via:** Joseph R. Montoya, Executive Director

**Item:** **Resolution 2019- \_\_\_\_\_ HB, A Resolution Approving the Santa Fe County Housing Authority's Utility Schedule for the Section 8 Housing Choice Voucher Program.**

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**Summary:**

Staff is requesting Approval of a Resolution to establish the Santa Fe County Housing Authority's Utility Schedule for the Section 8 Housing Choice Voucher Program. The Utility schedule is a yearly requirement from HUD.

**Background:**

Per 24 CFR 982.517 the Santa Fe County Housing Authority must establish a utility allowance schedule for the Section 8 Housing Choice Voucher Program. Staff has reviewed and compared local utility rates and has made adjustments to the utility schedule for the Section 8 Housing Choice Voucher Program to reflect rate changes. The new revised utility schedule will take effect on July 1, 2019.



**SANTA FE COUNTY  
HOUSING AUTHORITY BOARD  
RESOLUTION NO. 2019-\_\_\_\_\_ HB**

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**A RESOLUTION APPROVING THE SANTA FE COUNTY HOUSING  
AUTHORITY'S UTILITY ALLOWANCE SCHEDULE FOR THE  
SECTION 8 HOUSING CHOICE VOUCHER PROGRAM**

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**WHEREAS**, 24 CFR Section 982.517 requires the Santa Fe County Housing Authority ("Authority") to establish a utility allowance schedule for the Section 8 Housing Choice Voucher Program ("Voucher Program"); and

**WHEREAS**, the utility allowance schedule must be reviewed annually to determine if there has been substantial change in utility rates or other charges of general applicability that would require an adjustment to the utility allowance schedule; and

**WHEREAS**, staff have reviewed the current utility allowance schedule for the Voucher Program and have determined that the allowances need to be adjusted; and

**WHEREAS**, 24 CFR 982.517 and Form HUD-52667 ("Allowances for Tenant-Furnished Utilities and Other Services") provide guidance and recommended procedures for adjusting utility allowances; and

**WHEREAS**, Exhibit A to this Resolution sets forth staff's proposed allowances for tenant-furnished utilities and other services("Allowances") for the Authority's Voucher Program; and

**WHEREAS**, staff prepared Exhibit A in accordance with 24 CFR 982.517 and Form HUD-52667.

**NOW, THEREFORE, BE IT RESOLVED** by the Santa Fe County Housing Authority Board ("Board") that:

1. The Allowances set out on Exhibit A to this Resolution are hereby adopted, effective July 1, 2019.
2. Exhibit A shall remain in effect until the Board adopts a subsequent resolution further revising the Allowances.
3. All previous Allowances adopted by the Board are hereby repealed.



**PASSED, APPROVED, AND ADOPTED THIS 30<sup>th</sup> April, 2019.**

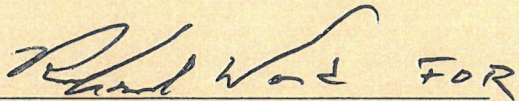
**SANTA FE COUNTY HOUSING AUTHORITY BOARD**

By: \_\_\_\_\_  
Anna T. Hamilton, Chair

**ATTEST:**

\_\_\_\_\_  
Geraldine Salazar, Santa Fe County Clerk

**APPROVED AS TO FORM:**

  
\_\_\_\_\_  
R. Bruce Fredrick, Santa Fe County Attorney



# Allowances for Tenant-Furnished Utilities and Other Services

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

OMB Approval No. 2577-0169  
(exp. 04/30/2018)

See Public Reporting Statement and Instructions on back

Locality		Unit Type					Date (mm/dd/yyyy)
SANTA FE COUNTY HOUSING AUTHORITY		Housing Choice Voucher Program					07/01/2019
Utility or Service		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas	15	17	20	22	27	38
	b. Bottle Gas	66	92	118	144	184	209
	c. Oil / Electric	38	50	61	73	90	102
	d. Coal / Other	0	0	0	0	0	0
Cooking	a. Natural Gas	1	1	2	3	4	4
	b. Bottle Gas	11	16	20	24	30	35
	c. Oil / Electric	14	16	18	20	22	24
	d. Coal / Other	0	0	0	0	0	0
Other Electric		17	24	31	37	48	54
Air Conditioning		8	11	14	17	21	24
Water Heating	a. Natural Gas	3	4	5	6	8	9
	b. Bottle Gas	29	40	52	63	81	92
	c. Oil / Electric	14	20	26	32	40	46
	d. Coal / Other	0	0	0	0	0	0
Water		39	48	57	66	79	88
Sewer		39	49	58	68	82	91
Trash Collection		35	35	35	35	35	35
Range/Microwave		8	8	8	8	8	8
Refrigerator		8	8	8	8	8	8
Other -- specify		0	0	0	0	0	0

**Actual Family Allowances** To be used by the family to compute allowance.

Complete below for the actual unit rented.

Name of Family

Address of Unit

Number of Bedrooms

Utility or Service	per month cost
Heating	\$
Cooking	
Other Electric	
Air Conditioning	
Water Heating	
Water	
Sewer	
Trash Collection	
Range/Microwave	
Refrigerator	
Other	
<b>Total</b>	\$

**Privacy Act Statement.** The Department of Housing and Urban Development (HUD) is authorized to collect the information required on this form by Section 8 of the U.S. Housing Act of 1937 (42 U.S.C. 1437f). Collection of family name and address is mandatory. The information is used to establish a utility allowance schedule for all utilities and other services used to determine the family's monthly housing assistance payment and family share. HUD will use this information to ensure that the costs are reasonable. HUD may disclose this information to Federal, State and local agencies when relevant to civil, criminal, or regulatory investigations and prosecutions. It will not be otherwise disclosed or released outside of HUD, except as permitted or required by law. Failure to provide any of the information may result in delay or rejection of Housing Assistance Payment contract.

This collection of information is authorized under Section 8 of the U.S. Housing Act of \_937 (42 U.S.C. 1437f). The information is used to establish a utility allowance schedule for all utilities and other services used to determine the family's monthly housing assistance payment and rental payment. HUD will use this information to ensure that the costs are reasonable.

### Instructions for Form HUD-52667, Allowances For Tenant Furnished Utilities and Other Services

Form HUD -52667 shall be completed by a H A for each different type of unit as explained below. Each form shall be reproduced by the H A and given to families with their Certificate or Voucher or subsequently i n c onnection w ith any r evisions. T he f orm w ill provide the family, while shopping for a unit, with the amount of the allowances for various types of units for rent. With these allowances t he f amily c an c ompare g ross r ents and fair m arket rents. Form HUD-52667 shall also be used by the HA to record the actual allowance for each family.

**Level of Allowance:** Utilities and other services are included in gross rent, and when they are n ot furnished by t he owner, a n allowance must be pr ovided t o t he family. A llowances must be adequate for all utilities and services not provided by the owner that were included in the fair market rent. The utility allowance schedule is based **on the typical cost of utilities and services paid by energy-conservative households that occupy housing of similar size and type in the same locality.** In developing the schedule, the HA must use normal patterns of consumption for the community as a whole and current utility rates. A llowances m ust not be based on energy consumption or costs above average or below average income families. The objective shall be to establish allowances bas ed on ac tual rates and average c onsumption estimates and should allow the majority of participating families an allowance that is adequate to cover expected average utility costs and other services over a 12-month period.

#### Determining Allowances:

- a. In general, HAs shall use to the extent possible local sources of i nformation on t he cost of ut ilities and services. T he following local sources should be contacted:
  - (1) Electric utility suppliers.
  - (2) Natural gas utility suppliers.
  - (3) Water and sewer suppliers.
  - (4) Fuel oil and bottle gas suppliers.
  - (5) Public service commissions.
  - (6) Real estate and property management firms.
  - (7) State and local agencies.
  - (8) Appliance sales or leasing firms.

- b. Recently ad opted utility al lowance s chedules f rom nei ghboring HAs with essentially the same type of housing stock should also be examined. In most cases fuel or utilities rates normally will not vary appreciably in neighboring communities and where data is not available in small communities' allowances for larger nearby communities may be used. Where local sources are inadequate, the H A m ay c onslt t he national a verage c onsumption d ata provided in Table 1 and make appropriate adjustments to reflect local conditions.
- c. The H A m ust es tablish s eparate heat ing an d c ooling allowances for the various types of existing housing in the locality with t he s ame number of bed rooms. D epending o n local housing stock, utility allowances must be established for the following unit types: detached houses, duplexes, row or townhouses, garden and high rise apartments and manufactured homes. In addition to establishing different heating and cooling al lowances f or v arious t ypes of structures, attention should be given to different allowances for w ater de pending on whether f amilies w ill hav e responsibilities for lawn care.
- d. The dat a t o be s olicted f rom the l ocal s ources shown ab ove should be as close as possible in form and detail to the format of form HUD -52667. I f pos sible, all c onsumption dat a s hould b e obtained for each unit size and type. If data is available only for an average unit size (2.5 bed rooms), multiply the utilities costs for the average unit by the following factors:

<u>Size of Unit</u>	<u>Factor</u>
0-BR	0.5
1-BR	0.7
2-BR	0.9
3-BR	1.1
4-BR	1.4
5-BR	1.6

Example: Natural gas heating cost for average sized un it is \$18.00 per month. The allowance for a 4-bedroom unit will be 1.4 X \$18.00 = \$25.00 (rounded to nearest dollar).

**Air Conditioning:** A llowances f or ai r conditioning m ust be established only for communities where the majority of units in the market provide centrally air conditioned units or appropriate wiring for tenant installed A/C units.

**Ranges and Refrigerators:** Allowances for ranges and refrigerators must be based on the lesser of the cost of leasing or installment purchasing of suitable equipment.

**Utility Rate Schedules:** The cost of gas and electricity varies according to amounts consumed as shown on the appropriate rate schedules. It is not possible to compute exactly the cost of electricity for any given function without knowing the total electrical usage for a unit. However, because neither the HA or the families know beforehand just what will be the combination of utilities for any unit rented, it will be necessary to approximate the allowances for each function (e.g., heating cooking, etc.) as follows:

For electricity the rates used for lighting, refrigeration and appliances (Table 1, Item I), should be from the top of the rate schedule or the higher unit costs. Allowances for electric cooking, water heating and space heating should be computed from the middle or lower steps in the rate schedules.

Similarly, allowances for gas used for water heating and cooking should be computed using rates from the top of the rate schedule and for heating from the lower steps.

**Supporting Documentation:** The HA shall maintain with the form HUD-52667 copies of all supporting documentation used in determining the allowances and any revisions. For instance, letters from local utility companies shall be attached plus any worksheets used by the HA in computing allowances. The material should contain, if possible, the quantities of the utilities that are the basis of the dollar allowances (e.g., kilowatt hours per unit). A copy of the utility allowance schedule must be sent to the HUD Field Office.

**Table 1**

**Average Allowances For Tenant Purchased Utilities**

Note: The consumption amounts listed below are inexact averages and must be used with caution when establishing allowances for actual projects.

	<u>Monthly Consumption</u>	
	<u>Units</u>	<u>2 1/2-BR (a)</u>
<b>I. Electricity</b>		
a. Lighting and Refrigeration	KWH	250-400 (b)
b. Cooking	KWH	110
c. Domestic Hot Water	KWH	340 (c)
d. Space Heating	KWH	680 (d)
e. Air Conditioning	KWH	180 (e)
<b>II. Natural Gas And Bottle Gas</b>		
a. Cooking	Therms	8
b. Domestic Hot Water	Therms	21 (c)
c. Space Heating	Therms	48 (d)
<b>III. Fuel Oil</b>		
a. Domestic Hot Water	Gals	17 (c)
b. Space Heating	Gals	40 (d)
<b>IV. Water</b>		
a. Domestic Use	Gals	8,000
b. Lawn	Gals	2,000

- (a) Estimated average consumption for a hypothetical 2 1/2 bedroom dwelling unit. All consumptions listed must be adjusted for the size of the dwelling unit. Factors shown under Determining Allowances, subparagraph d, may be used for making the adjustment.
- (b) Consumptions will vary considerably depending on electrical appliances used. Upper limit should be sufficient to provide 85 kilowatt hours for a clothes dryer and 50 kilowatt hours for a frost free refrigerator.
- (c) The temperature of local water supply varies by geographic area and will have considerable impact on energy used to heat domestic water. This estimate is for Northern Central geographic areas where the average city water temperature is approximately 50° F.
- (d) Consumptions are for housing insulated for the heating system installed. Normally a building designed for electric space heating is better insulated than one designed for gas or oil space heating equipment. Climatic conditions assumed to be 4,000 heating degree days and 0° F outside design temperature. Consumption must be adjusted for the normal heating degree days and the outside design temperature in the given geographic area.
- (e) Consumption estimated for 1,000 degree days cooling. Actual consumption will depend on many variables.

**Note:** The consumption amounts listed above are inexact averages and must be used with caution when establishing allowances for actual projects.

# Allowances for Tenant-Furnished Utilities and Other Services

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

OMB Approval No. 2577-0169  
(exp. 04/30/2018)

See Public Reporting Statement and Instructions on back

Locality		Unit Type					Date (mm/dd/yyyy)
SANTA FE COUNTY HOUSING AUTHORITY		Public Housing Program					07/01/2019
Utility or Service		Monthly Dollar Allowances					
		0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	a. Natural Gas	15	17	20	22	27	38
	b. Bottle Gas	66	92	118	144	184	209
	c. Oil / Electric	38	50	61	73	90	102
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	c. Oil / Electric	14	20	26	32	40	46
	d. Coal / Other	0	0	0	0	0	0
Water		39	48	57	66	79	88
Sewer		39	49	58	68	82	91
Trash Collection		35	35	35	35	35	35
Range/Microwave		8	8	8	8	8	8
Refrigerator		8	8	8	8	8	8
Other -- specify		0	0	0	0	0	0

**Actual Family Allowances** To be used by the family to compute allowance.  
Complete below for the actual unit rented.

		Utility or Service	per month cost
Name of Family		Heating	\$
		Cooking	
		Other Electric	
		Air Conditioning	
		Water Heating	
		Water	
		Sewer	
		Trash Collection	
		Range/Microwave	
		Refrigerator	
Address of Unit		Other	
		Total	\$
Number of Bedrooms			

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This collection of information is authorized under Section 8 of the U.S. Housing Act of 1937 (42 U.S.C. 1437f). The information is used to establish a utility allowance schedule for all utilities and other services used to determine the family's monthly housing assistance payment and rental payment. HUD will use this information to ensure that the costs are reasonable.

**Instructions for Form HUD-52667, Allowances For Tenant Furnished Utilities and Other Services**

Form HUD-52667 shall be completed by a H A for each different type of unit as explained below. Each form shall be reproduced by the H A and given to families with their Certificate or Voucher or subsequently in connection with any revisions. The form will provide the family, while shopping for a unit, with the amount of the allowances for various types of units for rent. With these allowances the family can compare gross rents and fair market rents. Form HUD-52667 shall also be used by the HA to record the actual allowance for each family.

**Level of Allowance:** Utilities and other services are included in gross rent, and when they are not furnished by the owner, an allowance must be provided to the family. Allowances must be adequate for all utilities and services not provided by the owner that were included in the fair market rent. The utility allowance schedule is based on the typical cost of utilities and services paid by energy-conservative households that occupy housing of similar size and type in the same locality. In developing the schedule, the HA must use normal patterns of consumption for the community as a whole and current utility rates. Allowances must not be based on energy consumption or costs above average or below average income families. The objective shall be to establish allowances based on actual rates and average consumption estimates and should allow the majority of participating families an allowance that is adequate to cover expected average utility costs and other services over a 12-month period.

**Determining Allowances:**

- a. In general, HAs shall use to the extent possible local sources of information on the cost of utilities and services. The following local sources should be contacted:
  - (1) Electric utility suppliers.
  - (2) Natural gas utility suppliers.
  - (3) Water and sewer suppliers.
  - (4) Fuel oil and bottle gas suppliers.
  - (5) Public service commissions.
  - (6) Real estate and property management firms.
  - (7) State and local agencies.
  - (8) Appliance sales or leasing firms.

- b. Recently adopted utility allowance schedules from neighboring HAs with essentially the same type of housing stock should also be examined. In most cases fuel or utilities rates normally will not vary appreciably in neighboring communities and where data is not available in small communities' allowances for larger nearby communities may be used. Where local sources are inadequate, the H A may consult the national average consumption data provided in Table 1 and make appropriate adjustments to reflect local conditions.
- c. The H A must establish separate heating and cooling allowances for the various types of existing housing in the locality with the same number of bedrooms. Depending on local housing stock, utility allowances must be established for the following unit types: detached houses, duplexes, row or townhouses, garden and high rise apartments and manufactured homes. In addition to establishing different heating and cooling allowances for various types of structures, attention should be given to different allowances for water depending on whether families will have responsibilities for lawn care.
- d. The data to be solicited from the local sources shown above should be as close as possible in form and detail to the format of form HUD-52667. If possible, all consumption data should be obtained for each unit size and type. If data is available only for an average unit size (2.5 bedrooms), multiply the utilities costs for the average unit by the following factors:

Size of Unit	Factor
0-BR	0.5
1-BR	0.7
2-BR	0.9
3-BR	1.1
4-BR	1.4
5-BR	1.6

Example: Natural gas heating cost for average sized unit is \$18.00 per month. The allowance for a 4-bedroom unit will be 1.4 X \$18.00 = \$25.00 (rounded to nearest dollar).

**Air Conditioning:** Allowances for air conditioning must be established only for communities where the majority of units in the market provide centrally air conditioned units or appropriate wiring for tenant installed A/C units.



**Ranges and Refrigerators:** Allowances for ranges and refrigerators must be based on the lesser of the cost of leasing or installment purchasing of suitable equipment.

**Utility Rate Schedules:** The cost of gas and electricity varies according to amounts consumed as shown on the appropriate rate schedules. It is not possible to compute exactly the cost of electricity for any given function without knowing the total electrical usage for a unit. However, because neither the HA or the families know beforehand just what will be the combination of utilities for any unit rented, it will be necessary to approximate the allowances for each function (e.g., heating cooking, etc.) as follows:

For electricity the rates used for lighting, refrigeration and appliances (Table 1, Item I), should be from the top of the rate schedule or the higher unit costs. Allowances for electric cooking, water heating and space heating should be computed from the middle or lower steps in the rate schedules.

Similarly, allowances for gas used for water heating and cooking should be computed using rates from the top of the rate schedule and for heating from the lower steps.

**Supporting Documentation:** The HA shall maintain with the form HUD-52667 copies of all supporting documentation used in determining the allowances and any revisions. For instance, letters from local utility companies shall be attached plus any worksheets used by the HA in computing allowances. The material should contain, if possible, the quantities of the utilities that are the basis of the dollar allowances (e.g., kilowatt hours per unit). A copy of the utility allowance schedule must be sent to the HUD Field Office.

**Table 1**

**Average Allowances For Tenant Purchased Utilities**

Note: The consumption amounts listed below are inexact averages and must be used with caution when establishing allowances for actual projects.

Monthly Consumption

Units                      2 1/2-BR (a)

**I. Electricity**

a. Lighting and Refrigeration	KWH	250-400 (b)
b. Cooking	KWH	110
c. Domestic Hot Water	KWH	340 (c)
d. Space Heating	KWH	680 (d)
e. Air Conditioning	KWH	180 (e)

**II. Natural Gas And Bottle Gas**

a. Cooking	Therms	8
b. Domestic Hot Water	Therms	21 (c)
c. Space Heating	Therms	48 (d)

**III. Fuel Oil**

a. Domestic Hot Water	Gals	17 (c)
b. Space Heating	Gals	40 (d)

**IV. Water**

a. Domestic Use	Gals	8,000
b. Lawn	Gals	2,000

- (a) Estimated average consumption for a hypothetical 2 1/2 bedroom dwelling unit. All consumptions listed must be adjusted for the size of the dwelling unit. Factors shown under Determining Allowances, subparagraph d, may be used for making the adjustment.
- (b) Consumptions will vary considerably depending on electrical appliances used. Upper limit should be sufficient to provide 85 kilowatt hours for a clothes dryer and 50 kilowatt hours for a frost free refrigerator.
- (c) The temperature of local water supply varies by geographic area and will have considerable impact on energy used to heat domestic water. This estimate is for North Central geographic areas where the average city water temperature is approximately 50° F.
- (d) Consumptions are for housing insulated for the heating system installed. Normally a building designed for electric space heating is better insulated than one designed for gas or oil space heating equipment. Climatic conditions assumed to be 4,000 heating degree days and 0° F outside design temperature. Consumption must be adjusted for the normal heating degree days and the outside design temperature in the given geographic area.
- (e) Consumption estimated for 1,000 degree days cooling. Actual consumption will depend on many variables.

**Note:** The consumption amounts listed above are inexact averages and must be used with caution when establishing allowances for actual projects.