

SANTA FE COUNTY BOARD OF COMMISSIONERS

RESOLUTION NO.

2004-37

SANTA FE COUNTY BOARD OF HOUSING COMMISSIONERS

RESOLUTION NO.

2004-02

PHA/IHA Board Resolution

U.S. Department of Housing

OMB Approval No. 2577-0028 (Exp. 6/30/2001)

Approving Operating Budget or Calculation of

and Urban Development

Performance Funding System Operating Subsidy

Office of Public and Indian Housing

Public reporting burden for this collection of information is estimated to average 15 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless that collection displays a valid OMB control number.

This information is required by Section 6(c)(4) of the U.S. Housing Act of 1937. The information is the operating budget for the low-income housing program and provides a summary of proposed/budgeted receipts and expenditures, approval of budgeted receipts and expenditures, and justification of certain specified amounts. HUD reviews the information to determine if the operating plan adopted by the PHA and the amounts are reasonable and that the PHA is in compliance with procedures prescribed by HUD. Responses are required to obtain benefits. This information does not lend itself to confidentiality.

Santa Fe County

Acting on behalf of the Board of Commissioners of the below-named Public Housing Agency (PHA)/Indian Housing Authority (IHA), as its Chairman, I make the following certifications and agreements to the Department of Housing and Urban Development (HUD) regarding the Board's approval of (check one or more as applicable):

(date)

- ☐ Operating Budget Submitted on: _____
- ☐ Operating Budget Revision Submitted on: _____
- ☒ Calculation of Performance Funding System Submitted on: 03/30/2004
- ☐ Revised Calculation of Performance Funding System Submitted on: _____

I certify on behalf of the: (PHA/IHA Name) Santa Fe County Housing Authority
that:

1. All regulatory and statutory requirements have been met;
2. The PHA has sufficient operating reserves to meet the working capital needs of its developments;
3. Proposed budget expenditures are necessary in the efficient and economical operation of the housing for the purpose of serving low-income residents;
4. The budget indicates a source of funds adequate to cover all proposed expenditures;
5. The calculation of eligibility for Federal funding is in accordance with the provisions of the regulations;
6. All proposed rental charges and expenditures will be consistent with provisions of law;
7. The PHA/IHA will comply with the wage rate requirements under 24 CFR 968.110(e) and (f) or 24 CFR 905.120(c) and (d);
8. The PHA/IHA will comply with the requirements for access to records and audits under 24 CFR 968.110(i) or 24 CFR 905.120(g); and
9. The PHA/IHA will comply with the requirements for the reexamination of family income and composition under 24 CFR 960.209, 990.115 and 905.315.

FINANCE DEPARTMENT APPROVAL:**APPROVED AS TO LEGAL FORM AND SUFFICIENCY:**

Susan G. Lucero
Susan G. Lucero
Santa Fe County Finance Director

3-22-04
Date

Stephen C. Ross
Stephen C. Ross
Santa Fe County Attorney

3-22-04
Date

I hereby certify that the information stated within, as well as any information provided in the accompaniment herewith, is true and accurate.

Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Board Chairman's Name (Type)	Signature	Date
Paul Campos	<u>[Signature]</u>	03/30/2004

Previous editions obsolete
ATTEST: Rebecca Bustamante
Rebecca Bustamante
Santa Fe County Clerk

DATE: 3/31/04

form HUD-52574 (10/95)
ref. Handbook 7575.1

**Operating Fund
Calculation of Operating Subsidy
PHA-Owned Rental Housing**

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

OMB Approval No. 2577-0029 (exp. 10/31/2004)

Section 1																			
a) Name and Address of Public Housing Agency Santa Fe County Housing Authority 52 Camino de Jacobo Santa Fe, NM 87507						b) Budget Submission to HUD required ☐ Yes ☒ No													
c) Type of Submission ☒ Original ☐ Revision No.																			
d) No. of HA Units	e) Unit Months Available (UMAs)	f) Subject FYE	g) ACC Number	h) Operating Fund Project Number			i) (Reserved)												
211	2,532	06/30/2005	FW-5170	N	M	0	5	0	0	0	1	0	5	J					
Section 2																			
Line No.	Description	Requested by PHA (PUM)					HUD Modifications (PUM)												
Part A. Allowable Expenses and Additions																			
01	Previous allowable expense level (Part A, Line 08 of form HUD-52723 for previous year)	252.12																	
02	Part A, Line 01 multiplied by .005	1.26																	
03	Delta from form HUD-52720-B, if applicable (see instructions)																		
04	"Requested" year units from latest form HUD-52720-A (see instructions)	211																	
05	Add-ons to allowable expense level from previous fiscal year (see instructions)																		
06	Total of Part A, Lines 01, 02, 03 and 05	253.38																	
07	Inflation factor	1.025																	
08	Revised allowable expense level (AEL) (Part A, Line 06 times Line 07)	259.71																	
09	Transition Funding																		
10	Increase to AEL																		
11	Allowable utilities expense level from form HUD-52722-A	75.59																	
12	Actual PUM cost of Independent Audit (IA) (Through FYE 6/30/03)	4.34																	
13	Costs attributable to deprogrammed units																		
14	Total Allowable Expenses and Additions (Sum of Part A, Lines 08 thru 13)	339.64																	
Part B. Dwelling Rental Income																			
01	Total rent roll (as of 3/ /2004)	\$	28,991																
02	Number of occupied units as of rent roll date	178																	
03	Average monthly dwelling rental charge per unit for current budget year (Part B, Line 01 + Line 02)	162.87																	
04	Average monthly dwelling rental charge per unit for prior budget year	127.86																	
05	Average monthly dwelling rental charge per unit for budget year 2 years ago	131.36																	
06	Three-year average monthly dwelling rental charge per unit ((Part B, Line 03+Line 04+Line 05)+ 3)	140.70																	
07	50/50 Income split ((Part B, Line 03 + Line 06) + 2)	151.79																	
08	Average monthly dwelling rental charge per unit (lesser of Part B, Line 03 or Line 07)	151.79																	
09	Rental income adjustment factor	1.03							1.										
10	Projected average monthly dwelling rental charge per unit (Part B, Line 08 times Line 09)	156.34																	
11	Projected occupancy percentage from form HUD-52728	97%							%										
12	Projected average monthly dwelling rental income per unit (Part B, Line 10 times Line 11)	151.65																	
Part C. Non-dwelling Income																			
01	Other income																		
02	Total operating receipts (Part B, Line 12 plus Part C, Line 01)	151.65																	
03	PUM deficit or (Income) (Part A, Line 14 minus Part C, Line 02)	187.99																	
										Requested by PHA (Whole dollars)					HUD Modifications (Whole dollars)				
04	Deficit or (Income) before add-ons (Part C, Line 03 times Section 1, e)	475.991																	

Line No.	Description	Requested by PHA (Whole Dollars)	HUD Modifications (Whole Dollars)
Part D. Add-ons for changes in Federal law or regulation and other eligibility			
01	FICA contributions		
02	Unemployment compensation		
03	Family Self Sufficiency Program		
04	Energy Add-On for loan amortization		
05	Unit reconfiguration		
06	Non-dwelling units approved for subsidy	3,117	
07	Long-term vacant units		
08	Phase Down for Demolitions		
09	Units Eligible for Resident Participation: Occupied Units (Part B, Line 02)	178	
10	Employee Units		
11	Police Units		
12	Total Units Eligible for Resident Participation (Sum of Part D, Lines 09 thru 11)	178	
13	Funding for Resident Participation (Part D, Line 12 x \$25)	4,450	
14	Other approved funding, not listed (Specify in Section 3)		
15	Total add-ons (sum of Part D, Lines 01, 02, 03, 04, 05, 06, 07, 08, 13 and 14)	7,567	
Part E. Calculation of Operating Subsidy Eligibility Before Adjustments			
01	Deficit or (Income) before adjustments (Total of Part C, Line 04 and Part D, Line 15)	483,558	
02	Actual cost of Independent Audit (IA)	11,000	
03	Operating subsidy eligibility before adjustments (greater of Part E, Line 01 or Line 02) (If less than zero, enter zero (0))	494,558	
Part F. Calculation of Operating Subsidy Approvable for Subject Fiscal Year (Note: Do not revise after the end of the subject FY)			
01	Utility Adjustment for Prior years		
02	Additional subject fiscal year operating subsidy eligibility (specify)		
03	Unfunded eligibility in prior fiscal years to be obligated in subject fiscal year		
04	HUD discretionary adjustments		
05	Other (specify)		
06	Other (specify)		
07	Unfunded portion due to proration	()	()
08	Net adjustments to operating subsidy (total of Part F, Lines 01 thru 07)		
09	Operating subsidy approvable for subject fiscal year (total of Part E, Line 03 and Part F, Line 08)		
HUD Use Only (Note: Do not revise after the end of the subject FY)			
10	Amount of operating subsidy approvable for subject fiscal year not funded		()
11	Amount of funds obligated in excess of operating subsidy approvable for subject fiscal year		
12	Funds obligated in subject fiscal year (sum of Part F, Lines 09 thru 11) (Must be the same as line 690 of the Operating Budget, form HUD-52564, for the subject fiscal year) Appropriation symbol(s):		
Part G. Memorandum of Amounts Due HUD, Including Amounts on Repayment Schedules			
01	Total amount due in previous fiscal year (Part G, Line 04 of form HUD-52723 for previous fiscal year)		
02	Total amount to be collected in subject fiscal year (Identify individual amounts under Section 3)	()	()
03	Total additional amount due HUD (Include any amount entered on Part F, Line 11) (Identify individual amounts under Section 3)		
04	Total amount due HUD to be collected in future fiscal year(s) (Total of Part G, Lines 01 thru 03) (Identify individual amounts under Section 3)		

Line No.	Description	Requested by PHA (Whole Dollars)	HUD Modifications (Whole Dollars)
Part H. Calculation of Adjustments for Subject Fiscal Year			
This part is to be completed only after the subject fiscal year has ended			
01	Indicate the types of adjustments that have been reflected on this form: ☐ Utility Adjustment ☐ HUD discretionary adjustment (Specify under Section 3)		
02	Utility adjustment from form HUD-52722-B		
03	Deficit or (Income) after adjustments (total of Part E, Line 01 and Part H, Line 02)		
04	Operating subsidy eligibility after year-end adjustments (greater of Part E, Line 02 or Part H, Line 03)		
05	Part E, Line 03 of latest form HUD-52723 approved during subject FY (Do not use Part E, Line 03 of this revision)		
06	Net adjustments for subject fiscal year (Part H, Line 04 minus Part H, Line 05)		
07	Utility adjustment (enter same amount as Part H, Line 02)		
08	Total HUD discretionary adjustments (Part H, Line 06 minus Line 07)		
09	Unfunded portion of utility adjustment due to proration		
10	Unfunded portion of HUD discretionary adjustment due to proration		
11	Prorated utility adjustment (Part H, Line 07 plus Line 09)		
12	Prorated HUD discretionary adjustment (Part H, Line 08 plus Line 10)		
Section 3			
Remarks (provide part and line numbers)			



COUNTY OF SANTA FE)
STATE OF NEW MEXICO) ss
BCC RESOLUTIONS
PAGES: 9
I Hereby Certify That This Instrument Was Filed for
Record On The 1ST Day Of April, A.D., 2004 at 10:30
And Was Duly Recorded as Instrument # **1321013**
Of The Records Of Santa Fe County
Witness My Hand And Seal Of Office
Rebecca Bustamante
Deputy County Clerk, Santa Fe, NM

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.
Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Signature of Authorized HA Representative & Date:	Signature of Authorized Field Office Representative & Date:
X	X

**HA Calculation of
Occupancy Percentage
for a Requested Budget Year (RBY)**

PHA/IHA-Owned Rental Housing Performance
Funding System (PFS)

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

OMB Approval No. 2577-0066
(Exp. 12/31/2002)

1a. Name and Address of PHA/IHA (Include Street Address, City, State, Zip Code) Santa Fe County Housing Authority 52 Camino de Jacobo Santa Fe, NM 87507		2a. Contact (Person who can best answer questions about this submission) Mary Ann Burr	
		2b. Contact's Phone Number (include area code) (505) 992-3069	
3. RBY Beginning Date: (mo/day/yyyy) 07/01/2004	4. Type of Submission ☒ Original ☐ Revision No. ()	5. PASALOCOS Project Number NM-450-001-05J	6. Report Date (mo/day/yyyy) (check one box) ☐ Actual Day ☒ Average for Actual Month 03/2004
7. Data Source ☐ form HUD-51234 ☒ Rent Roll Records			

Part A. Actual Occupancy Data as of Report Date

8. Units Occupied	178
9. Units Available	211
10. Actual Occupancy Percentage (Divide line 8 by line 9; multiply by 100 and round to nearest whole)	85 %
11. If the HA-wide occupancy percentage shown on line 10 is 97% or greater and the HA believes that an average occupancy rate of at least 97% is sustainable for the RBY, then check the box below. You have completed the form and do not need to proceed further. ☐ High Occupancy HA: Occupancy Percentage is 97% or higher and is sustainable for the RBY → Use 97% as the Projected Occupancy Percentage on Part B, line 11 of form HUD-52723	
12. Units vacant as of Report Date (subtract line 8 from line 9 and enter result)	33
13. If the result on line 12 is five or fewer vacant units and the HA believes that during the RBY: 1) the inventory (line 9) will not change; and, 2) the number of vacant units on line 12 will be vacant for the full RBY, then check the box below. You have completed the form and do not need to proceed further. ☐ High Occupancy HA with five or fewer vacant units → Use line 10 for the Projected Occupancy Percentage on Part B, line 11 of form HUD-52723	

Part B. Distribution of Actual Vacancies By Major Cause Given below are circumstances and actions recognized by HUD as possible causes of vacancies that are beyond the control of the HA to correct. If appropriate, please distribute the number of vacant units reported on line 12 among these causes. Attach sheet identified with HA name and address, the RBY beginning date, and ACC number. Use the sheet to describe, for each circumstance; when the circumstance occurred; the location of the units involved; why the circumstance is preventing the HA from occupying, selling, demolishing, rehabilitating, reconstructing, consolidating or modernizing the vacant units; and the likelihood that these circumstances will be mitigated or eliminated in the RBY.

14. Units vacant because of litigation (e.g., units that are being held vacant as part of court-ordered or HUD-approved desegregation plan)	0
15. Units vacant because of Federal, Tribal, or State laws of general applicability. (Note: do not include units vacant only because they do not meet minimum construction or habitability standards.)	0
16. Units vacant due to changing market conditions	0
17. Units vacant because of natural disaster	0
18. Units vacant because of insufficient funding for otherwise approvable CIAP application	0
19. RMC-managed units vacant because of failure of HA to fund approvable request for Federal modernization funding (This line for use only by RMCs)	0
20. Units vacant because of casualty loss and need to settle insurance claims	0
21. Total Units Vacant Due To Circumstances Beyond The HA's Control (Enter sum of lines 14 - 20)	0
22. Units vacant after adjusting for circumstances beyond the HA's control (Subtract line 21 from line 12)	33
23. If the result on line 22 is five or fewer vacant units and the HA believes that during the RBY: 1) the inventory (line 9) will not change; and, 2) the number of vacant units on both lines 21 and 22 will be vacant for the full RBY, then check the box below. You have completed the form and do not need to proceed further. ☐ High Occupancy HA with five or fewer vacant units after adjustment for vacancies beyond its control → Use line 10 for the Projected Occupancy Percentage on Part B, line 11 of form HUD-52723	
24. Vacancy Percentage after adjusting for beyond control circumstances (Divide line 22 by line 9, multiply by 100, and round to nearest whole)	16 %
25. If the result on line 24 is 3% or less and the HA believes that during the RBY: 1) the inventory (line 9) will not change; and, 2) the number of vacant units on lines 21 and 22 will be vacant for the full RBY, then check the box below. You have completed the form and do not need to proceed further. ☐ High Occupancy HA: 3% or less vacancy rate after adjustment for vacancies beyond control → Use line 10 for the Projected Occupancy Percentage on Part B, line 11 of form HUD-52723	

This form replaces forms HUD-52728-A thru -C which have been canceled. Previous edition is obsolete.

Page 1 of 3

form HUD-52728 (8/2001)
ref Handbook 7475.13

Part C. Status of Units Undergoing Modernization as of Report Date If changes occur after the Report Date but prior to submission of this form, the most current status will be shown.

26. Protected Units	Occupied Units	Vacant Units
a. Number of units that are under modernization construction (contract awarded or force account work started)		
b. Number of units not under construction contract but included in a HUD-approved modernization budget where the time period for placing the units under construction (two FFYs after FFY of approval) has not yet expired.		
27. Unprotected Units: Number of units included in a HUD-approved modernization budget where the time period for placing the units under construction (two FFYs after FFY of approval) has expired.		

Part D. Units Estimated to be Available for Occupancy During RBY	(a) No. of Units	(b) Avg. No. of Mos. in RBY	(c) No. of Unit Mos. (a x b)
28. Units Available as of Report Date (Enter line 9)	211	12	2,532
29. Additional Units Available During RBY because of Development/Acquisition of PFS-Eligible projects	+		+
30. Units Unavailable During RBY because of Demolition/Disposition/Conversion Actions Approved By HUD	-		-
31. Total (Add lines 28 and 29; subtract line 30)	211		2,532

Part E. Units Estimated to be Occupied During RBY	(a) No. of Units	(b) Avg. No. of Mos. in RBY	(c) No. of Unit Mos. (a x b)
32. Units Occupied as of Report Date (Enter line 8)	178	12	2,136
33. Additional Units Occupied during RBY because of Development/Acquisition of PFS-Eligible Projects	+		+
34. Reoccupancy during RBY of Units Vacated for Circumstances Beyond the HA's Control	+		+
35. Reoccupancy during RBY of Vacant Units in a Funded Modernization Program	+		+
36. Occupied Units in Funded Modernization Program Being Vacated during RBY	-		-
37. Occupied Units Being Vacated during RBY because of Demolition/Disposition/Conversion Actions Approved by HUD. If there are occupied units that become vacant after the Report Date but before the start of the RBY because of circumstances and actions beyond the HA's control, place that number here () and include in total shown on 37. Attach separate sheet with same information requested in Part C.			
38. Total (Add lines 32-35, subtract lines 36 and 37)	178		2,136

Part F. Occupancy Percentage During RBY	
39. Total Unit Months of Occupancy (Enter line 38c)	2,136
40. Total Unit Months Available for Occupancy (Enter line 31c)	2,532
41. Occupancy Percentage for RBY (Divide line 39 by line 40; multiply by 100 and round to nearest whole)	85 %
42. Average Number of Vacant Units During RBY (Subtract line 39 from line 40; divide result by 12 and round to nearest whole)	396

43. If the result on line 41 is 97% or higher or if the result on line 42 is five or less, then check the appropriate box below. You have completed the form and do not need to proceed further.

Stop & Note ☐ a. High Occupancy HA: Occupancy Percentage is 97% or higher for the RBY → Use 97% as the Projected Occupancy Percentage on Part B, line 11 of form HUD-52723

☐ b. High Occupancy HA with five or fewer vacant units → Use line 41 for the Projected Occupancy Percentage on Part B, line 11 of form HUD-52723

Part G. Vacancy Percentage for RBY Adjusted for Modernization	
44. Total Unit Months of Vacancy in RBY (Enter line 40 less line 39)	396
45. Total Unit Months for Vacant Units In Funded Mod. and Under Construction or Funded for Construction (Sum the vacant units of lines 26a and b; multiply by 12)	
46. If any of the vacant units on lines 26a or b will be reoccupied during the RBY, enter that number times the average number of months during the RBY these units will be reoccupied.	-
47. If any of the occupied units on lines 26a or b will be vacated during the RBY for mod. construction, enter that number times the average number of months during the RBY these units will be vacated.	+
48. Total Unit Months for Vacant Units In Funded Mod. And Under Construction or Funded For Construction In RBY (Add line 45; less line 46; plus line 47)	
49. Total Unit Months of Vacancy in RBY Adjusted for Modernization (Enter line 44 less line 48)	396
50. Vacancy Percentage for RBY Adjusted for Modernization (Divide line 49 by line 40; multiply by 100; and round to nearest whole.)	16 %
51. Average Number of Vacant Units in RBY Adjusted for Modernization (Divide line 49 by 12; round to nearest whole)	33
52. If the result on line 50 is 3% or lower or if the result on line 51 is five or less, then check the appropriate box below. You have completed the form and do not need to proceed further.	
Stop & Note ☐ a. High Occupancy HA: Vacancy Percentage is 3% or less for the RBY after Modernization Adjustment → Use line 41 as the Projected Occupancy Percentage on Part B, line 11 of form HUD-52723	
☐ b. High Occupancy HA: five or fewer vacant units after Modernization Adjustment → Use line 41 for the Projected Occupancy Percentage on Part B, line 11 of form HUD-52723	

This form replaces forms HUD-52728-A thru -C which have been canceled. Previous edition is obsolete.

Part H. Vacancy Percentage for RBY Adjusted for Both Modernization and Beyond Control Circumstances		
53. Total Unit Months of Vacancy in RBY (Enter line 44)		396
54. Total Unit Months of Vacancy in RBY Due to Modernization (Enter line 48)		
55. Total Unit Months of Vacancy in RBY Due to Beyond Control Vacancies (Enter line 21 times 12; less any entry made on line 34c)		
56. Total Unit Months of Vacancy After Above Adjustments (Enter line 53 less lines 54 and 55)		396
57. Vacancy Percentage for RBY After Above Adjustments (Divide line 56 by line 40; multiply by 100; and round to nearest whole.)		16 %
58. Average Number of Vacant Units in RBY After Above Adjustments (Divide line 56 by 12; round to nearest whole)		33
59. If the result on line 57 is 3% or lower or if the result on line 58 is five or less, then check the appropriate box below. You have completed the form and do not need to proceed further.		
Stop & Note	☐ a. High Occupancy HA: Vacancy Percentage is 3% or less for the RBY after Modernization Adjustment ☐ b. High Occupancy HA: five or fewer vacant units after Modernization Adjustment	→ Use line 41 as the Projected Occupancy Percentage on Part B, line 11 of form HUD-52723 → Use line 41 for the Projected Occupancy Percentage on Part B, line 11 of form HUD-52723
Part I. Adjustment for Long Term Vacancies If the HA estimates that it will have a vacancy percentage of more than 3% for its RBY and more than five vacant units after adjusting for vacant units undergoing modernization and vacancies beyond its control, the HA will exclude all of its long-term vacancies (if any) from its count of units available for occupancy and use this section to determine its projected occupancy percentage.		
60. Total Long-term Vacancies (Subtract vacant units shown on lines 21, 28a, and b from line 12. Analyze remaining vacancies and identify those units that have been vacant for more than 12 months as of the Report Date.)		0
61. Unit Months of Vacancy Associated With Long-Term Vacancies (Multiply line 60 by 12)		0
62. Total Unit Months Available for Occupancy in RBY Adjusted for Long-Term Vacancies (Subtract line 61 from line 31(c). Use this UMA number in all other PFS calculations.		2,532
63. Occupancy Percentage for RBY Adjusted for Long-Term Vacancies (Divide line 38(c) by line 62; multiply by 100 and round to nearest whole)		85 %
64. Average Number of Vacant Units in RBY after All Adjustments (Subtract line 60 from line 58)		33
65. Total Unit Months of Vacancy in RBY after All Adjustments (Subtract line 61 from line 56)		396
66. Vacancy Percentage for RBY Adjusted for Long-Term Vacancies (Divide line 65 by line 62; multiply by 100 and round to nearest whole)		16 %
67. If the result on line 63 is 97% or higher or if the result on line 64 is five or less or if the result on line 66 is 3% or less, then check the appropriate box below. You have completed the form and do not need to proceed further.		
Stop & Note	☐ a. High Occupancy HA: Occupancy Percentage is 97% or higher for the RBY after Long-Term Vacancies Adjustment ☐ b. High Occupancy HA: Five or fewer vacant units after Adjustment for Long-Term Vacancies ☐ c. High Occupancy HA: Vacancy Percentage is 3% or lower for the RBY after Long-Term Vacancies Adjustment	→ Use 97% as the Projected Occupancy Percentage on Part B, line 11 of form HUD-52723. Use the UMA result on line 62 in calculating PFS eligibility. → Use line 63 as the Projected Occupancy Percentage on Part B, line 11 of form HUD-52723. Use the UMA result on line 62 in calculating PFS eligibility. → Use line 63 as the Projected Occupancy Percentage on Part B, line 11 of form HUD-52723. Use the UMA result on line 62 in calculating PFS eligibility.
Part J. Projected Occupancy Percentages for Low Occupancy HAs If the HA cannot determine an acceptable Projected Occupancy Percentage for the RBY using the above approach, it will use this section. The HA will use the lower of either 97% or that percentage based on having five units vacant for the RBY. Either percentage can be adjusted for vacant units undergoing modernization construction and vacancies beyond its control. Small HAs of 140 units or less will generally want to use a percentage based on five vacant units.		
68. Enter 97% if HA has more than 140 units. If 140 or fewer units, determine occupancy percentage based on 5 vacant units for RBY. (Take 60 unit months and divide by line 62; multiply by 100 and round to nearest whole. Subtract result from 100%)		97 %
69. Percentage Adjustment for Modernization and Beyond Control Vacancies (Add lines 48 plus 55; divide that sum by line 62; multiply by 100 and round to nearest whole)		0 %
70. Projected Occupancy Percentage for Low Occupancy HA (Take the percentage on line 68 and subtract the percentage shown on line 69. Use the result as the Projected Occupancy Percentage on Part B, line 11 of form HUD-52723. Use the UMA result on line 62 in calculating PFS eligibility)		97 %

Calculation of Allowable Utilities Expense Level

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

OMB Approval No. 2577-0029 (exp. 10/31/2004)

PHA-Owned Rental Housing
Operating Fund

a) Public Housing Agency Santa Fe County Housing Auth.	b) Operating Fund Project Number N M 0 5 0 0 0 1 0 5 J	c) New Project Numbers	d) Fiscal Year Ending <u>06 / 30 / 05</u> e) ACC Number <u>FW-5474</u>	f) Type of Submission: ☒ Original ☐ Revision No. () g) Energy Performance Contract ☐ h) Utility Rate Incentive ☐
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Line No.	Description	Unit Months Available	Sewerage and Water Consumption	Electricity Consumption	Gas Consumption	Fuel (Specify type e.g., oil, coal, wood)		
						(7)	(8)	(9)
01	UMA and actual consumption for old projects for 12 month period which ended 12 months before the Requested Budget Year. <u>03</u>	2,548*	22,238,573	164,513	16,956			
02	UMA and actual consumption for old projects for 12 month period which ended 24 months before the Requested Budget Year. <u>02</u>	2,618**	14,241,360	201,633	16,556			
03	UMA and actual consumption for old projects for 12 month period which ended 36 months before the Requested Budget Year. <u>01</u>	2,652	21,225,304	114,253	19,562			
04	Accumulated UMA and actual consumption of old projects (sum of lines 01, 02, 03).	7,826	57,705,237	480,399	53,074			
05	Estimated Unit Months Available for old projects for Requested Budget Year.	2,609						
06	Ratio of Unit Months Available for old projects (line 04 divided by line 05 of column 3)	3						
07	Estimated UMA and consumption for old projects for Requested Budget Year (Each figure on line 04 divided by line 06).	2,532	19,235,079	160,133	17,691			
08	Estimated UMA and consumption for new projects.							
09	Total estimated UMA and consumption for old and new projects for Requested Budget Year (line 07 + line 08).	2,532	19,235,079	160,133	17,691			
10	Estimated cost of consumption on line 09 for Requested Budget Year (Line 13 times Line 09).	Costs	160,728	11,017	19,641			
11	Total estimated cost for Requested Budget Year (sum of all columns of line 10).	191,386						
12	Est. PUIM cost of consumption for Requested Budget Year (Allowable Utilities Expense Level) (Line 11 divided by line 09, col. 3)	75.59						
13	Rate		.008356	.068801	1.1102			
14	Unit of Consumption		GALLONS	KWH	THERM			

Previous editions are obsolete

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form HUD-52722-A (10/2001)

*Reflects UMAs according to Mandatory Adjustments for FY03.
**Reflects UMAs according to Mandatory Adjustments for FY02.
***See Attached UMA Schedule.

Adjustment for Utility Consumption and Rates

PHA-Owned Rental Housing
Operating Fund

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

OMB Approval No. 2577-0029 (exp. 10/31/2004)

Public reporting burden for this collection of information is estimated to average 1.5 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not collect this information, and you are not required to complete this form, unless it displays a currently valid OMB control number. This information is required by Section 9(a) of the U.S. Housing Act of 1937, as amended, and by 24 CFR Part 990 HUD regulations. HUD makes payments for operation of low-income housing projects to PHAs. The Operating Fund Formula determines the amount of operating subsidy to be paid to PHAs. PHAs provide information on the Allowable Expense Level (AEL), Allowable Utilities Expense Level and Other Costs for the major formula components. HUD reviews the information to determine each PHA's share of the total operating subsidy funds appropriated by Congress each fiscal year. HUD also uses the information as a means of estimating the annual aggregate operating subsidy eligibility of PHAs which serves as the basis for requesting annual appropriations from Congress. Responses to the collection of information are required to obtain a benefit. The information requested does not lend itself to confidentiality.

a) Public Housing Agency Santa Fe County Housing Auth.		b) Operating Fund Project Number N M O S O O O 1 O 3 J		c) Fiscal Year Ending <u>06 / 30 / 03</u> d) ACC Number <u>FW-5474</u>		e) Type of Submission: ☐ Original ☒ Revision No. (<u>1</u>) f) Energy Performance Contract ☐ Mandatory Adjustments g) Utility Rate Incentive ☐	
Line No.	Description	Line Totals	Sewerage and Water Cost and Consumption	Electricity Costs and Consumption	Gas Costs and Consumption	Fuel Costs & Consumption (Specify type e.g., oil, coal, wood)	
	(2)	(3)	(4)	(5)	(6)	(7)	(8)
01	Actual utility costs for the fiscal year for which adjustment is requested.	\$180,650	\$147,885*	\$15,485	\$17,280		
02	Actual consumption for the fiscal year for which adjustment is requested.		12,221,412	129,537	17,827		
03	Actual average rate (line 01 divided by line 02).		.01210	.119541	.969316		
04	Estimated consumption for old and new projects for the fiscal year for which adjustment is requested.		27,336,319**	132,707	24,884		
05	Costs of estimated consumption at average rate (line 03 times line 04; enter total in column 3).	\$370,753	\$330,769	\$15,864	\$24,120		
06	Line 05, column (3) times 0.75; enter the amount in column 3.	\$278,065					
07	Line 01, column (3) times 0.25; enter the amount in column 3.	\$ 45,163					
08	Total utility costs includable in Operating Subsidy Calculation (line 06 plus line 07).	\$323,228					
09	Total estimated cost for the fiscal year for which adjustment is requested (line 11, form HUD-52722-A).	\$224,710				*Garbage costs are excluded **Valle Vista site had a significant change in consumption (estimated vs. actual) due to change in water utility responsibility from HA to Tenant	
10	Utility adjustment (line 08 minus line 09)	\$98,518					

Previous editions are obsolete for PHA fiscal years ending 12/31/99 and after

form HUD-52722-B (10/2001)