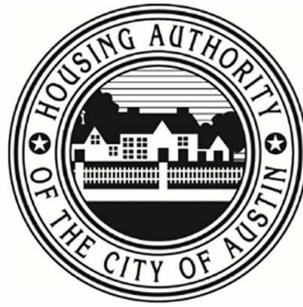


**THE HOUSING AUTHORITY  
OF THE CITY OF AUSTIN**



**BOARD OF COMMISSIONERS**

**Chairperson- Carl S. Richie, Jr.**

**Vice-Chairperson- Dr. Tyra Duncan-Hall**

**2nd Vice-Chairperson- Mary Apostolou**

**Commissioner- Edwina Carrington**

**President & CEO- Michael G. Gerber**

**HOUSING AUTHORITY OF THE CITY OF AUSTIN  
REGULAR BOARD MEETING**

**Thursday, February 19, 2026  
12:00 PM**

**1124 S IH 35, Austin, TX**

Join Zoom Meeting <http://bit.ly/4r9UL0W> Meeting ID: 894 9495 6507 Passcode:  
400017

**PUBLIC NOTICE OF A MEETING  
TAKE NOTICE OF A BOARD OF COMMISSIONERS  
REGULAR MEETING  
OF THE HOUSING AUTHORITY OF THE CITY OF AUSTIN**

**TO BE HELD AT  
1124 S IH 35, Austin, TX  
Join Zoom Meeting <http://bit.ly/4r9UL0W> Meeting ID: 894 9495 6507 Passcode: 400017  
(512.477.4488)**

**Thursday, February 19, 2026  
12:00 PM**

**CALL TO ORDER, ROLL CALL**

**CERTIFICATION OF QUORUM**

**PLEDGE OF ALLEGIANCE**

**PUBLIC COMMUNICATION (NOTE: THERE WILL BE A THREE-MINUTE TIME LIMITATION)**

**CITYWIDE ADVISORY BOARD UPDATE**

**CONSENT AGENDA**

Items on the Consent Agenda may be removed at the request of any Commissioner and considered at another appropriate time on this agenda. Placement on the Consent Agenda does not limit the possibility of any presentation, discussion, or action at this meeting. Under no circumstances does the Consent Agenda alter any requirements under Chapter 551 of the Texas Government Code, Texas Open Meetings Act.

**CONSENT ITEMS**

1. Presentation, Discussion, and Possible Action regarding the Approval of the Board Minutes Summary for the Board Meeting held on January 15, 2026
2. Presentation, Discussion, and Possible Action regarding Resolution No. 02931: Approval of multiple vendor contract for Vacancy Cleaning, Optional painting and repairs
3. Presentation, Discussion, and Possible Action regarding Resolution No. 02934: Approval of multiple Vendor Contracts for Integrated Pest Management at all HACA properties including administration and lease offices

**ACTION ITEMS**

4. Presentation, Discussion and Possible Action regarding Resolution No. 02935: Operating Budgets for the Fiscal Year April 1, 2026 to March 31, 2027
5. Presentation, Discussion, and Possible Action regarding Resolution No. 02936: Approval of the revised Housing Choice Voucher Utility Allowance Schedules
6. Presentation, Discussion, and Possible Action regarding Resolution No. 02937: Approval of renewal of Employee Medical, Dental and Vision Insurance with United Healthcare
7. Presentation, Discussion, and Possible Action regarding Resolution No. 02938: Approval

by the Board of Commissioners of the Housing Authority of the City of Austin (the "Authority") authorizing the Authority to take such actions necessary or convenient to facilitate the development of the Pathways at Santa Rita Courts East (the "Project")

8. Presentation, Discussion, and Possible Action regarding Resolution No. 02939: Approval by the Board of Commissioners of the Housing Authority of the City of Austin (the "Authority") authorizing the Authority to take such actions necessary or convenient to facilitate the development of the Pathways at Santa Rita Courts West (the "Project")

## **EXECUTIVE SESSION**

The Board may go into Executive Session (close its meeting to the public) Pursuant to: a. 551.071, Texas Gov't Code, consultations with Attorney regarding legal advice, pending or contemplated litigation; or a settlement offer; b. 551.072, Texas Gov't Code, discussion about the purchase, exchange, lease or value of real property; c. 551.074, Texas Gov't Code, discuss the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of a public officer or employee; or to hear a complaint or charge against an officer or employee. d. 551.087, Texas Gov't Code, discuss certain economic development negotiations.

## **OPEN SESSION**

If there is an Executive Session, the Board will return to Open Session for discussion, consideration and possible action of matters discussed in Executive Session.

## **REPORTS**

The Board will receive program updates from the President/CEO and other senior staff.

## **ADJOURNMENT**

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"Pursuant to 30.06, Penal Code, (trespass by holder of license with a concealed handgun), a person licensed under Subchapter H, Chapter 411, Government Code (handgun licensing law), may not attend this meeting with a concealed handgun."

"Pursuant to 30.07, Penal Code (trespass by holder of license with an openly carried handgun), a person licensed under Subchapter H, Chapter 411, Government Code (handgun licensing law), may not attend this meeting with a handgun that is carried openly."

"En virtud del 30.06, Código Penal, (traspaso titular de licencia con una pistola), una persona bajo el subcapítulo H, capítulo 411, código de gobierno (Ley de licencia de arma o pistola), no se permiten en este reunión con una arma o pistola.

"En virtud de 30.07, Código Penal (prevaricación por titular de la licencia con un arma o pistola abiertamente llevado), una persona bajo el subcapítulo H, capítulo 411, código de gobierno (Ley de licencia de arma o pistola), no se permiten en esta reunión con un arma o pistola que lleva abiertamente.

\*The Housing Authority of the City of Austin (HACA) Board of Commissioners reserves the right to discuss and consider items out of order on the agenda on an as-needed basis.

The Housing Authority of the City of Austin is committed to compliance with the Americans with Disability Act. Reasonable modifications and equal access to the communications will be provided upon request. Meeting locations are planned with wheelchair access. If requiring Sign Language Interpreters or alternative formats, please give notice at least 2 days (48 hours) before the meeting date. Please call Nidia Hiroms at HACA at 512.477.4488, for additional information; TTYusers route through Relay Texas at 711. For more information on HACA, please contact Nidia Hiroms at 512.477.4488 x 2104.



# HOUSING AUTHORITY OF THE CITY OF AUSTIN

## BOARD ACTION REQUEST

### Executive ITEM 1.

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**MEETING DATE:** February 19, 2026  
**STAFF CONTACT:** Nidia Hiroms  
**ITEM TITLE:** Presentation, Discussion, and Possible Action regarding the Approval of the Board Minutes Summary for the Board Meeting held on January 15, 2026  
**BUDGETED ITEM:** N/A  
**TOTAL COST:** N/A

### ACTION

The Board is being asked to review and approve the Board Minutes Summary for the Board Meeting held on January 15, 2026.

### SUMMARY

**Background:**

**Process:**

**Staff Recommendation:**

### ATTACHMENTS:

20260115 FINAL HACA Minutes Summary

**THE HOUSING AUTHORITY OF THE CITY OF AUSTIN  
BOARD OF COMMISSIONERS  
REGULAR BOARD MEETING**

**January 15, 2026**

**SUMMARY OF MINUTES**

**THE HOUSING AUTHORITY OF THE CITY OF AUSTIN (HACA) BOARD OF COMMISSIONERS REGULAR BOARD MEETING NOTICE WAS POSTED FOR 12:00 NOON ON THURSDAY, JANUARY 15, 2026, AND WAS HELD AT THE HOUSING AUTHORITY OF THE CITY OF AUSTIN, 1124 S. IH 35, AUSTIN, TX AND VIRTUALLY**

**CALL TO ORDER, ROLL CALL, CERTIFICATION OF QUORUM**

Dr. Tyra Duncan-Hall, HACA Vice-Chairperson, called the Board of Commissioners Regular Board Meeting of the Housing Authority of the City of Austin, of January 15, 2026, to order at 12:09 pm. The meeting was held at the Housing Authority of the City of Austin, 1124 S. IH 35, Austin, TX and virtually

Roll call certified a quorum was present on the call.

**MEMBERS PRESENT:**

Carl S. Richie, Jr., Chairperson (arrived at 12:30 pm)  
Dr. Tyra Duncan-Hall, Vice-Chairperson  
Mary Apostolou, 2<sup>nd</sup> Vice-Chairperson  
Edwina Carrington, Commissioner

**MEMBER(S) ABSENT:**

**ALSO IN ATTENDANCE:**

Bill Walter, Coats Rose  
Lauren Aldredge, Cokinos Law Firm

**STAFF PRESENT:**

Ann Gass, Barbara Chen, Gloria Morgan, Jorge Vazquez, Katie Richardson, Kelly Crawford, Ken Bodden, Laura Bodai, Leilani Lim-Villegas, Michael Gerber, Michael Roth, Nidia Hiroms, Ron Kowal, Suzanne Schwertner, Sylvia Calderon and Tiffany Tobler

**PUBLIC COMMUNICATION – None.**

**Keith Swenson**, HACA Deputy Director of TMI, a longtime member of the HACA technology management team was remembered by the Board and staff. **Keith** passed away from pancreatic cancer recently.

**CITYWIDE ADVISORY BOARD (CWAB) –** ●**Lupe Garcia**, Citywide Advisory Board President, reported that the October CWAB Meeting was held on Tuesday, January 13, 2025. ●**Michael Roth**, Vice-President of PAMI, congratulated Gaston staff and residents on their TDHCA Inspection which received a 98% score. ●**Michael** advised residents that washing machines on property will be replaced by February. ●**Michael Gerber**, HACA President & CEO welcomed all residents participating in the CWAB Meeting through their community rooms. ●**Mike** announced the passing of **Bob Kafka** with ADAPT. **Bob** was a voice for disability rights for over 40 years, and a very good friend of HACA. ●**Mike** thanked **Lupe Garcia** for her advocacy and leadership during the Santa Rita relocation. He reported that all families have moved out of Santa Rita. ●**Leilani Lim-Villegas**, HACA Senior Director of Community Development, announced that HACA will be closed on Monday, January 19th in observance of Martin Luther King holiday. All resident councils are receiving their new annual budgets beginning on January 1, 2026. This year's Mayfest will be on Friday, May 13. The theme is Texas Western. ●**Dominique Green**, HACA Youth Education and FSS Manager announced Scholarship opportunities are being shared on the One Voice Newsletter. The HACA scholarship deadline is March 20th. Please check the HACA website for other scholarship opportunities. ●**John Espnosa**, Workforce Development and Digital Inclusion Manager, reported that GED classes are being provided at Chalmers and Georgian Manor. Enrollment is still open. We are onboarding the new Spring ACC interns. ●**Borami Lee**, HACA Bringing Health Home Manager, reported that Austin Pathways is hosting Valentine's Day themed classes focused on Healthy Relationship, provided by Austin Public Health. ●**Daniel Ruiz**, HACA Family Opportunity Manager, reported that Austin Pathways is excited to celebrate our HACA first-time homeowners who are scheduled to receive the keys to their new home at Prospect Heights in February. ●**Gaston Resident Council** shared the sad news that their President, Alice Merida, passed away. Please keep Alice and her family in your thoughts and prayers.

## CONSENT ITEMS

### APPROVAL OF THE FOLLOWING ITEMS PRESENTED IN THE BOARD MATERIALS

**ITEM 1: Presentation, Discussion, and Possible Action regarding the Approval of the Board Minutes Summary for the Board Meeting held on December 18, 2025**

2<sup>nd</sup> Vice-Chairperson Apostolou moved the Approval of the Board Minutes Summary for the Board Meeting held on November 13, 2025. Vice-Chairperson Duncan-Hall seconded the motion. The motion Passed (4-Ayes and 0-Nays).

**ITEM 2: Presentation, Discussion, and Possible Action regarding Resolution No. 02931: Approval of Vacancy Cleaning & Optional Painting and Repairs**

THIS ITEM WAS TABLED AND WILL BE PRESENTED AT THE HACA FEBRUARY BOARD MEETING.

**ITEM 3: Presentation and Discussion, and Possible Action Regarding Resolution No. 02934: Approval of a contract for Agency wide pest control**

THIS ITEM WAS TABLED AND WILL BE PRESENTED AT THE HACA FEBRUARY BOARD MEETING.

## ACTION ITEMS

### APPROVAL OF THE FOLLOWING ITEMS PRESENTED IN THE BOARD MATERIALS

**ITEM 4: Presentation, Discussion, and Possible Action on Resolution No. 02932: by the Board of Commissioners of the Housing Authority of the City of Austin (the "Authority") to take the following actions with regard to the Cascades at Onion Creek (the "Development") in Austin, Texas: (i) acquire the site of the Development; (ii) lease the Development site to the owner of the Development; and (iii) such other actions necessary or convenient to carry out this resolution**

Austin Affordable Housing Corporation (AAHC) was presented with an opportunity for a new partnership with Cadence Multifamily on a 358-unit multi-family rental property called Cascades at Onion Creek Apartments. The development is located at 2213 Cascades Avenue, Austin, Texas 78747. This is a Class A garden-style multifamily community located within a 200-acre master-planned development in South Central Austin. Cadence Multifamily, led by Bob Ruggio and Curtis Davidson, is an Austin-based multifamily development group with properties located throughout the state of Texas. The group's target markets have traditionally been situated along the I-35 corridor in the cities of Austin, San Antonio, and San Marcos. In 2020, the team developed and currently operates the 264-unit affordable apartment complex (4% LIHTC), Aspire at Onion Creek, located adjacent to the Subject property.

Robert "Bob" Ruggio is a 25-year real estate industry veteran with a background in construction, land acquisition, marketing, and sales. He has worked for some of the nation's largest homebuilders, including Ryland Homes, Toll Brothers, and Capital Pacific Homes, where he served as Vice President of Sales and Marketing and Land Acquisition. During a 3-year period at CPH, Bob was directly involved with acquiring and developing over 1,000 home sites and over 960 home sales. Since joining Cadence in 2009, Bob has overseen many successful ventures, including several multifamily projects: 186-unit Blanco River Lodge in San Marcos, 168-unit The Ridge at Headwaters in Austin, 151-unit ArborView Circle C Ranch (62+) in Austin, and 264-unit Aspire at Onion Creek in Austin. Curtis Davidson has over 30 years of combined residential and commercial real estate experience. Curtis moved to Austin in 1993 to take the CFO position with a new startup homebuilding company called Clark Wilson Homes. In a two-year time frame, the company became one of the top ten homebuilders in the Austin Market. In 1994, Curtis started and operated a mortgage operation named Fairway Financial Corporation. In late 1994, Clark Wilson Homes and Fairway Financial Corporation were sold to Capital Pacific Homes. Curtis started a commercial division for Capital Pacific Holdings in February of 2000, named Makar Properties. In early 2001, the new commercial division purchased a 1,600-acre tract of land in Northern Hays County, Tx. Curtis had the overall responsibility to purchase, entitle, develop, and construct the 2,000 homes in the flagship Master Planned Community known as Belterra. In 2007, Curtis established Cadence Development. Over the next few years, Cadence Development developed and managed multiple residential developments that included a 15-acre, 246-unit, single-family development with trails, open space and an amenity center located in San Antonio, Texas. All lots were sold to regional or national homebuilders. Curtis developed a 36-acre infill project located in Austin, Texas, called Lake Creek. Lake Creek included 90 single-family lots and 60 multifamily units. He also managed the planning and entitlement of Stonehill, a 568-acre, 1,950-unit master planned community located in San Antonio, Texas, that includes multifamily and a small retail component.

Flournoy Properties Group currently manages Cascades. They are a boutique apartment management company based in Columbus, Georgia that specializes in high-quality multifamily properties in the Southeast and Texas. Their Texas portfolio is entirely in the Austin-Round Rock-San Marcos MSA. Their culture emphasizes trust, accountability, and excellence. They focus on collaboration, communication, and consistency to create exceptional experiences for residents. With over 55 years of experience, Flournoy's team excels in multifamily management across the Southeast, MidAtlantic, and Midwest. Cascades at Onion Creek Apartments was completed in 2024 and is currently in lease up. The property consists of two adjacent tracts (Phase I and Phase II) that are bisected by Mayall Trail and operate as a single multifamily complex. Phase I is located along the north side of Mayall Trail, is approximately 15.34 acres in size, and consists of 250 apartment units in 10 residential buildings, a clubhouse/leasing office building, and a maintenance building. Phase II is located along the south side of Mayall Trail, is approximately 11.47 acres in size, and consists of 108 apartment units in 3 residential buildings. The property is conveniently

within 3 miles of the following Austin ISD education facilities: Blazier Elementary School, Blazier Intermediate School, Paredes Middle School, and Akins High School.

AAHC and Cadence Multifamily are committed to providing 10% of the affordable units at 60% AMI and 41% of the units below 80% AMI. U.S. Department of Housing and Urban Development (HUD) financing was used to construct the property. The proposed financing will also be a HUD loan via the 223(f) Refinance program. The financing will provide the asset with a fully amortizing and fixed interest rate over a 35-year (420-month) term. Mason Joseph, a current AAHC partner, handled the construction loan and will also act as lender on the refinance loan.

**Commissioner Carrington** moved the Approval of Resolution No. 02932: by the Board of Commissioners of the Housing Authority of the City of Austin (the “Authority”) to take the following actions with regard to the Cascades at Onion Creek (the “Development”) in Austin, Texas: (i) acquire the site of the Development; (ii) lease the Development site to the owner of the Development; and (iii) such other actions necessary or convenient to carry out this resolution. **2<sup>nd</sup> Vice-Chairperson Apostolou** seconded the motion. The motion Passed (4-Ayes and 0-Nays).

**ITEM 5: Presentation, Discussion, and Possible Action regarding Resolution No: 02933: Approval of revision to the HACA's Retirement plan to add the IRS age 59½ withdrawal provision to its plan**

THIS ITEM WAS TABLED INDEFINITELY.

## REPORTS

**Ann Gass**, HACA Director of Strategic Housing Initiatives gave an update on the Santa Rita and Rosewood properties.

**Barbara Chen**, HACA CFO gave an update on the current Budget.

**Laura Bodai**, HACA VP of Assisted Housing gave an update on the Housing Choice Voucher shortfall.

**Mike Gerber**, HACA President and CEO reported that the National Association of Redevelopment Officials (NAHRO) is working on a research and redevelopment policy for public housing and affordable housing.

After some discussion from the Board, **Vice-Chairperson Duncan-Hall** moved the approval of a one-time \$100K to the National Association of Redevelopment Officials (NAHRO) to support education, research and policy development initiatives for the broader public housing and affordable housing industries. The board has determined that this is an appropriate use of funds given current national and statewide concerns regarding public housing, affordable housing, community development, and the critical services which support very low-income people. Because HACA has always been a housing authority demonstrating statewide and national leadership, the board felt it was appropriate to make this one time contribution given our long time engagement with and commitment to NAHRO, and because NAHRO is developing an array of new strategies to advance the interest of public housing authorities and to further protect the low income clients and residents we serve.

It is expected that these funds will be matched by other housing authorities and other organizations around the country. Further, this is a one-time contribution to NAHRO and no further sponsorship funds will be awarded to NAHRO in 2026. **2<sup>nd</sup> Vice-Chairperson Apostolou** seconded the motion. The motion Passed (4-Ayes and 0-Nays).

**Michael Gerber**, HACA President and CEO announced that the March HACA Annual Board Meeting has been moved to Tuesday, March 17<sup>th</sup> due to scheduling conflicts. The April meeting has been cancelled.

**Chairperson Richie left the meeting at 2:51 pm.**

## EXECUTIVE SESSION

The Board did not recess into Executive Session.

**Commissioner Carrington** moved to adjourn the meeting. **2<sup>nd</sup> Vice-Chairperson Apostolou** seconded the motion. The motion Passed (3-Ayes and 0-Nays).

The meeting adjourned at 3:17 pm.

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**Michael G. Gerber, Secretary**

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**Chairperson**



# HOUSING AUTHORITY OF THE CITY OF AUSTIN

## BOARD ACTION REQUEST

### Operations ITEM 2.

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**MEETING DATE:** February 19, 2026  
**STAFF CONTACT:** Nora Velasco  
**ITEM TITLE:** Presentation, Discussion, and Possible Action regarding Resolution No. 02931: Approval of multiple vendor contract for Vacancy Cleaning, Optional painting and repairs  
**BUDGETED ITEM:** **Yes**  
**TOTAL COST:** **TOTAL COST \$ 232,900.00**

### ACTION

The Board is being asked to authorize the award of multiple contracts to provide Make-Ready Services, Optional Painting, and turn key maintenance services at all HACA properties to the following vendors: We Do It All LLC, Trevino Contractor, Corza Construction, Davis Moving and Cleaning, and Unity Construction.

Each vendor has established fixed prices on open-end contracts. The total amount budgeted for this service is \$232,900.

### SUMMARY

#### Background:

The Housing Authority of the City of Austin utilizes the services of contractors to perform cleaning with optional painting and general maintenance tasks for its vacancy units. This helps ensure timely completion of unit make readies in order to lease units to new families in a timely and efficient manner.

Every year PAMI averages over 250 vacated units. Last year, PAMI turned 271 vacant units (excluding Pathways at Santa Rita Courts), which represents 18.13% of the units in its portfolio. Awarding four (4) cleaning; three (3) Painting; and four (4) General maintenance contracts will efficiently keep up with the demand of turning the vacated units quickly.

#### Process:

On October 1, 2025, HACA issued a Request for Proposals (RFP) for Vacancy Cleaning Optional Painting & Repairs PAMI-25-P-058. The RFP was advertised in the Austin American Statesman (10/05/25) and (10/12/25), on HACA'S website , and on the online bidding service Housing Agency Marketplace. 347 vendors were notified, 43 vendors downloaded the proposal

and eight responses were received.

**Staff Recommendation:**

After completing this evaluation, staff recommends the approval to award multiple contracts based on PAMI needs to establish a pool of contractors available to all properties. This will offer PAMI additional options during times of simultaneous accumulated vacancies across the housing portfolio. The recommended contractors — We Do It All LLC, Trevino Contractor, Corza Construction, Davis Moving and Cleaning, and Unity Construction — meet qualification requirements and have acceptable experience as noted via proposals and/or current vendor performance.

**ATTACHMENTS:**

TABULATION 0258, BIDDERS.QUALIFICATIONS.WE.DO.IT.ALL,  
BIDDERS.QUALIFICATIONS.DAVIS.MOVING.CLEANNING,  
BIDDERS.QUALIFICATIONS.UNITY.CONTRACTORS,  
BIDDERS.QUALIFICATIONS.TREVINO.CONTRACTORS,  
BIDDERS.QUALIFICATIONS.CORZA.CONSTRUCTION, TABULATION 0258f.hdhl,  
TABULATION 0258m.roth, TABULATION 0258c.james, TABULATION 0258f.garcia

**RESOLUTION NO. 02931**

**Approval of multiple vendor contracts for Vacancy Cleaning, Optional painting and repairs**

**WHEREAS**, the Housing Authority of the City of Austin (HACA) issued a request for proposal PAMI-25-P-0258 for Vacancy Cleaning, Optional Painting Services, and Repairs on October 1, 2025; and

**WHEREAS**, HACA reserves the right to award multiple contracts to create a pool of vendors to better meet the needs of each property; and

**WHEREAS**, it is the recommendation to award contracts based on each bidder's submitted pricing as follows:

<b>Lot 1-Make-Ready Cleaning</b>	<b>Lot 2- Optional Painting</b>	<b>LOT-3 General Maintenance Repairs</b>
Davis Moving & Cleaning	Trevino Contractor	We Do It All, LLC
We Do It All	Corza Construction	Unity Contractor
Trevino Contractor	Davis Moving & Cleaning	Corza Construction
Corza Construction		Davis Moving & Clean

**WHEREAS**, each vendor’s performance will be reviewed annually and renewed not to exceed five years;

**NOW, THEREFORE, IT IS HEREBY RESOLVED**, that the Housing Authority of the City of Austin Board of Commissioners authorizes the President & CEO to accept the proposals as submitted and recommended by staff and award such contracts not to exceed the overall amount of \$232,900.

**PASSED, APPROVED AND ADOPTED** this 19th day of February, 2026.

\_\_\_\_\_  
Michael G. Gerber, Secretary

\_\_\_\_\_  
Carl S. Richie, Jr., Chairperson

**LOT 1 VACANCY CLEANING**

	Corza Construction			Davis Moving and Cleaning			We Do It All LLC.			Unity Contractor			Trevino Contractor			M&B Construction			M & R Elite			Stellar Builders		
	LVT FLOOR	VCT TILE	CERAMIC	LVT FLOOR	VCT TILE	CERAMIC	LVT FLOOR	VCT TILE	CERAMIC	LVT FLOOR	VCT TILE	CERAMIC	LVT FLOOR	VCT TILE	CERAMIC	LVT FLOOR	VCT TILE	CERAMIC	LVT FLOOR	VCT TILE	CERAMIC	LVT FLOOR	VCT TILE	CERAMIC
eff	\$176.00	\$208.00	\$192.00	\$255.00	\$375.00	\$255.00	\$125.00	\$125.00	\$125.00	\$1,800.00	\$1,800.00	\$1,800.00	\$450.00	\$420.00	\$440.00	\$2.30	\$2.40	\$2.50	\$130.00	\$155.00	\$130.00			
1 1	\$330.00	\$390.00	\$360.00	\$275.00	\$400.00	\$275.00	\$150.00	\$150.00	\$150.00	\$2,350.00	\$2,350.00	\$2,350.00	\$480.00	\$450.00	\$470.00	\$1.75	\$1.85	\$1.95	\$155.00	\$175.00	\$155.00			Not included
2 1	\$462.00	\$546.00	\$504.00	\$295.00	\$425.00	\$295.00	\$250.00	\$250.00	\$250.00	\$3,800.00	\$3,800.00	\$3,800.00	\$510.00	\$480.00	\$500.00	\$1.50	\$1.60	\$1.75	\$165.00	\$180.00	\$165.00			In packet
2 1.5	\$467.50	\$552.50	\$510.00	\$315.00	\$450.00	\$315.00	\$250.00	\$250.00	\$250.00	\$3,825.00	\$3,825.00	\$3,825.00	\$540.00	\$500.00	\$520.00	\$1.50	\$1.60	\$1.75	\$166.00	\$185.00	\$166.00			
2 2	\$470.25	\$555.75	\$513.00	\$335.00	\$475.00	\$335.00	\$250.00	\$250.00	\$250.00	\$3,850.00	\$3,850.00	\$3,850.00	\$580.00	\$520.00	\$540.00	\$1.50	\$1.60	\$1.70	\$167.00	\$225.00	\$167.00			
3 1	\$596.75	\$705.25	\$651.00	\$355.00	\$500.00	\$355.00	\$350.00	\$350.00	\$350.00	\$3,895.00	\$3,895.00	\$3,895.00	\$610.00	\$540.00	\$560.00	\$1.30	\$1.40	\$1.50	\$180.00	\$240.00	\$180.00			
3 1.5	\$596.75	\$705.25	\$651.00	\$375.00	\$525.00	\$375.00	\$350.00	\$350.00	\$350.00	\$3,895.00	\$3,895.00	\$3,895.00	\$640.00	\$560.00	\$580.00	\$1.30	\$1.40	\$1.50	\$190.00	\$245.00	\$190.00			
3 2	\$596.75	\$705.25	\$651.00	\$395.00	\$550.00	\$395.00	\$350.00	\$350.00	\$350.00	\$3,910.00	\$3,910.00	\$3,910.00	\$680.00	\$580.00	\$600.00	\$1.30	\$1.40	\$1.50	\$195.00	\$275.00	\$195.00			
4 1	\$742.50	\$877.50	\$810.00	\$415.00	\$575.00	\$415.00	\$425.00	\$425.00	\$425.00	\$5,300.00	\$5,300.00	\$5,300.00	\$710.00	\$620.00	\$640.00	\$1.25	\$1.35	\$1.45	\$210.00	\$300.00	\$210.00			
4 1.5	\$742.50	\$877.50	\$810.00	\$435.00	\$600.00	\$435.00	\$425.00	\$425.00	\$425.00	\$5,325.00	\$5,325.00	\$5,325.00	\$740.00	\$640.00	\$660.00	\$1.25	\$1.35	\$1.45	\$210.00	\$300.00	\$210.00			
4 2	\$742.50	\$877.50	\$810.00	\$455.00	\$625.00	\$455.00	\$425.00	\$425.00	\$425.00	\$5,375.00	\$5,375.00	\$5,375.00	\$780.00	\$660.00	\$680.00	\$1.25	\$1.35	\$1.45	\$220.00	\$300.00	\$220.00			
5 1.5	\$825.00	\$975.00	\$900.00	\$475.00	\$650.00	\$475.00	\$500.00	\$500.00	\$500.00	\$5,450.00	\$5,450.00	\$5,450.00	\$810.00	\$680.00	\$700.00	\$1.20	\$1.30	\$1.40	\$235.00	\$325.00	\$235.00			
5 2	\$825.00	\$975.00	\$900.00	\$495.00	\$675.00	\$495.00	\$500.00	\$500.00	\$500.00	\$5,500.00	\$5,500.00	\$5,500.00	\$840.00	\$700.00	\$720.00	\$1.20	\$1.30	\$1.40	\$245.00	\$325.00	\$245.00			
ARPI	15%			2%			2%			2%			7%			5%			2%					

**LOT 2 PAINTING**

	Corza Construction		Davis Mov. & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor		M&B Construction		M&R Elite		Stellar Builders	
	ONE COLOR	TWO COLOR	ONE COLOR	TWO COLOR	ONE COLOR	TWO COLOR	ONE COLOR	TWO COLOR	ONE COLOR	TWO COLOR	ONE COLOR	TWO COLOR	ONE COLOR	TWO COLOR	ONE COLOR	TWO COLOR
eff	\$400.00	\$480.00	\$205.00	\$255.00	\$1,100.00	\$1,250.00	\$1,985.00	\$1,985.00	\$580.00	\$600.00	\$2.25	\$2.75	No Bid			Not included
1 1	\$750.00	\$900.00	\$255.00	\$305.00	\$1,200.00	\$1,350.00	\$1,995.00	\$1,995.00	\$650.00	\$690.00	\$2.25	\$2.75				In Packet
2 1	\$1,050.00	\$1,260.00	\$305.00	\$355.00	\$1,400.00	\$1,550.00	\$1,995.00	\$1,995.00	\$690.00	\$730.00	\$2.25	\$2.75				
2 1.5	\$1,062.50	\$1,275.00	\$355.00	\$405.00	\$1,400.00	\$1,550.00	\$1,995.00	\$1,995.00	\$710.00	\$770.00	\$2.25	\$2.75				
2 2	\$1,068.75	\$1,282.50	\$405.00	\$455.00	\$1,400.00	\$1,550.00	\$1,995.00	\$1,995.00	\$720.00	\$810.00	\$2.25	\$2.75				
3 1	\$1,356.25	\$1,627.50	\$455.00	\$505.00	\$1,600.00	\$1,750.00	\$2,850.00	\$2,850.00	\$780.00	\$850.00	\$2.15	\$2.60				
3 1.5	\$1,356.25	\$1,627.50	\$505.00	\$555.00	\$1,600.00	\$1,750.00	\$2,850.00	\$2,850.00	\$800.00	\$890.00	\$2.15	\$2.60				
3 2	\$1,356.25	\$1,627.50	\$555.00	\$605.00	\$1,600.00	\$1,750.00	\$2,875.00	\$2,875.00	\$820.00	\$930.00	\$2.15	\$2.60				
4 1	\$1,687.50	\$2,025.00	\$605.00	\$655.00	\$1,800.00	\$1,950.00	\$3,800.00	\$3,800.00	\$860.00	\$970.00	\$2.10	\$2.50				
4 1.5	\$1,687.50	\$2,025.00	\$655.00	\$705.00	\$1,800.00	\$1,950.00	\$3,850.00	\$3,850.00	\$880.00	\$1,010.00	\$2.10	\$2.50				
4 2	\$1,687.50	\$2,025.00	\$705.00	\$755.00	\$1,800.00	\$1,950.00	\$3,900.00	\$3,900.00	\$900.00	\$1,050.00	\$2.10	\$2.50				
5 1.5	\$1,875.00	\$2,250.00	\$755.00	\$805.00	\$1,950.00	\$2,100.00	\$4,200.00	\$4,200.00	\$920.00	\$1,090.00	\$2.05	\$2.45				
5 2	\$1,875.00	\$2,250.00	\$805.00	\$855.00	\$1,950.00	\$2,100.00	\$4,225.00	\$4,225.00	\$940.00	\$1,130.00	\$2.05	\$2.45				
ARPI	15%		2%		2%		2%		7%		5%					

**LOT 3 OTHER SERVICES GENERAL MAINT**

	Corza	Davis	We Do It All	Unity Con.	Trevino Con.	M&B Cons.	M&R Elite	Stellar Builders
eff	\$55.00	\$125.00	\$65.00	\$92.00	\$180.00	\$80.00	No Bid	Not Included
1 1	\$55.00	\$125.00	\$65.00	\$92.00	\$200.00	\$80.00		In packet
2 1	\$55.00	\$125.00	\$65.00	\$92.00	\$220.00	\$80.00		
2 1.5	\$55.00	\$125.00	\$65.00	\$92.00	\$240.00	\$80.00		
2 2	\$55.00	\$125.00	\$65.00	\$92.00	\$260.00	\$80.00		
3 1	\$55.00	\$125.00	\$65.00	\$92.00	\$280.00	\$80.00		
3 1.5	\$55.00	\$125.00	\$65.00	\$92.00	\$300.00	\$80.00		
3 2	\$55.00	\$125.00	\$65.00	\$92.00	\$320.00	\$80.00		
4 1	\$55.00	\$125.00	\$65.00	\$92.00	\$340.00	\$80.00		
4 1.5	\$55.00	\$125.00	\$65.00	\$92.00	\$360.00	\$80.00		
4 2	\$55.00	\$125.00	\$65.00	\$92.00	\$380.00	\$80.00		
5 1.5	\$55.00	\$125.00	\$65.00	\$92.00	\$400.00	\$80.00		
5 2	\$55.00	\$125.00	\$65.00	\$92.00	\$420.00	\$80.00		
ARPI	15%	2%	4%	2%	7%	5%		

## STATEMENT OF BIDDER'S QUALIFICATIONS

1. Name of Bidder.

**Latania Fenn**

2. Permanent main office address.

**3206 Spaniel Drive  
Austin, TX 78759**

3. When organized.

**September 08, 2023**

4. State whether bidder is a Corporation, Partnership, or Sole Proprietor.

**Corporation**

5. If "Corporation", date and State of Incorporation.

**September 08, 2023, State of Texas**

6. A Breakdown of the minority ownership of the business (Gender, White, Black, Hispanic, American Hispanic, American Indian/Eskimo, Asian/Pacific Islander, etc.) Who owns what percent of the business, and any other related information.

**100% Black Owned, by Latania Fenn**

7. Number of years engaged in contracting business under present name.

**2 years and 1 month**

8. Contract in progress (gross amounts of contracts, estimated completion dated, project owner, architect).

**Pathways at North Loop  
2300 W North Loop Blvd.  
Austin, TX 78756  
512-834-9705**

9. General character of work performed by your company.

**Cleaning, painting and general contracting services with a focus on preparing units for move-in-readiness. We take pride in detailed, high-quality work and ensure every project meets customer satisfaction.**

10. Report on any failures to complete work awarded to you (where, when & why). Report any contracts you have defaulted on.

**None**

11. Name & address of bonding company and name and address of agent.

**N/A**

12. List of three (3) currently completed projects, including name, address, phone number, and type of work.

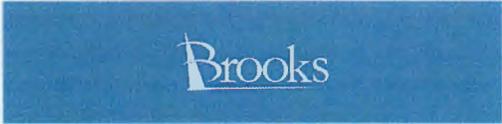
- Pathways at Thurmond Heights – 8426 Goldfinch Ct, Austin, TX 78758 – (512) 835-1816
- Pathways at Northgate Blue – 9120 Northgate Blvd, Austin, TX 78758 – (512) 834-9705
- Pathways at Coronado Hills – 1438 Coronado Hills Dr, Austin, TX 78752 – (512) 317-3919

13. List any previous contacts, including dated executed with HACA.

**Currently a vendor for HACA (Housing Authority of the City of Austin)**

## Qualifications and Experience

### Brooks City Base



Brooks

- **Description:** Davis Moving and Cleaning provides general maintenance and cleaning services (7 days/week) for 4 facilities and Greenline park. Services include stripping/waxing, pressure washing, painting, carpet cleaning, biohazard cleaning, and event cleaning support. Davis Moving and Cleaning provided event cleaning services for Fiesta with Brooks City Base with over 6,000 attendees at the event.

**Location:** San Antonio, Texas

#### **Roles & Key Personnel:**

- Project Manager: Jason Clayborne
- Supervisors: Alyssa Lopez, Marlin Loggins and Joseph Zimmerlie.
- Custodial Crew: Samantha Garza, Michelle Castillo, Rebecca Reese.
- **Contract Value:** \$279,891.00
- **Painting Services Completed:** \$22,092.17
- **Client Contact:**
  - James LeBlanc, Facility Manager
  - 7515 Inner Circle Dr, San Antonio, Texas, 78235
  - Email: James@Livebrooks.com
  - Phone: (210) 238-0242

### City of Bandera

- **Description:** Delivered janitorial services for municipal buildings, including City Hall and Public Works, providing weekly cleaning, trash removal, and facility sanitation.
- **Location:** Bandera, Texas
- **Roles & Key Personnel:**
  - Project Manager: Torre Davis
  - Custodial Supervisor assigned for routine oversight
- **Contract Value:** \$28,080.00
- **Client Contact:**
  - Allyson Wright, Treasurer
  - 511 Main St, Bandera, Texas, 78003
  - Email: Allyson.wright@banderatx.gov
  - Phone: (830) 522-3189

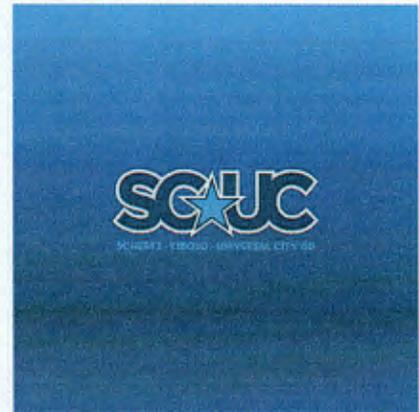


### Qualifications and Experience

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#### 3. Schertz-Cibolo-Universal City Independent School District (SCUC ISD)

- **Description:** Performed stadium cleaning services and pressure washing for athletic facilities. Services included trash and debris removal, bleacher sanitation, restroom cleaning, and exterior surface washing after large-scale sporting events and school functions.
- **Location:** Schertz, Texas
- **Roles & Key Personnel:**
  - Site Supervisor: Marc Jarvis & Marlin Loggins
  - Custodial Team assigned per event schedule
- **Contract Value:** \$ 30,375
- **Client Contact:**
  - Mary Freeman, Executive Secretary – Maintenance & Facilities
  - 1060 Elbel Road, Schertz, Texas, 78154
  - Email: [Mfreeman@scucisd.org](mailto:Mfreeman@scucisd.org)
  - Phone: (210) 945-6206



### Additional Municipalities We Work With

#### 1. City of Liberty Hill:

- **Scope:** Green cleaning services aligned with environmentally sustainable practices.
- **Duration:** Ongoing. Start Date: December 2023
- **Department:** Partnership with municipal offices to maintain public facilities.
- **Results:** Enhanced the city's commitment to sustainability by delivering eco-friendly cleaning services while maintaining high standards of cleanliness.



#### 2. Metro Health Department (San Antonio):

- **Scope:** Emergency relocation services.
- **Duration:** Ongoing. Start Date: January 2024
- **Department:** San Antonio Metro Health Department.
- **Results:** Provided efficient and professional support during critical health-related emergencies, ensuring safe and sanitary conditions.



#### 3. Northside Independent School District:

- **Scope:** Comprehensive moving services across multiple school facilities.
- **Duration:** Ongoing. Start Date: November 2024.
- **Department:** Northside ISD Facilities Department.
- **Results:** Successfully coordinated and executed efficient moves with minimal disruption to school operations, showcasing our ability to manage large-scale public entity projects.



#### 4. Opportunity Home San Antonio:

- **Scope:** Moving services for the housing authority, assisting with relocations and transitions.
- **Duration:** Ongoing
- **Department:** Opportunity Home San Antonio.
- **Results:** Delivered reliable and timely relocation services, ensuring smooth transitions for residents and compliance with housing authority standards.



### Additional Municipalities We Work With

5. **Rockdale Municipal Development District:**

- **Scope:** Janitorial services for public facilities within the district.
- **Duration:** Ongoing.
- **Department:** Rockdale Municipal Development District.
- **Results:** Maintained clean, well-kept facilities that enhance public use and reflect positively on the district.



6. **Austin Independent School District:**

- **Scope:** Carpet Cleaning services for rugs and facilities within the district.
- **Duration:** Ongoing.
- **Department:** AISD Procurement.
- **Results:** Cleaned over 205 rugs and as needed carpet cleaning services for facilities.



7. **San Antonio Water Systems:**

- **Scope:** Facility Moving Services.
- **Duration:** Ongoing.
- **Department:** SAWS Procurement.
- **Results:** Provided moving services and IT moving services.



8. **University Health Systems:**

- **Scope:** Facility Moving Services.
- **Duration:** Ongoing.
- **Department:** UHS Procurement.
- **Results:** Provided moving services and modular furniture moving.



And more!



### Staffing and Oversight Plan

To ensure the successful execution of the janitorial scope of work, **Davis Moving & Cleaning** will staff the project as follows:

- **1 Project Manager:**  
Conducts weekly inspections to verify service quality, ensure compliance with standards, provide ongoing oversight, and address client feedback promptly.
  - **1 On-Site Supervisor (Daily):**  
Oversees daily operations, maintains service quality, manages staff scheduling, verifies attendance, and ensures all team members are properly assigned and equipped for their shifts.
  - **6 Full-Time Cleaners**  
Perform all cleaning tasks including restroom sanitization, floor care, trash removal, and routine custodial duties to restore the facility to optimal condition for the following day. Responsible for nightly cleaning services at 185-GSA (M-F) from 5:30pm – 7:00am.
  - **3 Part-Time Cleaners (As Needed):**  
Provide coverage for unscheduled absences, emergency cleanings, or supplemental support during periods of increased workload.
  - **2 Painters (As Needed):** Provide comprehensive painting services including surface preparation, wall patching, and filling of holes or cracks to ensure a smooth, even finish. All areas not designated for painting — such as cabinets, fixtures, flooring, and furniture — shall be properly covered and protected using drop cloths, plastic sheeting, or painter's tape..
-

## Approach and Coordination with Port San Antonio Staff

Davis Moving & Cleaning's strategy for providing vacancy cleaning and painting services for PAMI is built around flexibility, collaboration, and transparency, ensuring that we meet the operational needs of both PAMI and its staff. Our team will work closely with PAMI management to provide a seamless experience.

- **Dedicated Personnel:** We will have six full-time cleaners, and three part-time cleaners to manage the specific needs of PAMI.
  - The cleaners will report to the designated site Monday through Friday from 8:00am – 5:00pm, or as needed depending on PAMI's needs.
  - The three **part-time cleaners** will be responsible for providing additional cleaning support when needed or covering expected or unexpected absences.
- **Backup Coverage Plan:** In the event a cleaner cannot fulfill their shift, they are required to notify the Shift Supervisor. The Supervisor will then contact the on-call cleaner designated for PAMI. In cases where a cleaner is unavailable, the **Shift Supervisor** will either cover the shift, or source temporary coverage by augmenting staff from Davis Moving & Cleaning's other operations, ensuring no gap in service. The Supervisor will have access to a pool of trained, qualified cleaners across our other contracts and services. These personnel can be deployed on short notice to cover any absence, minimizing disruption.
- **Staff Coordination:** We will establish clear communication lines with PAMI staff, ensuring any specific cleaning needs or requests are addressed promptly. We will adjust our cleaning schedule to avoid high-traffic times and accommodate tenants' operational hours, maintaining flexibility for emergency services if required.

## 2. Strategic Plan for Scheduling Weekly Services

### Coordination and Scheduling:

- PAMI will email unit details (location, size, flooring type, and scope).
  - DMC's Site Supervisor will confirm receipt and start date within 24 hours of notification.
  - Work hours: Monday–Friday, 8:00 AM – 5:00 PM (extended hours available upon written approval).
  - Supervisor is available daily to receive new requests, assign crews, and track progress.
  - Upon completion, DMC will notify the onsite manager for inspection and sign-off.
  - Keys will be signed out daily, properly secured, and returned upon job completion.
-

## 2. Strategic Plan for Scheduling Weekly Services

- **Vacancy Cleaning:**
  - **Windows & Fixtures:** Clean all glass (inside/out), frames, sills, blinds, light fixtures, vents, and ceiling fans.
  - **Appliances:** Deep clean inside/outside of ranges, ovens, refrigerators, vent hoods, and microwaves. Move appliances to clean behind and underneath.
  - **Surfaces & Cabinets:** Sanitize sinks, countertops, shelves, and cabinetry. Wipe and oil all woodwork.
  - **Bathrooms:** Disinfect tubs, showers, toilets, mirrors, and vanities. Remove hard water stains and polish all chrome surfaces.
  - **Floors:**
    - *VCT:* Strip, wax (2 coats), and buff.
    - *LVT:* Clean with neutral pH cleaner and microfiber mops only.
    - *Tile:* Mop with mild detergent and clean grout lines.
  - **General Areas:** Clean closets, doors, trim, baseboards, and storage spaces.
  - **Exterior Areas:** Sweep, pressure wash porches, entryways, and steps.
  - **Equipment Used:** Vacuums, buffers, wet-vacs, microfiber mops, scrub pads, HEPA dusters, and eco-safe cleaning agents.
  - **Pressure Washing:**
  - Power wash porches, patios, steps, and walkways to remove dirt, mildew, and buildup.
  - Clean window screens, storm doors, and exterior light fixtures.
  - Use low-pressure settings near paint or delicate finishes.
  - All water usage will comply with property guidelines and environmental standards.
  - **Painting Services:**
  - These include tasks like dusting sills, blinds, paneling, lighting fixtures, and exterior windows. Quarterly tasks will include high-dusting and detailed cleaning of vertical surfaces and tenant office areas. Quarterly tasks are guidelines only. These services will be performed at minimum once per quarter or more frequently as needed. Protect all floors, appliances, and cabinetry using plastic and drop cloths.
  - Patch small holes, cracks, or scuffs and match existing texture.
  - Repaint walls, ceilings, trim, and doors where needed.
  - Address any marks, stains, or repairs caused by cleaning or maintenance.
  - Notify onsite manager upon completion for final inspection and approval.
  - DMC provides all painting tools, ladders, and materials (PAMI provides paint).
-



### 3. As Needed Maintenance

When requested, DMC will provide basic maintenance and turnover support, including:

- Minor electrical and plumbing adjustments (e.g., outlet covers, fixture tightening).
- Drywall repair and texture blending.
- Floor patching or trim replacement.
- General handyman support for move-in readiness

All cleaners and maintenance technicians will maintain constant communication with their supervisor to ensure any issues are promptly addressed.

### 4. Supervisor Duties

- **Daily Oversight:** Supervisors will oversee the cleaning and maintenance staff, ensuring that all assigned tasks are completed as scheduled and in accordance with quality standards.
- **Performance Monitoring:** Supervisors will perform routine inspections of all cleaned areas and document any issues or corrective actions taken.
- **Staff Coordination:** Supervisors will manage schedules, ensuring that adequate coverage is provided for all shifts, and will handle any issues related to custodial staff unavailability.

### Key Control & Safety Reporting

- Keys will be held only by authorized Supervisors and returned daily to PAMI staff (if applicable).
  - If Davis Moving & Cleaning retains keys, they will be securely stored nightly at our office located at **13785 Research Blvd, Suite 125, Austin, Texas, 78750.**
  - Any safety-related incidents will be documented immediately through an **Incident Report**, including corrective actions and follow-up, which will be reviewed by the Project Manager.
-



## 5. Proposed Quality Control Plan

Our quality control measures will ensure that buildings are maintained to the highest standards. The plan includes:

- **Daily Cleaning Checklists:** Cleaners and Maintenance Technicians will follow a comprehensive checklist for each task, ensuring no detail is overlooked. Supervisors will review completed checklists to ensure adherence to standards.
- **Random Inspections:** Supervisors will conduct both random and scheduled inspections, addressing any concerns immediately.
- **Customer Feedback Loop:** Regular feedback from PAMI staff and facility managers will be actively sought and incorporated into ongoing service adjustments.
- **Staff Training:** Staff members will receive continuous training on cleaning techniques, safety procedures, and the use of cleaning products and equipment. Training will be regularly updated to reflect changes in the scope of work or industry best practices.

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### Quality Control Plan

Quality Control is of the utmost importance here at Davis Moving & Cleaning. We have implemented Quality Assurance and Quality Control measures to ensure satisfaction of our customers. Please find an overview of our QA/QC measures below:

- The Supervisor will complete daily inspections and submit a signed checklist to the Project Manager. The Supervisor is also responsible for monitoring work throughout each shift to ensure all tasks are performed to contract standards.
  - The Project Manager will perform formal inspections once per week and prepare a report, which will be shared with PAMI.
  - Housecall Pro, our CRM and Quality Control software, will be used for real-time logging, including staff clock-ins, service completions, and photo documentation (where applicable) for accountability.
  - Any deficiencies will be addressed immediately, and corrective action will be taken within 24 hours.
-

## Quality Assurance and Quality Control

Quality Control is of the utmost importance here at Davis Moving & Cleaning. We have implemented Quality Assurance and Quality Control measures to ensure the satisfaction of our customers. Please find an overview of our QA/QC measures below:

### **1. Quality Control Procedures:**

- Pre-Service Assessment: Before starting any project, we conduct a detailed assessment to understand the specific requirements and expectations of our customers. This includes site visits and thorough documentation of project scope and specifications.

### **2. In Process Monitoring:**

- Throughout the project, we have dedicated personnel responsible for monitoring quality control. They conduct regular inspections, ensure compliance with established standards, and address any deviations promptly. We maintain documentation of these inspections and keep our customers updated regularly via agreed upon communication methods. Documents will be uploaded to Google Drive or sent via email.

### **3. Post Service Evaluation:**

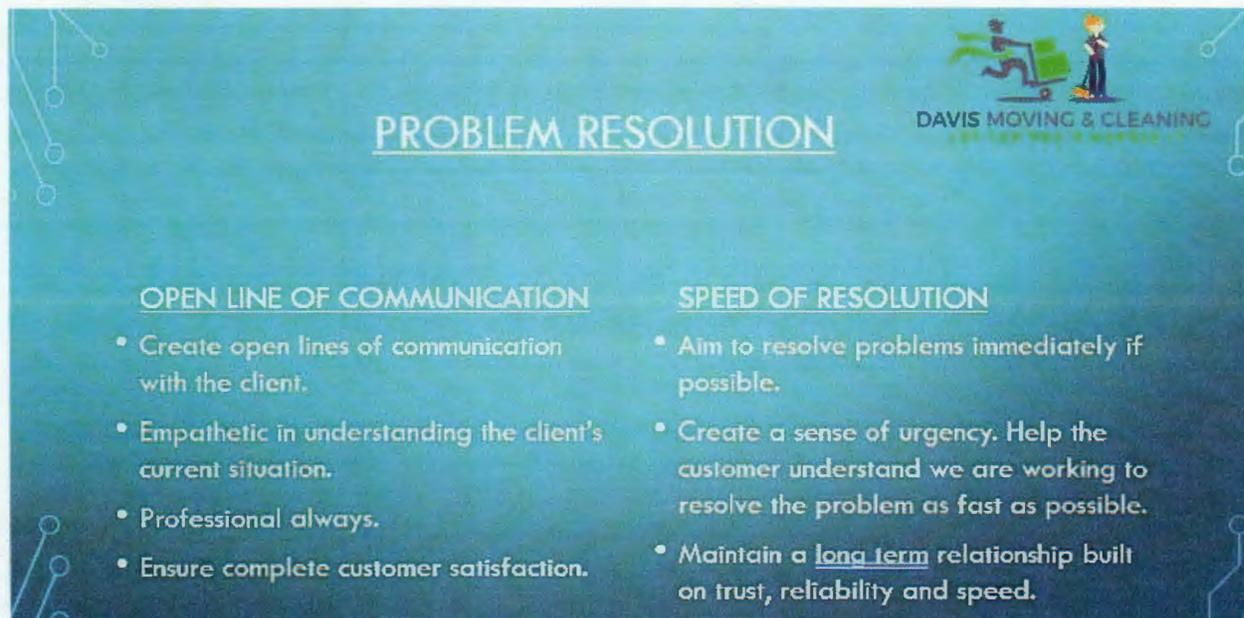
- Upon completion of the project, we conduct a thorough post-service evaluation to assess the quality of our deliverables. This includes reviewing customer feedback, conducting final inspections, and addressing any outstanding issues or concerns.



## Quality Assurance and Quality Control

### Problem Resolution:

In the event of any issues or concerns raised by our customers, we have a well-defined problem resolution process in place. We prioritize open communication and quick response times. Our dedicated team is readily available to address and resolve any problems that may arise during the project. We aim to ensure complete customer satisfaction and maintain long-term relationships built on trust and reliability.



The infographic features a blue background with white text and icons. At the top right is the Davis Moving & Cleaning logo. The title 'PROBLEM RESOLUTION' is centered at the top. Below it are two columns of bullet points under the sub-headers 'OPEN LINE OF COMMUNICATION' and 'SPEED OF RESOLUTION'.

<u>OPEN LINE OF COMMUNICATION</u>	<u>SPEED OF RESOLUTION</u>
<ul style="list-style-type: none"><li>• Create open lines of communication with the client.</li><li>• Empathetic in understanding the client's current situation.</li><li>• Professional always.</li><li>• Ensure complete customer satisfaction.</li></ul>	<ul style="list-style-type: none"><li>• Aim to resolve problems immediately if possible.</li><li>• Create a sense of urgency. Help the customer understand we are working to resolve the problem as fast as possible.</li><li>• Maintain a <u>long term</u> relationship built on trust, reliability and speed.</li></ul>

#### **4. Self-Assessment:**

5. We believe in continuous improvement, and self-assessment is an integral part of our QA/QC procedures. We regularly assess our own performance, seeking feedback from customers, and identifying areas for improvement. This self-assessment process allows us to identify trends, implement corrective measures, and consistently enhance the quality of our services.

#### **6. Interaction with Brooks**

Effective communication and collaboration with PAMI is key to successful project execution. We will establish lines of communication with PAMI representatives, including regular progress updates, status reports, and addressing any concerns promptly.

### Safety Plan:

Safety is of utmost importance to Davis Moving & Cleaning, and we are dedicated to implementing a comprehensive Safety Plan for the contract that includes specific procedures and training related to Material Safety Data Sheets (MSDS). Our goal is to create a secure working environment for our employees and all individuals involved in our custodial services while addressing employee injuries and accidents effectively.



#### 1. Safety Policies and Procedures:

- We have established robust safety policies and procedures, which encompass the handling of hazardous materials and the importance of following Material Safety Data Sheet (MSDS) guidelines.
- These safety policies are communicated to all employees upon hire and are reinforced through regular training and reminders.

#### 2. Employee Training:

- Our employees receive extensive training in safety protocols, including the proper use and interpretation of MSDS during their orientation and onboarding process.
- We conduct regular safety training sessions, including specific training on reading and understanding MSDS, to ensure that employees are up to date with the latest safety guidelines.



## Safety Plan:

### 3. Risk Assessment and Hazard Identification:

- In addition to general risk assessments, we conduct specific assessments to identify hazards related to hazardous chemicals and substances used in custodial services.
- This includes assessing risks associated with cleaning tasks, materials, and equipment involving hazardous substances.



### 4. Material Safety Data Sheets (MSDS):

- Employees are educated about the significance of MSDS as part of their safety training.
- We maintain a comprehensive MSDS library, readily accessible to all employees.

### 5. Personal Protective Equipment (PPE):

- PPE requirements are aligned with MSDS guidelines for hazardous materials, ensuring that employees are adequately protected.
- Employees are trained in the proper use and maintenance of PPE, as specified in the MSDS.



### 6. Emergency Response Plan with MSDS Integration:

- Our emergency response plan is closely integrated with MSDS procedures, outlining specific responses to chemical spills, exposures, or accidents.
- Employees are trained in how to consult MSDS in emergency situations for guidance on safe handling, containment, and cleanup of hazardous materials.

### 7. Reporting and Investigation:

- Accidents, injuries, and near misses related to hazardous materials are reported promptly, investigated thoroughly, and documented according to established procedures.
- MSDS information is reviewed as part of incident investigations to assess any deviations from safe handling practices.

## Safety Plan:

### 8. First Aid and Medical Support with MSDS Consideration:

- In addition to basic first aid training, employees are trained in first aid procedures specific to chemical exposures or accidents involving hazardous materials.
- MSDS information is consulted to determine appropriate first aid measures for chemical-related incidents.

### 9. Safety Committee:

- Our safety committee, including representatives with knowledge of MSDS, actively identifies and addresses safety concerns related to hazardous materials, reviews incident reports, and proposes safety improvements.

### 10. Continuous Improvement:

- The Safety Plan is continually reviewed and updated, incorporating the latest MSDS guidelines and industry best practices. - MSDS training and procedures are updated in accordance with changes in product formulations and regulations.

Through these comprehensive safety measures, including specific MSDS procedures and training, Davis Moving & Cleaning aims to maintain a secure working environment for its employees and ensure that safety remains a top priority in the execution of custodial services under the contract. Our commitment is to prevent accidents, reduce risks associated with hazardous materials, and respond effectively to any incidents, thereby safeguarding the health and well-being of our workforce and all stakeholders.





### **Proposed Inspection Schedule**

To maintain exceptional cleanliness and consistency at PAMI, Davis Moving & Cleaning will implement a structured inspection and maintenance program. This approach combines daily supervision, weekly audits, and monthly performance reviews—ensuring accountability, responsiveness, and continuous quality improvement through Housecall Pro digital tracking.

#### **1. Daily Inspections – On-Site Supervisor**

**Objective: Ensure consistent quality and service completion across all areas.**

- The Supervisor conducts walkthroughs of all assigned areas (restrooms, bedrooms, living room, kitchen, appliances, hallways, etc.).
- Completion checklists are verified for each cleaner and any issues corrected immediately.
- Deficiencies, supply needs, or maintenance concerns are logged in Housecall Pro with photos and notes.
- Inspection reports are reviewed by the Project Manager for oversight.

#### **2. Weekly Inspections – Project Manager**

**Objective: Verify service standards and overall site condition.**

- The Project Manager performs a formal weekly walk-through with the Supervisor.
- Focus areas include restrooms, kitchens, bedrooms, appliances, floors, high-traffic areas, and any previously flagged zones.
- Findings are summarized in a Weekly Quality Report with photos, corrective actions, and verification follow-ups.

#### **3. Monthly Performance Review – Client Coordination**

**Objective: Maintain open communication and address improvement opportunities.**

- The Project Manager and PAMI representative(s) will meet monthly (or as requested) to review quality reports, feedback, staffing, and schedule adjustments.
  - Outcomes and recommendations are summarized in a Monthly Performance Summary for record-keeping.
-



### **Proposed Inspection Schedule**

#### **4. As-Needed Inspections – Special Events or Requests**

**Objective: Provide immediate oversight for non-routine circumstances.**

- Additional inspections are conducted following special events, high-traffic days, weather events, or client requests.
- Findings and corrective actions are documented and included in the next quality report.

#### **5. Digital Documentation & Continuous Improvement**

All inspections are logged in Housecall Pro, providing timestamped photos, completion notes, and corrective actions. This ensures transparency, trend tracking, and accountability—supporting Davis Moving & Cleaning’s commitment to continuous service excellence for PAMI.

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# UNITY CONTRACTOR SERVICES, INC.

6448 East HWY 290 Suite F113 Austin, TX 78723  
(512)926-8065 office (512)926-1292 facsimile

## STATEMENT OF BIDDER'S QUALIFICATIONS

1. Name of Bidder: UNITY CONTRACTOR SERVICES, INC.
2. Permanent main office address. 6448 EAST HWY 290 SUITE F-113 AUSTIN, TX 78723
3. When organized. 1993 as Sole Proprietorship and then Incorporated in 2007
4. State whether bidder is a Corporation, Partnership, or Sole Proprietor. Corporation
5. If "Corporation, date and State of Incorporation" State of Texas January 2007
6. A breakdown of the minority ownership of the business (Gender, White, Black Hispanic, American Hispanic, American Indian/Eskimo, Asian/Pacific islander, etc.). Who owns what percent of the business, and any other related information?

100% minority owned-African American-Certified through DSMBR as MBE/DBE/Certified by U.S. Small Business Administration as located in a HUBZone area equivalent to Section 3

7. Number of years engaged in contracting business under present name.

Operated from 1993 to 2006 as United Contractor Services and 2007 to present under Unity Contractor Services, Inc.

### Contracts in Progress:

- Travis County JOC Construction
- Capital Metro IDIQ Construction/ Bus Stops
- Capital Metro Grounds Maintenance
- City of Austin Tree Care
- City of Austin Ponds Grounds Maintenance
- City of Austin ROW Grounds Maintenance
- City of Leander Grounds Maintenance
- HACA Grounds Maintenance
- HACA Tree Trimming
- Texas State University Grounds Maintenance
- Travis County Grounds Maintenance

8. General character of work performed by your company:

Unity has always performed with the highest degree of character

9. Report on any failures to complete work awarded to you (where, when & why). Report any contracts you have defaulted on. Not applicable

Report any contracts you or your company has defaulted on. Not applicable



# UNITY CONTRACTOR SERVICES, INC.

6448 East HWY 290 Suite F113 Austin, TX 78723  
(512)926-8065 office (512)926-1292 facsimile

10. Name & address of bonding company and name and address of agent.

Brent Baldwin: 972-644-2688, Baldwin-Cox Agency 5930 Preston View Blvd., Suite 200, Dallas, TX 75240

11. List 3 currently completed projects, including name, address, phone number and type of work.

- Travis County Juvenile Probation Department ISC building 1<sup>st</sup> & 3<sup>rd</sup> Floor Improvements Unity repainted all painted surfaces on the 1<sup>st</sup> floor, stairwells 1 & 2; 3<sup>rd</sup> floor painted the hallways, Gymnasium & Classrooms 1-5; in the Library Unity repainted the walls, metal doors, door and window frames while protecting all items not being painted; Living units 6-10 were repainted and cabinetry was demolished, removed and replaced with new in existing footprint- Travis County JOC Contract 3003 Andy Carey 700 Lavaca Suite 800 Austin, TX 78701; 512-854-9765
- Travis County Correctional Center Paint – Pressure wash & exterior paint (matching existing colors) all exterior surfaces of the following: Building 106: Perimeter doors. Designated awnings, generator, window trim and exposed metal & siding. Building 108: Perimeter doors & Siding only. CMU Wall: refreshed the CMU wall located at the entrance of the facility by pressure washing, spot priming and applying 2 new coats of A-100 exterior latex paint. Travis County JOC contract 3010 Steven Wentrcek (Travis County Sherrif's Office) 512-854-5209
- HACA REAC Inspections- From April – July of 2023 Unity mobilized to Meadowbrook, Georgian Manor, Northgate, Manchaca Village, Thurmond Heights & Bouldin Oaks to make various repairs throughout the property to help the sites be prepared for REAC inspections. Many items were fixed, replaced, or repaired including sheetrock and painting to match existing, Soffit work was performed at Bouldin Oaks. Unity worked closely with staff at each site to make sure all areas were taken care of in a professional & timely manner. Brad Kothman 512-767-7712

12. List any previous contracts with HACA, including dates performed.

- Tree Trimming 2012 - current
- Grounds Maintenance 2012- current
- Construction at Salina & Booker T. Washington: 2011
- PHAS Inspections renovation at scattered sites: 2012 – 2015
- HACA Thurmond Heights Phase IV Renovations: 2017
- Renovations at Thurmond Heights Phase III: 2016
- BTW & Meadowbrook RAD Renovations: 2019
- RAD Renovations Thurmond Heights, Santa Rita & Rosewood: 2019
- To date Unity Contractor Services, Inc. has been responsive to all requests for services from all HACA properties including but not limited to responding to the Winter Storm of 2021
- HACA REAC Inspections 2023
- Unity is currently providing make ready services on an as needed, quote basis – replacing flooring, cabinets, bathtubs shower valves, tub surround, painting, sheetrock repair and general cleaning to include removal of tenants' belongings left behind.



# UNITY CONTRACTOR SERVICES, INC.

well-being or operational mission of the installation and its population nor that would create a conflict of interest. A project that is done on time with goals and standards of high quality service in every facet of production and safety will be given to this project. Our construction workers are properly trained, highly skilled and qualified individuals with no less than 10 years of experience.

The inspection system to be implemented will ensure that requested services are provided with the highest possible customer service and in conformance with contract requirements. Our plan includes daily weekly and monthly inspections, safety meetings and Pre-Job Safety Hazard Analysis (JSA's) as appropriate.

## **Safety:**

As with all our jobs UCS will immediately implement a safety program that ensures protection of Government personnel, staff and property. To meet and exceed our established goals for safety, it is important to train, re-train, document and correct persons or situations with potential safety challenges. Accountabilities are defined, and performance indicators are measured. All incidents are required to be reported and appropriately recorded. UCS will notify the Property Staff within 1 hour of any mishaps or incidents. Notification will include all pertinent information and we will follow up with a written report.

All Workers are required to follow our following Ten Commandments of Safety:

- \* LEARN the safe way to do your job before you start.
- \* THINK safety and ACT safely always.
- \* OBEY safety rules and regulations-they are for your protection.
- \* WEAR proper clothing and protective equipment.
- \* CONDUCT yourself properly at all times-horseplay is prohibited.
- \* OPERATE only the equipment you are authorized to use.
- \* INSPECT tools and equipment for safe conditions before starting work.
- \* ADVISE your supervisor promptly of any unsafe conditions or practices.
- \* REPORT any injury to your supervisor immediately.
- \* SUPPORT your safety program and take an active part in safety meetings.



# UNITY CONTRACTOR SERVICES, INC.

## **Proposed Plan of Action**

Upon receiving a make-ready request, Unity will arrange a walkthrough of the unit with the appropriate staff and ensure all work is discussed with staff prior to proceeding. Before work begins, Unity will provide an estimated date, time and duration of the work being requested. . Unity will gather the necessary materials and tools needed to accomplish the project in a timely fashion.

Crews will arrive on the day, and time agreed upon prepared to begin the work in the time allotted. Unity keeps tools, materials and supplies in stock for minor repairs, painting and cleaning. Unity is aware that each property has different types of flooring and is familiar with where to purchase uniform materials that are currently used at all properties. Any supplies that are not readily in stock, Unity has the ability to quickly obtain what is needed. Throughout the commencement of work Unity's Project Manager performs Quality Assurance Checks and upon completion of work, Unity will walk the property with the designated staff to ensure all work has been completed as requested.

Unity has completed multiple make ready's for HACA. Work has included removing tenants' belongings left behind; trash, mold and pest removal; sheetrock repair; painting; and emergency repairs. Unity has experienced hazardous units needing thorough cleaning, repair and paint as well as units that needed complete cleaning of all types of floor, sheetrock repairs, tubs (to include tub surrounds and valves) and doors replacements, electrical and plumbing as well as cabinet & countertop replacement.

Unity is responsive to emergency requests at any time and tries to be responsive to management & maintenance needs. Unity is familiar with HACA's established protocols for tenant notifications. Unity is also acquainted with the various color schemes and with various requirements of each property location including the responsibility of protecting keys issued. Unity has the experience and staff available to ensure a quick turnaround on each unit in accordance with all requirements detailed in the Solicitation.

# Arturo Treviño

Office of Treviño Contractor

## Contact

Tel : 512-587-0334

E-mail: [trevinocont@live.com](mailto:trevinocont@live.com)

Fax : 210-932-9731

## Objective

With 35 years experience in Construction and as the owner of a family operated business, I strive everyday to expand and promote this company by providing high quality construction and build long lasting relationships. IEC License/Led Certified

## Key Skills

Licensed Contractor for Home Improvement and Sidewalks/Driveways with a vast array of experience in:

Complete Make Readies	Build Homes	Remodeling	Concrete Repair
Replace Sidewalks	Paint interior and exterior	Repair fire damaged units	Flooring

## Recognitions

Letters of Recommendations from:

- James L. Hargrove - President & CEO of Housing Authority of City of Austin
- James Teasdale - Planning & Development Director of Housing Authority of City of Austin
- Nora Morales - Purchasing Director of Housing Authority of City of Austin
- Albert Hernandez - Director of Maintenance Operations of San Marcos Housing Authority
- Donna Henderson - Property Manager of Blackland Community Development Corporation

## Licenses and Courses

Home Improvement #ICI-160

Sidewalk and Curve #TS842

- Owner of a Certified Section 3 Business;
- Certified as a Minority Business Enterprise (MBE).
- Certificate of Completion for removal asbestos resilient floor tile;
- Certificate of Recognition for completing Basic Supervisory, Skills in problem solving, Block A, B, and C;
- Certificate of Completion for Improving Interpersonal Communication;
- Certificate of Completion- Men & Women working together beyond gender stereotype.

## Work Experience

### San Antonio Housing Authority

Owner of Treviño Contractor

Self-Contractor

2001-Present

- ✓ Have completed over 5,500 make readies for SAHA for the past 14 years.
- ✓ Presently in an extended Contract for:
  - 2013 Unit Make Ready Services for Public Housing
  - 2013 Unit Make Ready Services Contract Painting for Non Profit Properties
  - 2013 Unit Make Ready Services Contract Housekeeping for Non Profit Properties
- ✓ Completed Make Readies which include such jobs as repair roof leaks, replace floor tile, repair ceramic tile, replace kitchen cabinets, replace medicine cabinets, replace window glasses, and sheet work repair.
- ✓ Complete 2 to 3 Emergency repairs per week such as replacing window units, floor repair, shower pans, etc.

- ✓ Completed Scatter-site home Make Readies.

**Housing Authority: City of Austin**

**Self-Contractor**

*Owner of Treviño Contractor*

**2000-Present**

- ✓ Completed approximately 5, 700 Make Readies for the past 15 years which include such jobs as repair roof leaks, replace floor tile, repair ceramic tile, replace kitchen cabinets, replace medicine cabinets, replace window glasses, and sheet work repair.
- ✓ Completed various jobs directly assigned from James Teasdale, Planning & Development Director for HACA.

**San Marcos Housing Authority**

**Self-Contractor**

*Owner of Treviño Contractor*

**2011-Present**

- ✓ Completed over 1,000 Make Readies, Remodeling, and repair sidewalks.

**Parole and Probation Office**

**Self-Contractor**

*Owner of Treviño Contractor*

**1998-1999, 2002-2003**

- ✓ Added 50 new offices with metal frames and five new bathrooms for ADA use;
- ✓ Repainted 40 offices, kitchen area, waiting room, reception area, and installed commercial carpet.
- ✓ Project cost approximately \$200,000.00.

**San Antonio Housing Authority**

**Full-Time Job**

*Shop Supervisor*

**1984-1998**

- ✓ Supervised over 120 employees under Director of Architect Service, Alfredo Ramirez;
- ✓ Sutton Homes - remodelled over 42 units including all framing, electric, and wall furnaces;
- ✓ Villa Veramendi - with a budget of \$1.2 Million remodelled over 50 units;
- ✓ Mirasol Homes - with a budget of \$2 Million replaced bathroom and kitchen cabinets throughout the entire complex;
- ✓ Cassiano Homes - with a budget of \$2 Million replaced bathroom and kitchen cabinets throughout entire complex;
- ✓ San Juan Homes - with a budget of \$2 Million replaced bathroom and kitchen cabinets throughout entire complex;
- ✓ Wheatley Courts- replaced all metal frame windows with aluminium frame windows and screens;



# CORZA

CONSTRUCTION

## **STATEMENT OF BIDDER'S QUALIFICATIONS**

Submit on a separate sheet(s) the following information and data. Include with Bid Proposal.

1. Name of Bidder.
2. Permanent main office address.
3. When organized.
4. State whether the bidder is a Corporation, Partnership, or Sole Proprietor.
5. If "Corporation, date and State of Incorporation.'
6. A breakdown of the minority ownership of the business (Gender, White, Black Hispanic, American Hispanic, American Indian/Eskimo, Asian/Pacific islander, etc.). Who owns what percent of the business, and any other related information.
7. Number of years engaged in contracting business under present name.
8. Contract in progress (gross amounts of contracts, estimated completion dated, project owner, architect).
9. General character of work performed by your company.
10. Report on any failures to complete work awarded to you (where, when & why).  
Report any contracts you have defaulted on.
11. Name & address of bonding company and name and address of agent.
12. List of three (3) currently completed projects, including name, address, phone number, and type of work
13. List any previous contracts, including dated executed with HACA

**1. NAME OF BIDDER**

**Answer: CORZA CONSTRUCTION LLC**

**2. PERMANENT MAIN OFFICE ADDRESS**

Office: 7612-B State Hwy 71 Austin, Texas 78735

Mailing: 780 W FM 1626 unit 2128 Manchaca, Texas 78652

**3. WHEN ORGANIZED**

**Answer: CORZA CONSTRUCTION LLC was Founded June 05, 2015**

**4. STATE WHETHER THE BIDDER IS A CORPORATION,  
PARTNERSHIP, OR SOLE PROPRIETOR.**

**Answer: CORZA CONSTRUCTION LLC - is a Limited Liability Company**

**5. IF "CORPORATION, DATE AND STATE OF  
INCORPORATION.**

**Answer: N/A**

**6. A BREAKDOWN OF THE MINORITY OWNERSHIP OF THE  
BUSINESS (GENDER, WHITE, BLACK HISPANIC,  
AMERICAN HISPANIC, AMERICAN INDIAN/ESKIMO,  
ASIAN/PACIFIC ISLANDER, ETC.). WHO OWNS WHAT**

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**PERCENT OF THE BUSINESS, AND ANY OTHER RELATED INFORMATION.**

**Answer:** Hispanic

**7. NUMBER OF YEARS ENGAGED IN CONTRACTING BUSINESS UNDER PRESENT NAME.**

**Answer:** 10 years

**8. CONTRACT IN PROGRESS (GROSS AMOUNTS OF CONTRACTS, ESTIMATED COMPLETION DATED, PROJECT OWNER, ARCHITECT).**

**Answer:** Corza Construction LLC holds several active contracts with the City of Austin, including;

**MA5000 NA250000240 – Flooring Installation, Refinishing, and Repair Services - Estimated \$ \$8,600,000.00, Date: 10/23/2025-10/22/2027**

**MA7500 NA220000126 – Skilled Trades Maintenance and Repair. - Estimated \$52,396,000.00, Date: 06/21/2022-06/21/2027**

**MA 6300 NA230000096 – Mowing and Grounds Maintenance - Estimated \$22,400,000.00, Date: 02/21/2023-02/20/2028**

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**9. GENERAL CHARACTER OF WORK PERFORMED BY  
YOUR COMPANY.**

**Answer:** Since its establishment in 2015, Corza Construction LLC has proudly served the public sector as a general contractor. Our services include but are not limited to landscaping, groundskeeping, general facility maintenance, painting, concrete, masonry, demolition and other related project maintenance. Over the years, we've broadened our expertise to address a wide spectrum of client needs, big or small. In Texas, we ensure that every project from planning to execution and quality control is managed by well-informed and skilled professionals. We invest in our employees through rigorous training in quality standards and procedures relevant to their roles and project requirements. We also validate their skills before assigning responsibilities and continuously monitor their performance to ensure ongoing qualification.

**10. REPORT ON ANY FAILURES TO COMPLETE WORK  
AWARDED TO YOU (WHERE, WHEN & WHY). REPORT  
ANY CONTRACTS YOU HAVE DEFAULTED ON.**

**Answer:** Corza Construction LLC has not experienced any failures to complete awarded work, has not defaulted on any contracts, and has successfully delivered all work to the satisfaction of the client.

**11. NAME & ADDRESS OF BONDING COMPANY AND  
NAME AND ADDRESS OF AGENT.**

**Answer: Grant Ballew, Surety Bond Producer**

**Ballew Surety Agency, Inc.**

**512-422-7154 (mobile)**

**512-454-9500 (office)**

**12. LIST OF THREE (3) CURRENTLY COMPLETED  
PROJECTS, INCLUDING NAME, ADDRESS, PHONE  
NUMBER, AND TYPE OF WORK**

**Answer:**

1. Point of Contact for MA 6300 NA230000096 – Mowing and Grounds Maintenance

Name: Joshua Solis

Email: [Joshua.Solis@austintexas.gov](mailto:Joshua.Solis@austintexas.gov)

Number: 512-974-9449 / 737-291-3134

2. Point of Contact for Austin - Travis County EMS

Name: Gadiel Arellano

Email: [gadiel.arellano@austin.gov](mailto:gadiel.arellano@austin.gov)

Number: 512-221-3860

3. Point of Contact for Austin Energy

Name: Christopher Gilliam

Email: [christopher.gilliam@austinenergy.com](mailto:christopher.gilliam@austinenergy.com)

Number: 512-699-8301

**13. LIST ANY PREVIOUS CONTRACTS, INCLUDING  
DATED EXECUTED WITH HACA**

**Answer:** Corza Construction LLC does not have any previous contracts, including any dated or executed with HACA; however, we believe that our experience throughout the years qualifies us to successfully perform this project.

THANK YOU!

Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Cost Effectiv(up to 30 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Documented past experience and performance (up to 15 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Staff Qualifications and Experience (up to 15 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>TOTAL</b>	<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>	

RECOMMENDED AGENCY

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EVALUATOR

First & Last Name

Date

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Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	29		30		25		15		30	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Plan outlines staffing and quality control measures including checklist, site assessments, disciplinary, and safety protocols.		Yes - the vendor elect to provide 1- Project Manager; 1 On-site Supervisor, and 6 full time cleaners to ensure service quality and timely completion		Vendor did not provide a good plan to demonstrate how services would be rendered. However, We Do It All, LLC is a current vendor provide Make Ready cleaning services at 3 HACA Properties.		N/A - Over bid the contract.		Long-standing vendor; knowledge of standard make ready status at move out. Vendor is also familiar with HACA standards, floor materials, and timelines for completion	
<b>Cost Effectiv(up to 30 points)</b>	30		30		20		10		20	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	What		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning and LOT 3 - General Maintennace repairs. Vendor cost was too high for LOT 2		LOT 1 & LOT 2 bids are unreasonable. Contract will only be awarded for LOT 3 - General Maintenance.		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)	
<b>Documented past experience and performance (up to 15 points)</b>	15		10		10		15		15	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	10 years in business servicing several city agencies, with over 10 plus completed projects.		Years in business - 6; Three (3) active contracts. Past projects include working with housing authority residents; relocation services.		Experience is based on performance at HACA properties.		Long-standing vendor with great performance, however bids do not in-line with the scope of work.		Current vendor; preferred based on service.	
<b>Staff Qualifications and Experience (up to 15 points)</b>	15		10		10		15		15	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Resume submissions for all supervising staff with notable experience included on each.		Past contract services include a mix of cleaning ISD locations and city buildings. Currently servicing 4 locations.		Unable to locate in proposal. Points issued based on staff feedback regarding performance.		Unity Contractor is a long standing vendor with the agency with a great track record regarding experience and performance. However, cost does not align with scope as noted on bids		Trevino - 35 years of experience in cleaning service industry. Years of experience serving HACA properties.	
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>	10		10		10		10		10	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small, minority, and woman-owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	
<b>TOTAL</b>	<b>99</b>		<b>90</b>		<b>75</b>		<b>65</b>		<b>90</b>	

RECOMMENDED AGENCY | LOT 1 - M&R Elite, We DO It All, Trevino Contractor, Corza Construction, Davis Moving & Cleaning. LOT 2 - Trevino, Corza, Davis. LOT 3 - We Do It All, Unity, Corza, Davis.

EVALUATOR Crystal James 01/29/2026  
 First & Last Name Date

Evaluation	Vendor #1	Vendor #2	Vendor #3	Vendor #4	Vendor #5
Criteria	Corza Construction	Davis Moving & Cleaning	We Do It All, LLC.	Unity Contractor	Trevino Contractor
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	20	30	25	20	30
	<b>Comments</b> The proposal outlines a process for monitoring service to completion. Leads, supervisors, and checklist for 4 member crews.	<b>Comments</b> Plan proposal was detail and focuses on monitoring services, service quality, and quality controls in place. The staffing outline is reasonable to meet the needs of the contract to ensure completion.	<b>Comments</b> Current vendor servicing Thurmond, Northgate, and Coronado Hills. Advised with onsite staff regarding progress; happy with service.	<b>Comments</b> N/A - Understands the scope of work, however over bid the project.	<b>Comments</b> Current vendor; preferred at several sites.
<b>Cost Effectiv(up to 30 points)</b>		30	20	10	20
	<b>Comments</b>	<b>Comments</b> Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.	<b>Comments</b> Reasonable prices for service for LOT 1 - Cleaning and LOT 3 - General Maintennace repairs; meets budget. Vendor cost was too high for LOT 2	<b>Comments</b> N/A - Over bid the project for LOT 1 and LOT 2; LOT 3 accepted.	<b>Comments</b> Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)
<b>Documented past experience and performance (up to 15 points)</b>	20	13	10	15	10
	<b>Comments</b> Acceptable past experience and performance. Understands cleaning services, but no experience with vacancies.	<b>Comments</b> Years in business - 6; Three (3) active contracts. Past projects include working with housing authority residents; relocation services.	<b>Comments</b> Established 3 years ago; Past experience limited to services complete at 3 HACA properties.	<b>Comments</b> N/A - Over bid the project.	<b>Comments</b> Current vendor; preferred based on service.
<b>Staff Qualifications and Experience (up to 15 points)</b>	15	10	10	15	15
	<b>Comments</b> Outline safety training; Staff resumes include years of experience both within and outside Corza Construction.	<b>Comments</b> While past contract experience was present, staff training and specific qualifications were not clear.	<b>Comments</b> Unclear where this is disclosed in proposal. Credit given for current vendor service performance.	<b>Comments</b> Known vendor with a long-standing record of performance.	<b>Comments</b> Owner industry experience - 35yrs. long standing vendor serving HACA properties.
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>		10	10	10	10
	<b>Comments</b> Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	<b>Comments</b> Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	<b>Comments</b> Yes - HUD Form 5369-C notes the vendor elect small, minority, and woman-owned business.	<b>Comments</b> Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	<b>Comments</b> Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.
<b>TOTAL</b>	<b>55</b>	<b>93</b>	<b>75</b>	<b>70</b>	<b>85</b>

RECOMMENDED AGENCY | LOT 1 - M&R Elite, We DO It All, Trevino Contractor, Corza Construction, Davis Moving & Cleaning. LOT 2 - Trevino, Corza, Davis. LOT 3 - We Do It All, Unity, Corza, Davis.

EVALUATOR | Michael Roth | 02/02/2026  
 First & Last Name | Date

Evaluation	Vendor #1	Vendor #2	Vendor #3	Vendor #4	Vendor #5
Criteria	Corza Construction	Davis Moving & Cleaning	We Do It All, LLC.	Unity Contractor	Trevino Contractor
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	29 Comments	29 Comments	30 Comments	30 Comments	30 Comments
	Demonstared plan is reasonable to assume vendors understanding of the scope associated with the RFP.	Vendor presented a management plan and demonstrated capacity to handle the project. 1 Project Manager; 1 onsite Supervisor, 6 Cleaners, 3 Part-time cleaners (as needed), 2 painters	I didn't see a proposed plan as to how the company plans to manage capacity, but I can see that the company is a current vendor with good feedback from staff.	Current vendor at HACA properties; understands the work needed.	Current vendor; preferred at several PAMI sites due to fast service and known standards.
<b>Cost Effectiv(up to 30 points)</b>	30 Comments	29 Comments	22 Comments	10 Comments	30 Comments
		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.	Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning and LOT 3 - General Maintennace repairs. Vendor cost was too high for LOT 2	LOT 1 & LOT 2 are not reasonable in cost. LOT 3 will be rewarded.	Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)
<b>Documented past experience and performance (up to 15 points)</b>	15 Comments	15 Comments	14 Comments	15 Comments	15 Comments
	Vendor past experience documents notable contracts with city and government agencies. References included.	Years in business - 6; Three (3) active contracts. Past projects include working with housing authority residents; relocation services.	New vendor; 3 years old. Past experience is limited to current HACA projects, including Thurmond, Northgate, and Coronado.	Great vendor and performance; however out of budget for Cleaning and Painting services.	Current vendor; preferred based on service.
<b>Staff Qualifications and Experience (up to 15 points)</b>	15 Comments	13 Comments	15 Comments	15 Comments	12 Comments
	Company qualifications and work experience submitted with the inclusion of team resumes noting individual experience levels.	Cleaning contrats noting experience present; staff quaifications remain unknown.	Current vendor; Experience evaluated by staff at contracted sites.	Included however experience is known; just not cost efficient.	Qualified and experience serving HACA properties and past record servicing other housing agencies.
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>	10 Comments	10 Comments	10 Comments	10 Comments	10 Comments
	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	Yes - HUD Form 5369-C notes the vendor elect small, minority, and woman-owned business.	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.
<b>TOTAL</b>	<b>99</b>	<b>96</b>	<b>91</b>	<b>80</b>	<b>97</b>

RECOMMENDED AGENCY | LOT 1 - M&R Elite, We DO It All, Trevino Contractor, Corza Construction, Davis Moving & Cleaning. LOT 2 - Trevino, Corza, Davis. LOT 3 - We Do It All, Unity, Corza, Davis.

EVALUATOR Frank Garcia 01/29/2026  
 First & Last Name Date

Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	Comments		Comments		Comments		Comments		Comments	
			Yes - Vendor included measures such as quality control procedures, onsite monitoring, and post service evaluations.						Yes - Demonstrated as seen in current performance. Current preferred vendor	
<b>Cost Effectiv(up to 30 points)</b>	Comments		Comments		Comments		Comments		20 Comments	
			Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.						Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)	
<b>Documented past experience and performance (up to 15 points)</b>	Comments		Comments		Comments		Comments		Comments	
			Experience - 6 years; multiple contracts complete including both cleaning and moving services. Returning vendor						Current vendor; preferred based on service.	
<b>Staff Qualifications and Experience (up to 15 points)</b>	Comments		Comments		Comments		Comments		Comments	
			Staff qualifications and individual experieince is not in the proposal.						Current vendor; preferred based on current and past contract service.	
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>	Comments		10 Comments		Comments		Comments		10 Comments	
			Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.						Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	
<b>TOTAL</b>	<b>0</b>		<b>10</b>		<b>0</b>		<b>0</b>		<b>30</b>	

RECOMMENDED AGENCY

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EVALUATOR

First & Last Name

Date

Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Cost Effectiv(up to 30 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Documented past experience and performance (up to 15 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Staff Qualifications and Experience (up to 15 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>TOTAL</b>	<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>	

RECOMMENDED AGENCY

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EVALUATOR

First & Last Name

Date

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Evaluation	Vendor #1	Vendor #2	Vendor #3	Vendor #4	Vendor #5
Criteria	Corza Construction	Davis Moving & Cleaning	We Do It All, LLC.	Unity Contractor	Trevino Contractor
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	29 Comments	30 Comments	25 Comments	15 Comments	30 Comments
	Plan outlines staffing and quality control measures including checklist, site assessments, disciplinary, and safety protocols.	Yes - the vendor elect to provide 1- Project Manager; 1 On-site Supervisor, and 6 full time cleaners to ensure service quality and timely completion	Vendor did not provide a good plan to demonstrate how services would be rendered. However, We Do It All, LLC is a current vendor provide Make Ready cleaning services at 3 HACA Properties.	N/A - Over bid the contract.	Long-standing vendor; knowledge of standard make ready status at move out. Vendor is also familiar with HACA standards, floor materials, and timelines for completion
<b>Cost Effectiv(up to 30 points)</b>	30 Comments	30 Comments	20 Comments	10 Comments	20 Comments
	What	Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.	Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning and LOT 3 - General Maintennace repairs. Vendor cost was too high for LOT 2	LOT 1 & LOT 2 bids are unreasonable. Contract will only be awarded for LOT 3 - General Maintenance.	Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)
<b>Documented past experience and performance (up to 15 points)</b>	15 Comments	10 Comments	10 Comments	15 Comments	15 Comments
	10 years in business servicing several city agencies, with over 10 plus completed projects.	Years in business - 6; Three (3) active contracts. Past projects include working with housing authority residents; relocation services.	Experience is based on performance at HACA properties.	Long-standing vendor with great performance, however bids do not in-line with the scope of work.	Current vendor; preferred based on service.
<b>Staff Qualifications and Experience (up to 15 points)</b>	15 Comments	10 Comments	10 Comments	15 Comments	15 Comments
	Resume submissions for all supervising staff with notable experience included on each.	Past contract services include a mix of cleaning ISD locations and city buildings. Currently servicing 4 locations.	Unable to locate in proposal. Points issued based on staff feedback regarding performance.	Unity Contractor is a long standing vendor with the agency with a great track record regarding experience and performance. However, cost does not align with scope as noted on bids	Trevino - 35 years of experience in cleaning service industry. Years of experience serving HACA properties.
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>	10 Comments	10 Comments	10 Comments	10 Comments	10 Comments
	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	Yes - HUD Form 5369-C notes the vendor elect small, minority, and woman-owned business.	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.
<b>TOTAL</b>	<b>99</b>	<b>90</b>	<b>75</b>	<b>65</b>	<b>90</b>

RECOMMENDED AGENCY | LOT 1 - M&R Elite, We DO It All, Trevino Contractor, Corza Construction, Davis Moving & Cleaning. LOT 2 - Trevino, Corza, Davis. LOT 3 - We Do It All, Unity, Corza, Davis.

EVALUATOR Crystal James 01/29/2026  
 First & Last Name Date

Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	20		30		25		20		30	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	The proposal outlines a process for monitoring service to completion. Leads, supervisors, and checklist for 4 member crews.		Plan proposal was detail and focuses on monitoring services, service quality, and quality controls in place. The staffing outline is reasonable to meet the needs of the contract to ensure completion.		Current vendor servicing Thurmond, Northgate, and Coronado Hills. Advised with onsite staff regarding progress; happy with service.		N/A - Understands the scope of work, however over bid the project.		Current vendor; preferred at several sites.	
<b>Cost Effectiv(up to 30 points)</b>			30		20		10		20	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
			Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.		Reasonable prices for service for LOT 1 - Cleaning and LOT 3 - General Maintennace repairs; meets budget. Vendor cost was too high for LOT 2		N/A - Over bid the project for LOT 1 and LOT 2; LOT 3 accepted.		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)	
<b>Documented past experience and performance (up to 15 points)</b>	20		13		10		15		10	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Acceptable past experience and performance. Understands cleaning services, but no experience with vacancies.		Years in business - 6; Three (3) active contracts. Past projects include working with housing authority residents; relocation services.		Established 3 years ago; Past experience limited to services complete at 3 HACA properties.		N/A - Over bid the project.		Current vendor; preferred based on service.	
<b>Staff Qualifications and Experience (up to 15 points)</b>	15		10		10		15		15	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Outline safety training; Staff resumes include years of experience both within and outside Corza Construction.		While past contract experience was present, staff training and specific qualifications were not clear.		Unclear where this is disclosed in proposal. Credit given for current vendor service performance.		Known vendor with a long-standing record of performance.		Owner industry experience - 35yrs. long standing vendor serving HACA properties.	
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>			10		10		10		10	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small, minority, and woman-owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	
<b>TOTAL</b>	<b>55</b>		<b>93</b>		<b>75</b>		<b>70</b>		<b>85</b>	

RECOMMENDED AGENCY | LOT 1 - M&R Elite, We DO It All, Trevino Contractor, Corza Construction, Davis Moving & Cleaning. LOT 2 - Trevino, Corza, Davis. LOT 3 - We Do It All, Unity, Corza, Davis.

EVALUATOR | Michael Roth | 02/02/2026  
 First & Last Name | Date

Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	29		29		30		30		30	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Demonstared plan is reasonable to assume vendors understanding of the scope associated with the RFP.		Vendor presented a management plan and demonstrated capacity to handle the project. 1 Project Manager; 1 onsite Supervisor, 6 Cleaners, 3 Part-time cleaners (as needed), 2 painters		I didn't see a proposed plan as to how the company plans to manage capacity, but I can see that the company is a current vendor with good feedback from staff.		Current vendor at HACA properties; understands the work needed.		Current vendor; preferred at several PAMI sites due to fast service and known standards.	
<b>Cost Effectiv(up to 30 points)</b>	30		29		22		10		30	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
			Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning and LOT 3 - General Maintennace repairs. Vendor cost was too high for LOT 2		LOT 1 & LOT 2 are not reasonable in cost. LOT 3 will be rewarded.		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)	
<b>Documented past experience and performance (up to 15 points)</b>	15		15		14		15		15	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Vendor past experience documents notable contracts with city and government agencies. References included.		Years in business - 6; Three (3) active contracts. Past projects include working with housing authority residents; relocation services.		New vendor; 3 years old. Past experience is limited to current HACA projects, including Thurmond, Northgate, and Coronado.		Great vendor and performance; however out of budget for Cleaning and Painting services.		Current vendor; preferred based on service.	
<b>Staff Qualifications and Experience (up to 15 points)</b>	15		13		15		15		12	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Company qualifications and work experience submitted with the inclusion of team resumes noting individual experience levels.		Cleaning contrats noting experience present; staff quaifications remain unknown.		Current vendor; Experience evaluated by staff at contracted sites.		Included however experience is known; just not cost efficient.		Qualified and experience serving HACA properties and past record servicing other housing agencies.	
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>	10		10		10		10		10	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small, minority, and woman-owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	
<b>TOTAL</b>	<b>99</b>		<b>96</b>		<b>91</b>		<b>80</b>		<b>97</b>	

RECOMMENDED AGENCY | LOT 1 - M&R Elite, We DO It All, Trevino Contractor, Corza Construction, Davis Moving & Cleaning. LOT 2 - Trevino, Corza, Davis. LOT 3 - We Do It All, Unity, Corza, Davis.

EVALUATOR Frank Garcia 01/29/2026  
 First & Last Name Date

Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	Comments		Comments		Comments		Comments		Comments	
			Yes - Vendor included measures such as quality control procedures, onsite monitoring, and post service evaluations.						Yes - Demonstrated as seen in current performance. Current preferred vendor	
<b>Cost Effectiv(up to 30 points)</b>	Comments		Comments		Comments		Comments		20 Comments	
			Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.						Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)	
<b>Documented past experience and performance (up to 15 points)</b>	Comments		Comments		Comments		Comments		Comments	
			Experience - 6 years; multiple contracts complete including both cleaning and moving services. Returning vendor						Current vendor; preferred based on service.	
<b>Staff Qualifications and Experience (up to 15 points)</b>	Comments		Comments		Comments		Comments		Comments	
			Staff qualifications and individual experieince is not in the proposal.						Current vendor; preferred based on current and past contract service.	
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>	Comments		10 Comments		Comments		Comments		10 Comments	
			Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.						Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	
<b>TOTAL</b>	<b>0</b>		<b>10</b>		<b>0</b>		<b>0</b>		<b>30</b>	

RECOMMENDED AGENCY

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EVALUATOR

First & Last Name

Date

Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Cost Effectiv(up to 30 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Documented past experience and performance (up to 15 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Staff Qualifications and Experience (up to 15 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>TOTAL</b>	<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>	

RECOMMENDED AGENCY

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EVALUATOR

First & Last Name

Date

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Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	29		30		25		15		30	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Plan outlines staffing and quality control measures including checklist, site assessments, disciplinary, and safety protocols.		Yes - the vendor elect to provide 1- Project Manager; 1 On-site Supervisor, and 6 full time cleaners to ensure service quality and timely completion		Vendor did not provide a good plan to demonstrate how services would be rendered. However, We Do It All, LLC is a current vendor provide Make Ready cleaning services at 3 HACA Properties.		N/A - Over bid the contract.		Long-standing vendor; knowledge of standard make ready status at move out. Vendor is also familiar with HACA standards, floor materials, and timelines for completion	
<b>Cost Effectiv(up to 30 points)</b>	30		30		20		10		20	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	What		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning and LOT 3 - General Maintennace repairs. Vendor cost was too high for LOT 2		LOT 1 & LOT 2 bids are unreasonable. Contract will only be awarded for LOT 3 - General Maintenance.		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)	
<b>Documented past experience and performance (up to 15 points)</b>	15		10		10		15		15	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	10 years in business servicing several city agencies, with over 10 plus completed projects.		Years in business - 6; Three (3) active contracts. Past projects include working with housing authority residents; relocation services.		Experience is based on performance at HACA properties.		Long-standing vendor with great performance, however bids do not in-line with the scope of work.		Current vendor; preferred based on service.	
<b>Staff Qualifications and Experience (up to 15 points)</b>	15		10		10		15		15	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Resume submissions for all supervising staff with notable experience included on each.		Past contract services include a mix of cleaning ISD locations and city buildings. Currently servicing 4 locations.		Unable to locate in proposal. Points issued based on staff feedback regarding performance.		Unity Contractor is a long standing vendor with the agency with a great track record regarding experience and performance. However, cost does not align with scope as noted on bids		Trevino - 35 years of experience in cleaning service industry. Years of experience serving HACA properties.	
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>	10		10		10		10		10	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small, minority, and woman-owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	
<b>TOTAL</b>	<b>99</b>		<b>90</b>		<b>75</b>		<b>65</b>		<b>90</b>	

RECOMMENDED AGENCY | LOT 1 - M&R Elite, We DO It All, Trevino Contractor, Corza Construction, Davis Moving & Cleaning. LOT 2 - Trevino, Corza, Davis. LOT 3 - We Do It All, Unity, Corza, Davis.

EVALUATOR Crystal James 01/29/2026  
 First & Last Name Date

Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	20		30		25		20		30	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	The proposal outlines a process for monitoring service to completion. Leads, supervisors, and checklist for 4 member crews.		Plan proposal was detail and focuses on monitoring services, service quality, and quality controls in place. The staffing outline is reasonable to meet the needs of the contract to ensure completion.		Current vendor servicing Thurmond, Northgate, and Coronado Hills. Advised with onsite staff regarding progress; happy with service.		N/A - Understands the scope of work, however over bid the project.		Current vendor; preferred at several sites.	
<b>Cost Effectiv(up to 30 points)</b>			30		20		10		20	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
			Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.		Reasonable prices for service for LOT 1 - Cleaning and LOT 3 - General Maintennace repairs; meets budget. Vendor cost was too high for LOT 2		N/A - Over bid the project for LOT 1 and LOT 2; LOT 3 accepted.		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)	
<b>Documented past experience and performance (up to 15 points)</b>	20		13		10		15		10	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Acceptable past experience and performance. Understands cleaning services, but no experience with vacancies.		Years in business - 6; Three (3) active contracts. Past projects include working with housing authority residents; relocation services.		Established 3 years ago; Past experience limited to services complete at 3 HACA properties.		N/A - Over bid the project.		Current vendor; preferred based on service.	
<b>Staff Qualifications and Experience (up to 15 points)</b>	15		10		10		15		15	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Outline safety training; Staff resumes include years of experience both within and outside Corza Construction.		While past contract experience was present, staff training and specific qualifications were not clear.		Unclear where this is disclosed in proposal. Credit given for current vendor service performance.		Known vendor with a long-standing record of performance.		Owner industry experience - 35yrs. long standing vendor serving HACA properties.	
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>			10		10		10		10	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small, minority, and woman-owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	
<b>TOTAL</b>	<b>55</b>		<b>93</b>		<b>75</b>		<b>70</b>		<b>85</b>	

RECOMMENDED AGENCY | LOT 1 - M&R Elite, We DO It All, Trevino Contractor, Corza Construction, Davis Moving & Cleaning. LOT 2 - Trevino, Corza, Davis. LOT 3 - We Do It All, Unity, Corza, Davis.

EVALUATOR | Michael Roth | 02/02/2026  
 First & Last Name | Date

Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	29		29		30		30		30	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Demonstared plan is reasonable to assume vendors understanding of the scope associated with the RFP.		Vendor presented a management plan and demonstrated capacity to handle the project. 1 Project Manager; 1 onsite Supervisor, 6 Cleaners, 3 Part-time cleaners (as needed), 2 painters		I didn't see a proposed plan as to how the company plans to manage capacity, but I can see that the company is a current vendor with good feedback from staff.		Current vendor at HACA properties; understands the work needed.		Current vendor; preferred at several PAMI sites due to fast service and known standards.	
<b>Cost Effectiv(up to 30 points)</b>	30		29		22		10		30	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
			Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning and LOT 3 - General Maintennace repairs. Vendor cost was too high for LOT 2		LOT 1 & LOT 2 are not reasonable in cost. LOT 3 will be rewarded.		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)	
<b>Documented past experience and performance (up to 15 points)</b>	15		15		14		15		15	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Vendor past experience documents notable contracts with city and government agencies. References included.		Years in business - 6; Three (3) active contracts. Past projects include working with housing authority residents; relocation services.		New vendor; 3 years old. Past experience is limited to current HACA projects, including Thurmond, Northgate, and Coronado.		Great vendor and performance; however out of budget for Cleaning and Painting services.		Current vendor; preferred based on service.	
<b>Staff Qualifications and Experience (up to 15 points)</b>	15		13		15		15		12	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Company qualifications and work experience submitted with the inclusion of team resumes noting individual experience levels.		Cleaning contrats noting experience present; staff quaifications remain unknown.		Current vendor; Experience evaluated by staff at contracted sites.		Included however experience is known; just not cost efficient.		Qualified and experience serving HACA properties and past record servicing other housing agencies.	
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>	10		10		10		10		10	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small, minority, and woman-owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	
<b>TOTAL</b>	<b>99</b>		<b>96</b>		<b>91</b>		<b>80</b>		<b>97</b>	

RECOMMENDED AGENCY | LOT 1 - M&R Elite, We DO It All, Trevino Contractor, Corza Construction, Davis Moving & Cleaning. LOT 2 - Trevino, Corza, Davis. LOT 3 - We Do It All, Unity, Corza, Davis.

EVALUATOR Frank Garcia 01/29/2026  
 First & Last Name Date

Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	Comments		Comments		Comments		Comments		Comments	
			Yes - Vendor included measures such as quality control procedures, onsite monitoring, and post service evaluations.						Yes - Demonstrated as seen in current performance. Current preferred vendor	
<b>Cost Effectiv(up to 30 points)</b>	Comments		Comments		Comments		Comments		20 Comments	
			Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.						Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)	
<b>Documented past experience and performance (up to 15 points)</b>	Comments		Comments		Comments		Comments		Comments	
			Experience - 6 years; multiple contracts complete including both cleaning and moving services. Returning vendor						Current vendor; preferred based on service.	
<b>Staff Qualifications and Experience (up to 15 points)</b>	Comments		Comments		Comments		Comments		Comments	
			Staff qualifications and individual experieince is not in the proposal.						Current vendor; preferred based on current and past contract service.	
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>	Comments		10 Comments		Comments		Comments		10 Comments	
			Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.						Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	
<b>TOTAL</b>	<b>0</b>		<b>10</b>		<b>0</b>		<b>0</b>		<b>30</b>	

RECOMMENDED AGENCY

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EVALUATOR

First & Last Name

Date

Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Cost Effectiv(up to 30 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Documented past experience and performance (up to 15 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Staff Qualifications and Experience (up to 15 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>		Comments		Comments		Comments		Comments		Comments
<b>TOTAL</b>	<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>	

RECOMMENDED AGENCY

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EVALUATOR

First & Last Name

Date

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Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	29		30		25		15		30	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Plan outlines staffing and quality control measures including checklist, site assessments, disciplinary, and safety protocols.		Yes - the vendor elect to provide 1- Project Manager; 1 On-site Supervisor, and 6 full time cleaners to ensure service quality and timely completion		Vendor did not provide a good plan to demonstrate how services would be rendered. However, We Do It All, LLC is a current vendor provide Make Ready cleaning services at 3 HACA Properties.		N/A - Over bid the contract.		Long-standing vendor; knowledge of standard make ready status at move out. Vendor is also familiar with HACA standards, floor materials, and timelines for completion	
<b>Cost Effectiv(up to 30 points)</b>	30		30		20		10		20	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	What		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning and LOT 3 - General Maintennace repairs. Vendor cost was too high for LOT 2		LOT 1 & LOT 2 bids are unreasonable. Contract will only be awarded for LOT 3 - General Maintenance.		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)	
<b>Documented past experience and performance (up to 15 points)</b>	15		10		10		15		15	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	10 years in business servicing several city agencies, with over 10 plus completed projects.		Years in business - 6; Three (3) active contracts. Past projects include working with housing authority residents; relocation services.		Experience is based on performance at HACA properties.		Long-standing vendor with great performance, however bids do not in-line with the scope of work.		Current vendor; preferred based on service.	
<b>Staff Qualifications and Experience (up to 15 points)</b>	15		10		10		15		15	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Resume submissions for all supervising staff with notable experience included on each.		Past contract services include a mix of cleaning ISD locations and city buildings. Currently servicing 4 locations.		Unable to locate in proposal. Points issued based on staff feedback regarding performance.		Unity Contractor is a long standing vendor with the agency with a great track record regarding experience and performance. However, cost does not align with scope as noted on bids		Trevino - 35 years of experience in cleaning service industry. Years of experience serving HACA properties.	
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>	10		10		10		10		10	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small, minority, and woman-owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	
<b>TOTAL</b>	<b>99</b>		<b>90</b>		<b>75</b>		<b>65</b>		<b>90</b>	

RECOMMENDED AGENCY | LOT 1 - M&R Elite, We DO It All, Trevino Contractor, Corza Construction, Davis Moving & Cleaning. LOT 2 - Trevino, Corza, Davis. LOT 3 - We Do It All, Unity, Corza, Davis.

EVALUATOR Crystal James 01/29/2026  
 First & Last Name Date

Evaluation	Vendor #1	Vendor #2	Vendor #3	Vendor #4	Vendor #5
Criteria	Corza Construction	Davis Moving & Cleaning	We Do It All, LLC.	Unity Contractor	Trevino Contractor
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	20	30	25	20	30
	<b>Comments</b> The proposal outlines a process for monitoring service to completion. Leads, supervisors, and checklist for 4 member crews.	<b>Comments</b> Plan proposal was detail and focuses on monitoring services, service quality, and quality controls in place. The staffing outline is reasonable to meet the needs of the contract to ensure completion.	<b>Comments</b> Current vendor servicing Thurmond, Northgate, and Coronado Hills. Advised with onsite staff regarding progress; happy with service.	<b>Comments</b> N/A - Understands the scope of work, however over bid the project.	<b>Comments</b> Current vendor; preferred at several sites.
<b>Cost Effectiv(up to 30 points)</b>		30	20	10	20
	<b>Comments</b>	<b>Comments</b> Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.	<b>Comments</b> Reasonable prices for service for LOT 1 - Cleaning and LOT 3 - General Maintennace repairs; meets budget. Vendor cost was too high for LOT 2	<b>Comments</b> N/A - Over bid the project for LOT 1 and LOT 2; LOT 3 accepted.	<b>Comments</b> Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)
<b>Documented past experience and performance (up to 15 points)</b>	20	13	10	15	10
	<b>Comments</b> Acceptable past experience and performance. Understands cleaning services, but no experience with vacancies.	<b>Comments</b> Years in business - 6; Three (3) active contracts. Past projects include working with housing authority residents; relocation services.	<b>Comments</b> Established 3 years ago; Past experience limited to services complete at 3 HACA properties.	<b>Comments</b> N/A - Over bid the project.	<b>Comments</b> Current vendor; preferred based on service.
<b>Staff Qualifications and Experience (up to 15 points)</b>	15	10	10	15	15
	<b>Comments</b> Outline safety training; Staff resumes include years of experience both within and outside Corza Construction.	<b>Comments</b> While past contract experience was present, staff training and specific qualifications were not clear.	<b>Comments</b> Unclear where this is disclosed in proposal. Credit given for current vendor service performance.	<b>Comments</b> Known vendor with a long-standing record of performance.	<b>Comments</b> Owner industry experience - 35yrs. long standing vendor serving HACA properties.
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>		10	10	10	10
	<b>Comments</b> Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	<b>Comments</b> Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	<b>Comments</b> Yes - HUD Form 5369-C notes the vendor elect small, minority, and woman-owned business.	<b>Comments</b> Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	<b>Comments</b> Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.
<b>TOTAL</b>	<b>55</b>	<b>93</b>	<b>75</b>	<b>70</b>	<b>85</b>

RECOMMENDED AGENCY | LOT 1 - M&R Elite, We DO It All, Trevino Contractor, Corza Construction, Davis Moving & Cleaning. LOT 2 - Trevino, Corza, Davis. LOT 3 - We Do It All, Unity, Corza, Davis.

EVALUATOR | Michael Roth | 02/02/2026  
 First & Last Name | Date

Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	29		29		30		30		30	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Demonstared plan is reasonable to assume vendors understanding of the scope associated with the RFP.		Vendor presented a management plan and demonsttraited capacity to handle the project. 1 Project Manager; 1 onsite Supervisor, 6 Cleaners, 3 Part-time cleaners (as needed), 2 painters		I didn't see a proposed plan as to how the company plans to manage capacity, but I can see that the company is a current vendor with good feedback from staff.		Current vendor at HACA properties; understands the work needed.		Current vendor; preferred at several PAMI sites due to fast service and known standards.	
<b>Cost Effectiv(up to 30 points)</b>	30		29		22		10		30	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
			Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning and LOT 3 - General Maintennace repairs. Vendor cost was too high for LOT 2		LOT 1 & LOT 2 are not reasonable in cost. LOT 3 will be rewarded.		Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)	
<b>Documented past experience and performance (up to 15 points)</b>	15		15		14		15		15	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Vendor past experience documents notable contracts with city and government agencies. References included.		Years in business - 6; Three (3) active contracts. Past projects include working with housing authority residents; relocation services.		New vendor; 3 years old. Past experience is limited to current HACA projects, including Thurmond, Northgate, and Coronado.		Great vendor and performance; however out of budget for Cleaning and Painting services.		Current vendor; preferred based on service.	
<b>Staff Qualifications and Experience (up to 15 points)</b>	15		13		15		15		12	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Company qualifications and work experience submitted with the inclusion of team resumes noting individual experience levels.		Cleaning contrats noting experience present; staff quaifications remain unknown.		Current vendor; Experience evaluated by staff at contracted sites.		Included however experience is known; just not cost efficient.		Qualified and experience serving HACA properties and past record servicing other housing agencies.	
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>	10		10		10		10		10	
	<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>		<b>Comments</b>	
	Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small, minority, and woman-owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.		Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	
<b>TOTAL</b>	<b>99</b>		<b>96</b>		<b>91</b>		<b>80</b>		<b>97</b>	

RECOMMENDED AGENCY | LOT 1 - M&R Elite, We DO It All, Trevino Contractor, Corza Construction, Davis Moving & Cleaning. LOT 2 - Trevino, Corza, Davis. LOT 3 - We Do It All, Unity, Corza, Davis.

EVALUATOR Frank Garcia 01/29/2026  
 First & Last Name Date

Evaluation	Vendor #1		Vendor #2		Vendor #3		Vendor #4		Vendor #5	
Criteria	Corza Construction		Davis Moving & Cleaning		We Do It All, LLC.		Unity Contractor		Trevino Contractor	
<b>Proposed plan and demonstrated capability to provide the services requested in the proposal (up to 30 Points)</b>	Comments		Comments		Comments		Comments		Comments	
			Yes - Vendor included measures such as quality control procedures, onsite monitoring, and post service evaluations.						Yes - Demonstrated as seen in current performance. Current preferred vendor	
<b>Cost Effectiv(up to 30 points)</b>	Comments		Comments		Comments		Comments		20 Comments	
			Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, and LOT 3 - General Maintennace repairs.						Cost effective; reasonable prices that meet property budgets for LOT 1 - Cleaning, LOT 2 - Painting, but not LOT 3 - General Maintennace repairs (not awarded LOT 3)	
<b>Documented past experience and performance (up to 15 points)</b>	Comments		Comments		Comments		Comments		Comments	
			Experience - 6 years; multiple contracts complete including both cleaning and moving services. Returning vendor						Current vendor; preferred based on service.	
<b>Staff Qualifications and Experience (up to 15 points)</b>	Comments		Comments		Comments		Comments		Comments	
			Staff qualifications and individual experieince is not in the proposal.						Current vendor; preferred based on current and past contract service.	
<b>Minority/Woman-Owned Business Enterprise (MWBE) (up to 10 points)</b>	Comments		10 Comments		Comments		Comments		10 Comments	
			Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.						Yes - HUD Form 5369-C notes the vendor elect small & minority owned business.	
<b>TOTAL</b>	<b>0</b>		<b>10</b>		<b>0</b>		<b>0</b>		<b>30</b>	

RECOMMENDED AGENCY

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EVALUATOR

First & Last Name

Date



# HOUSING AUTHORITY OF THE CITY OF AUSTIN

## BOARD ACTION REQUEST

### Operations ITEM 3.

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**MEETING DATE:** February 19, 2026  
**STAFF CONTACT:** Nora Velasco, Director of Operations & Procurement  
**ITEM TITLE:** Presentation, Discussion, and Possible Action regarding Resolution No. 02934: Approval of multiple Vendor Contracts for Integrated Pest Management at all HACA properties including administration and lease offices  
**BUDGETED ITEM:** **Yes**  
**TOTAL COST:** **TOTAL COST \$173,737.5**

### ACTION

The Board is being asked to authorize the award of two contracts to provide Integrated Pest Management Services at all HACA properties to the following vendors:

Heat Wave Pest Control \$ 90,750.00

Oliver Termite & Pest Control \$ 82,987.50

### SUMMARY

#### Background:

The U.S. Department of Housing and Urban Development's (HUD) Model Lease requires owners to provide extermination services, as needed. Subsequent guidance from HUD (Housing Notice 2012-5 and a Memorandum clarifying that same notice) urges properties to have an Integrated Pest Management (IPM) plan "including resident education regarding housekeeping, cleanliness, acceptable furniture, unit inspection, and identification of bed bugs." The guidance also urges properties to have a regular, proactive inspection program for early detection.

The pest management landscape continues to change and evolve. New laws have restricted the use of certain treatments. Various insects and pests have developed resistance to certain chemicals. New forms of pest control treatments are found to be successful. To ensure that we are meeting our responsibility to provide safe, decent and sanitary housing to residents, it is important for HACA to conduct a regular review of pest management services and consider

different approaches.

**Process:**

On November 19, 2025, HACA issued a Request for Proposals (RFP) for integrated Pest Management Services HACA-25-P-0263. The RFP was advertised in the Austin American Statesman (10/19/25) and (10/26/25), on HACA’S website, and on the online bidding service Housing Agency Marketplace. 148 vendors were notified, 17 vendors downloaded the proposal and three responses were received.

A three-person evaluation committee reviewed the proposals and recommended awarding contracts to two contractors and disqualifying the 3rd response due to the non-responsive and high bid.

Two of the responses are considered for award for the following reasons:

1. Different building types (high-rise tower, duplexes, row houses, single-family home) need different approaches to integrated pest management to be successful.
2. Using two qualified vendors with different approaches gives HACA the opportunity to evaluate what works best for each property type.
3. The two selected vendors each demonstrated experience working in affordable housing settings, knowledge of multiple approaches to IPM, and capacity to handle the volume of work requested of each.
4. Having two vendors allows HACA to quickly address problems at each property depending on the need. Both vendor selections not only have previous positive HACA experience, they each have unique expertise in different types of infestations and methods of treatment.

**Staff Recommendation:**

After completing this evaluation, staff recommends the approval to award the Integrated Pest Management Services contracts to Oliver Termite and Pest Control and Heat Wave Bed Bug Control. Each contractor will be assigned different properties based on the contractor’s expertise and services provided. The list of recommended properties for each vendor is included as an attachment. Both contractors will work together based on each property’s needs and requirements.

**ATTACHMENTS:**

TABULATIONS.PEST.CONTROL.HACA-35-P.0263, BID.PROPOSAL.FORM.HEATWAVE, BID.PROPOSAL.FORM.OLIVER, STATEMENT.OF.QUALIFICATIONS.HEATWAVE, STATEMENT.OF.QUALIFICATIONS.OLIVER, Evaluation Pest Control 0263 (1).frank.g, Evaluation Pest Control 0263 (1).tamika, Evaluation Pest Control 0263 (1).crysta.j

**RESOLUTION NO. 02934**  
**APPROVAL OF MULTIPLE VENDOR CONTRACTS FOR INTEGRATED PEST**  
**MANAGEMENT SERVICES**

**WHEREAS**, the U.S. Department of Housing and Urban Development requires property owners to provide Integrated Pest Management services; and

**WHEREAS**, the Housing Authority of the City of Austin (HACA) recognizes the need to stay current on changing pest control treatment options to best meet the needs of all our property and building types; and

**WHEREAS**, on October 19, 2025, HACA issued a request for proposals for Integrated Pest Management services and reviewed all proposals received; and

**WHEREAS**, HACA reserves its right to award contracts to multiple vendors to better meet the needs of each property; and

**WHEREAS**, it is the recommendation to award the monthly service contracts totaling not to exceed \$173,737,50 to two vendors with distribution as follows:

1. \$ 90,750.00 to Heat Wave Pest Control: to provide services at Pathways at Salina, Pathways at Lakeside, Pathways at Gaston, Pathways Northloop, Pathways Manchaca II, Pathways at Manchaca Village.
2. \$ 82,987.50 to Oliver Termite & Pest Control Inc to provide services at Pathways at Booker T. Washington, Pathways at Meadowbrook, Pathways Bouldin Oaks, Pathways at Thurmond Heights, Pathways Georgian Manor, Pathways at Northgate, Pathways at Coronado Hills, Pathways at Shadowbend Ridge, 1124 S IH 35, 1100 S IH 35, 205 Chicon St, 1503 S IH 35, and 1507 S IH 35.

**WHEREAS**, the contracts with each vendor will be reviewed annually or as needed to amend, with renewals at three percent, not to exceed five years.

**NOW, THEREFORE, IT IS HEREBY RESOLVED**, that the Housing Authority of the City of Austin Board of Commissioners authorizes the President & CEO to accept the proposals as submitted by Oliver Termite and Pest Control and Heat Wave, LLC and award such contracts.

**PASSED, APPROVED AND ADOPTED** this 19th day of February, 2026.

\_\_\_\_\_  
Michael G. Gerber, Secretary

\_\_\_\_\_  
Carl S. Richie, Jr., Chairperson

**INTEGRATED PEST MANAGEMENT  
PAMI-25-P-0263**

**HOUSING AUTHORITY OF THE CITY OF AUSTIN  
1124 South IH-35  
Austin, TX 78704**

**Vendor #1a  
Heatwave Pest Control  
(Tier 2 Pricing)**

**Vendor #1b  
Heatwave Pest Control  
(Tier 3 Pricing)**

**Vendor #2  
Oliver Termite & Pest  
Control**

**Vendor #3  
Sunshine Eco Services**

**Commercial Properties**

	<b>Address</b>	<b>Sq. Feet</b>	<b>Rate Per Treatment</b>	<b>Rate Per Treatment</b>	<b>Rate Per Treatment</b>	<b>Rate Per Treatment</b>
HACA	1124 South IH-35	113,373	\$ no bid	\$ no bid	\$ 475.00 per month	\$ 56,686.00 per month
HACA	1100 South IH-35	4,000	\$ no bid	\$ no bid	\$ 85.00 per month	\$ 2,000.00 per month
HACA	205 Chicon Street	4,700	\$ no bid	\$ no bid	\$ 85.00 per month	\$ 2,350.00 per month
HACA	1507 South IH-35	9,547	\$ no bid	\$ no bid	\$ 115.00 per month	\$ 4,773.00 per month
HACA	1503 South IH-35	2,198	\$ no bid	\$ no bid	\$ 75.00 per month	\$ 1,099.00 per month
					\$ 835.00 per month	\$ 66,908.00 per month

**Residential Properties**

	<b>Address</b>	<b>Units</b>	<b>Rate Per Treatment</b>	<b>Rate Per Treatment</b>	<b>Rate Per Treatment</b>	<b>Rate Per Treatment</b>
AMP-04	1201 West Live Oak	160	\$ 1,320.00 per month	\$ 1,825.00 per month	\$ 840.00 per month	\$ 2,400.00 per month
AMP-05/06	905 Bedford	216	\$ 1,595.00 per month	\$ 2,285.00 per month	\$ 1,026.00 per month	\$ 3,240.00 per month
AMP-07	85 Trinity Street	164	\$ 1,455.00 per month	\$ 1,825.00 per month	\$ 865.00 per month	\$ 2,460.00 per month
AMP-08	1143 Salina	32	\$ 495.00 per month	\$ 585.00 per month	\$ 325.00 per month	\$ 480.00 per month
AMP-09	1941 Gaston Place	100	\$ 945.00 per month	\$ 1,575.00 per month	\$ 525.00 per month	\$ 1,500.00 per month
AMP-10	1203 Cumberland	144	\$ 1,125.00 per month	\$ 1,745.00 per month	\$ 695.00 per month	\$ 2,160.00 per month
AMP-11	8426 Goldfinch	144	\$ 1,125.00 per month	\$ 1,745.00 per month	\$ 695.00 per month	\$ 2,160.00 per month
AMP-12	110 Boles	94	\$ 925.00 per month	\$ 1,450.00 per month	\$ 525.00 per month	\$ 1,410.00 per month
AMP-15	2300 West Northloop	50	\$ 995.00 per month	\$ 1,500.00 per month	\$ 385.00 per month	\$ 1,950.00 per month
AMP-16	9120 North Gate Blvd	50	\$ 675.00 per month	\$ 925.00 per month	\$ 385.00 per month	\$ 750.00 per month
AMP-17	6328 Shadowbend	50	\$ 675.00 per month	\$ 925.00 per month	\$ 385.00 per month	\$ 750.00 per month
AMP-18	6328 Buffalo Pass	33	\$ 515.00 per month	\$ 695.00 per month	\$ 325.00 per month	\$ 495.00 per month
AMP-19	3628 Manchaca	33	\$ 515.00 per month	\$ 695.00 per month	\$ 325.00 per month	\$ 495.00 per month
AMP-22	1438 Coronado	48	\$ 655.00 per month	\$ 925.00 per month	\$ 375.00 per month	\$ 720.00 per month
			\$ 13,015.00 per month	\$ 18,700.00 per month	\$ 7,676.00 per month	\$ 20,970.00 per month

Bid Official: Nora Velasco

Date: 11/19/2025

Official Witness: [Signature]

Date: 11/19/2025

**INTEGRATED PEST MANAGEMENT  
PAMI-25-P-0263**

**HOUSING AUTHORITY OF THE CITY OF AUSTIN  
1124 South IH-35  
Austin, TX 78704**

<b>Vendor #1a</b>	<b>Vendor #1b</b>	<b>Vendor #2</b>	<b>Vendor #3</b>
Heatwave Pest Control (Tier 2 Pricing)	Heatwave Pest Control (Tier 3 Pricing)	Oliver Termite & Pest Control	Sunshine Eco Services

**BID PROPOSAL  
LOT 2**

**BED BUG REMEDIATION (NON-THERMAL)**

<b>Bed Bug Treatment</b>	<b>Per Incident</b>	<b>Per Incident</b>	<b>Per Incident</b>	<b>Per Incident</b>
0 Bedroom	\$ 155.00	no add'l cost	\$ 595.00	\$ 125.00
1 Bedroom	\$ 155.00	no add'l cost	\$ 695.00	\$ 175.00
2 Bedroom	\$ 155.00	no add'l cost	\$ 795.00	\$ 350.00
3 Bedroom	\$ 155.00	no add'l cost	\$ 895.00	\$ 525.00
4 Bedroom	\$ 155.00	no add'l cost	\$ 995.00	\$ 700.00
5 Bedroom	\$ 155.00	no add'l cost	\$ 1,095.00	\$ 875.00

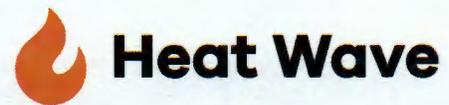
**BID PROPOSAL  
LOT 3**

**BED BUG REMEDIATION (THERMAL)**

<b>Bed Bug Treatment</b>	<b>Per Incident</b>	<b>Per Incident</b>	<b>Per Incident</b>	<b>Per Incident</b>
0 Bedroom	\$ 699.00	no add'l cost	\$ N/A	\$ N/A
1 Bedroom	\$ 799.00	no add'l cost	\$ N/A	\$ N/A
2 Bedroom	\$ 899.00	no add'l cost	\$ N/A	\$ N/A
3 Bedroom	\$ 949.00	no add'l cost	\$ N/A	\$ N/A
4 Bedroom	\$ 999.00	no add'l cost	\$ N/A	\$ N/A
5 Bedroom	\$ 1,199.00	no add'l cost	\$ N/A	\$ N/A

Bid Official: Nora Velasco Date: 11/19/2025

Official Witness: [Signature] Date: 11/19/2025



**Housing Authority of the City of Austin  
Purchasing Department  
1124 South IH-35  
Austin, Texas 78704**

**Project # HACA-25-P-0236 – Integrated Pest Management Services**

Dear HACA Purchasing Department,

Thank you very much for the opportunity to respond to your RFP and to continue providing comprehensive IPM services for your communities in the great city of Austin, Texas. In addition to the packet below, we hope that you will consider this brief cover letter.

Heat Wave Pest Control has been proudly serving the Austin community since 2014. We provide IPM services exclusively to multi-family communities both public and private, with a specialty in bed bug remediation (thermal and chemical).

Our team has been providing IPM services to several HACA communities for more than 5 years. We hope to continue that relationship as well as to expand upon it by providing the same high-quality, high-value services to your other residential communities.

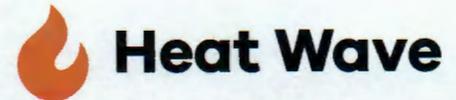
Throughout our tenure servicing HACA and its resident communities, we have gone above and beyond to ensure the residents and staff are treated respectfully and receive the highest quality service possible. **This includes helping navigate numerous HUD inspections over the years, and we are very pleased that we were able to assist your communities in passing those inspections with flying colors.**

**The all-inclusive packages that we offer include a variety of services that are critical to your communities to avoid project-based charges to the greatest extent possible while keeping overall prices low.** Our response reflects a continuation of that approach.

If there is any additional information you need to consider our proposal, please do not hesitate to contact me any time at [patrick@heatwavepest.com](mailto:patrick@heatwavepest.com) or 512.586.1670.

Thanks,

Patrick Courtney  
President, Heat Wave Pest Control



**Lot 1 Addendum:  
Tiered Pricing Information (all properties)**

Thank you again for the opportunity to submit this proposal.

We understand HACA’s unique needs and challenges, which is why we’ve developed a tiered and comprehensive (nearly all-inclusive) pricing plan specifically for HACA properties. We have been providing services according to this plan for more than 5 years and it has worked extremely well for HACA residents and communities and helps to keep overall pest control spending low.

The base monthly prices by property are listed below with both pricing packages offered:

Property Name	Units	Tier 2 Price	Tier 3 Price
Meadowbrook	160	\$1,320.00	\$1,825.00
Booker T. Washington	216	\$1,595.00	\$2,285.00
Lakeside Apartments	164	\$1,455.00	\$1,825.00
Salinas Apartments	32	\$495.00	\$585.00
Gaston Place Apartments	100	\$945.00	\$1,575.00
Bouldin Oaks	144	\$1,125.00	\$1,745.00
Thurmond Heights Apartments	144	\$1,125.00	\$1,745.00
Georgian Manor	94	\$925.00	\$1,450.00
North Loop	130	\$995.00	\$1,500.00
Northgate	50	\$675.00	\$925.00
Shadowbend Ridge	50	\$675.00	\$925.00
Manchaca II	33	\$515.00	\$695.00
Manchaca Village	33	\$515.00	\$695.00
Coronado Hills Apartments	48	\$655.00	\$925.00

Here is a breakdown of what is included in the Tier 2 package:

1. **Full Property Treatments and Inspections.** Service includes recurring full-property inspections and treatments to ensure that **every single unit** (vacant and occupied) is properly

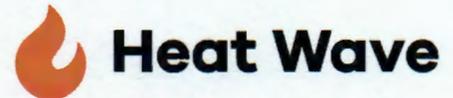
assessed and treated on a regular cadence. This includes all vacant units **prior** to move in and all exiting units when their residents give notice of vacating. Property visits and treatments occur **every single week** to ensure that treatment and inspections stay on a regular cadence.

2. **Real Time Tracking.** All data for property inspections, treatments, etc. is recorded on a cloud-based system and accessible through online tracking sheets available to HACA staff. These sheets provide all critical data with 24/7 access and allow staff to view and download all data needed for regular operations as well as regulatory inspections (e.g., HUD). An example tracking sheet is located at this [link](#). Please note that **ALL** data from inspections and treatments since the beginning of our work for HACA is available at all times. Tracking all the data in this way lets our team effectively identify repeat issues, conducive units, trends over time, etc.
3. **Included Pest Treatments.** Regular pest control treatments will control for all of the following pests. Please note this is not a comprehensive list: roaches (all types), box elder bugs, centipedes, crickets, earwigs, firebrats ground beetles, Indian meal moths, mice, millipedes, Norway rats, pill bugs, roof rats, scorpions, silverfish, spiders, sow bugs, sugar ants.
4. **Nearly All Specialty Treatments Included.** The weekly visits include service for all of the above pests on a regular schedule and include a variety of services which are normally priced on a per-treatment basis for other clients. This includes, but is not limited to, roach clean outs (normally \$99 per service). The Tier 2 package does **not** include bed bug thermal or chemical treatments in the base price, but such treatments are available at preferred rates for Tier 2 clients; see Lot 2 and Lot 3 for details.
5. **Quarterly Exterior Treatments.** This helps to control exterior pest issues, such as ants and American roaches, from making their way inside the building. We use the latest and most effective general barrier products, including Bifen and Intice exterior products.
6. **Dedicated technicians.** The technicians we use to service HACA properties are dedicated to those communities and know them well and receive special training to ensure property handling of issues on site. This ensures continuity of service for HACA staff and residents.
7. **Constant Communication.** Our team of customer support, operations, and technician specialists are available via email, phone, and text for fast and effective communication.
8. **Annual Inspections.** Comprehensive annual inspection and report as a backstop to ensure that there are no lingering or problematic issues that have not been fully addressed during the regular cadence of weekly visits to the property.

The Tier 3 package (the package currently in place for all 4 HACA properties we service) includes **all** of the above items **plus** the following:

1. **Chemical Bed Bug Treatments.** Chemical bed bug treatments are included as needed for all Tier 3 properties at no additional cost
2. **Thermal Bed Bug Treatments.** Thermal bed bug treatments are included as needed for all Tier 3 properties at no additional cost; provided, however, that such treatments are limited to two times during any twelve month period for each individual unit. Some restrictions apply. The cancellation fee for any thermal bed bug treatment cancelled with fewer than 48 hours' notice is \$350.00 regardless of unit size.

If there is any additional information you need to consider our proposal, please do not hesitate to contact me any time at [patrick@heatwavepest.com](mailto:patrick@heatwavepest.com) or 512.586.1670.



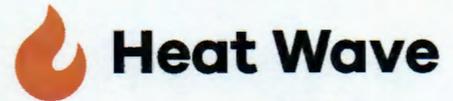
**Lot 2 Addendum:  
Chemical Bed Bug Treatment Pricing (all properties)**

Thank you again for the opportunity to submit this proposal.

We understand HACA's unique needs and challenges, which is why we've developed a tiered and comprehensive (nearly all-inclusive) pricing plan specifically for HACA properties. We have been providing services according to this plan for more than 5 years and it has worked extremely well for HACA residents and communities and helps to keep overall pest control spending low.

All the Tier 3 properties include chemical bed bug treatments at **no additional cost**.  
For all Tier 2 properties, the chemical bed bug treatment cost is **\$155.00 per treatment** (one hundred fifty-five dollars) **regardless of unit size**.

If there is any additional information you need to consider our proposal, please do not hesitate to contact me any time at [patrick@heatwavepest.com](mailto:patrick@heatwavepest.com) or 512.586.1670.



**Lot 3 Addendum:  
Thermal Bed Bug Treatment Pricing (all properties)**

Thank you again for the opportunity to submit this proposal.

We understand HACA's unique needs and challenges, which is why we've developed a tiered and comprehensive (nearly all-inclusive) pricing plan specifically for HACA properties. We have been providing services according to this plan for more than 5 years and it has worked extremely well for HACA residents and communities and helps to keep overall pest control spending low.

All the Tier 3 properties include a certain number of thermal bed bug treatments at **no additional cost**.

For all Tier 2 properties and for all thermal bed bug treatments at Tier 3 properties over their allocation, the unit cost for thermal bud bug treatments is listed below:

0 Bedroom: \$699.00  
1 Bedroom: \$799.00  
2 Bedroom: \$899.00  
3 Bedroom: \$949.00  
4 Bedroom: \$999.00  
5 Bedroom: \$1,199.00

The cancellation fee for any thermal bed bug treatment cancelled with fewer than 48 hours' notice is \$350.00 regardless of unit size.

If there is any additional information you need to consider our proposal, please do not hesitate to contact me any time at [patrick@heatwavepest.com](mailto:patrick@heatwavepest.com) or 512.586.1670.



**Lot 4 Addendum:  
Other Services Costs**

Thank you again for the opportunity to submit this proposal.

We understand HACA’s unique needs and challenges, which is why we’ve developed a tiered and comprehensive (nearly all-inclusive) pricing plan specifically for HACA properties. We have been providing services according to this plan for more than 5 years and it has worked extremely well for HACA residents and communities and helps to keep overall pest control spending low.

Please see the following supplemental information for Lot 4:

**Exterior Rodent Control.** Rodent bait boxes are available at a total cost of \$22.50/box installed (in which case the boxes are HACA property forever) as well as \$2.00/month per box for monitoring and refill costs for the bait boxes.

**Termite Inspections.** Heat Wave Pest Control provides one-off termite inspections at a cost of \$499.00 per property.

**Termite Program (Annual)**

Heat Wave Pest Control offers an annual termite program. This program (often referred to in the industry as a “termite bond”) includes an initial inspection to assess the property for termite issues. If no termite issues are found, the annual program cost covers **any** termite issues that may emerge during the subsequent 12 months (1 year) at no additional cost. If termite issues are found during the initial program inspection, Heat Wave Pest Control will provide a bid for any necessary remediation work on a project basis. Participation in the annual termite program is optional.

The base flat rate prices cover participation in the Annual Termite Program

Property Name	Units	Annual Termite Program Price
Meadowbrook	160	\$2,295.00
Booker T. Washington	216	\$2,495.00
Lakeside Apartments	164	\$2,295.00
Salinas Apartments	32	\$1,195.00
Gaston Place Apartments	100	\$1,895.00
Bouldin Oaks	144	\$2,195.00
Thurmond Heights Apartments	144	\$2,195.00

Georgian Manor	94	\$1,895.00
North Loop	130	\$2,195.00
Northgate	50	\$1,395.00
Shadowbend Ridge	50	\$1,395.00
Manchaca II	33	\$1,195.00
Manchaca Village	33	\$1,195.00
Coronado Hills Apartments	48	\$1,395.00

If there is any additional information you need to consider our proposal, please do not hesitate to contact me any time at [patrick@heatwavepest.com](mailto:patrick@heatwavepest.com) or 512.586.1670.

HOUSING AUTHORITY  
 OF THE CITY OF AUSTIN  
 Purchasing Department  
 1124 South IH-35  
 Austin, TX 78704

PROJECT # HACA-25-P-0236 -- Lot 1  
 INTEGRATED PEST  
 MANAGEMENT SERVICES

**BID PROPOSAL  
 LOT 1**

Having carefully examined the bid packet for the above referenced Project, for the Owner, the Housing Authority of the City of Austin, as well as the premises and conditions affecting this work and all other contract documents, I propose to furnish all labor, equipment, and materials necessary to complete the work as follows:

**Note:** Amounts shown shall be shown as both figure and written forms. In case of discrepancy between the written amount and the figure, the written amount will govern.

**Example:** \$123.45 per MONTH (One Hundred Twenty-Three Dollars and Forty-Five Cents per MONTH)

Commercial Properties			
	Address	Sq. Feet	Rate Per Treatment
HACA	Administration Building -- Main 1124 South IH-35 Austin TX, 78704	113,373	\$ _____
HACA	1100 South IH-35 Austin TX, 78704	4,000	\$ _____
HACA	205 Chicon Street Austin TX, 78702	4,700	\$ _____
HACA	1507 South IH-35 Austin TX, 78741	9,547	\$ _____
HACA	1503 South IH-35 Austin TX, 78741	2,198	\$ _____

Residential Properties			
	Address	Units	Rate Per Treatment
AMP-04	Meadowbrook Apartments & Mainspring Daycare Austin TX, 78704	160	\$ See attached Lot 1 Addendum; Tiered Pricing
AMP-05/06	Booker T. Washington 905 Bedford Austin TX, 78702	216	\$ See attached Lot 1 Addendum; Tiered Pricing
AMP-07	Lakeside Apartments 85 Trinity Street Austin TX, 78704	164	\$ See attached Lot 1 Addendum; Tiered Pricing

**Residential Properties**

	<b>Address</b>	<b>Units</b>	<b>Rate Per Treatment</b>
AMP-08	Salina Apartments 1143 Salina Austin TX, 78702	32	\$ <u>See attached Lot 1 Addendum; Tiered Pricing</u>
AMP-09	Gaston Place 1941 Gaston Place Austin TX, 78723	100	\$ <u>See attached Lot 1 Addendum; Tiered Pricing</u>
AMP-10	Bouldin Oaks 1203 Cumberland Austin TX, 78704	144	\$ <u>See attached Lot 1 Addendum; Tiered Pricing</u>
AMP-11	Thurmond Heights 8426 Goldfinch Austin TX, 78758	144	\$ <u>See attached Lot 1 Addendum; Tiered Pricing</u>
AMP-12	Georgian Manor 110 Boles Austin TX, 78753	94	\$ <u>See attached Lot 1 Addendum; Tiered Pricing</u>
AMP-15	Northloop Apartments 2300 West Northloop Austin TX, 78756	50	\$ <u>See attached Lot 1 Addendum; Tiered Pricing</u>
AMP-16	Northgate Apartments 9120 North Gate Blvd Austin TX, 78758	50	\$ <u>See attached Lot 1 Addendum; Tiered Pricing</u>
AMP-17	Shadowbend Ridge 6328 Shadowbend Austin TX, 78745	50	\$ <u>See attached Lot 1 Addendum; Tiered Pricing</u>
AMP-18	Manchaca II 6328 Buffalo Pass Austin TX, 78745	33	\$ <u>See attached Lot 1 Addendum; Tiered Pricing</u>
AMP-19	Manchaca Village 3628 Manchaca Austin TX, 78704	33	\$ <u>See attached Lot 1 Addendum; Tiered Pricing</u>
AMP-22	Coronado Hills 1438 Coronado Austin TX, 78752	48	\$ <u>See attached Lot 1 Addendum; Tiered Pricing</u>

Bidder acknowledges receipt of the following addenda:

Number 1 (Lot 1 Addendum)  
 Number \_\_\_\_\_  
 Number \_\_\_\_\_

Annual renewal percentage increase 3.0%

**Respectfully Submitted of:**

Company Name: Heat Wave Pest Control

Contact name: Patrick Courtney (patrick@heatwavepest.com)

HOUSING AUTHORITY  
 OF THE CITY OF AUSTIN  
 Purchasing Department  
 1124 South IH-35  
 Austin, TX 78704

PROJECT # HACA-25-P-0236-- Lot 2  
 BED BUG REMEDIATION  
 (NON-THERMAL)

**BID PROPOSAL**  
**LOT 2**

Having carefully examined the bid packet for the above referenced Project, for the Owner, the Housing Authority of the City of Austin, as well as the premises and conditions affecting this work and all other contract documents, I propose to furnish all labor, equipment, and materials necessary to complete the work as follows:

**Note:** Amounts shown shall be shown as both figure and written forms. In case of discrepancy between the  
**Example:** \$123.45 per MONTH (One Hundred Twenty-Three Dollars and Forty-Five Cents per MONTH)

<b>Bed Bug Treatment</b>	<b>Per Incident</b>
0 Bedroom	\$ <u>See attached Lot 2 Addendum; Tiered Pricing</u>
1 Bedroom	\$ <u>See attached Lot 2 Addendum; Tiered Pricing</u>
2 Bedroom	\$ <u>See attached Lot 2 Addendum; Tiered Pricing</u>
3 Bedroom	\$ <u>See attached Lot 2 Addendum; Tiered Pricing</u>
4 Bedroom	\$ <u>See attached Lot 2 Addendum; Tiered Pricing</u>
5 Bedroom	\$ <u>See attached Lot 2 Addendum; Tiered Pricing</u>

Bidder acknowledges receipt of the following addenda:

Number 1 (Lot 2 Addendum)  
 Number \_\_\_\_\_  
 Number \_\_\_\_\_

Annual renewal percentage increase 3.0%  
**Respectfully Submitted of:**

Company Name: Heat Wave Pest Control

Contact Name: Patrick Courtney (patrick@heatwavepest.com)

\_\_\_\_\_

\_\_\_\_\_

HOUSING AUTHORITY  
 OF THE CITY OF AUSTIN  
 Purchasing Department  
 1124 South IH-35  
 Austin, TX 78704

PROJECT # HACA-25-P-0236-- Lot 3  
 BED BUG REMEDIATION  
 (THERMAL)

**BID PROPOSAL  
 LOT 3**

Having carefully examined the bid packet for the above referenced Project, for the Owner, the Housing Authority of the City of Austin, as well as the premises and conditions affecting this work and all other contract documents, I propose to furnish all labor, equipment, and materials necessary to complete the work as follows:

**Note:** Amounts shown shall be shown as both figure and written forms. In case of discrepancy between the  
**Example:** \$123.45 per MONTH (One Hundred Twenty-Three Dollars and Forty-Five Cents per MONTH)

<b>Bed Bug Treatment</b>	<b>Per Incident</b>
0 Bedroom	\$ <u>See attached Lot 3 Addendum; Tiered Pricing</u>
1 Bedroom	\$ <u>See attached Lot 3 Addendum; Tiered Pricing</u>
2 Bedroom	\$ <u>See attached Lot 3 Addendum; Tiered Pricing</u>
3 Bedroom	\$ <u>See attached Lot 3 Addendum; Tiered Pricing</u>
4 Bedroom	\$ <u>See attached Lot 3 Addendum; Tiered Pricing</u>
5 Bedroom	\$ <u>See attached Lot 3 Addendum; Tiered Pricing</u>

Bidder acknowledges receipt of the following addenda:

Number 1 (Lot 3 Addendum)  
 Number \_\_\_\_\_  
 Number \_\_\_\_\_

Annual renewal percentage increase 3.0%  
**Respectfully Submitted of:**

Company Name: Heat Wave Pest Control

Contact Name: Patrick Courtney (patrick@heatwavepest.com)

\_\_\_\_\_  
 \_\_\_\_\_

HOUSING AUTHORITY  
 OF THE CITY OF AUSTIN  
 Purchasing Department  
 1124 South IH-35  
 Austin, TX 78704

PROJECT # HACA-25-P-0236-- Lot 4  
 OTHER EXTERMINATION SERVICES  
 PROVIDED "AS NEEDED"

**BID PROPOSAL  
 LOT 4**

Having carefully examined the bid packet for the above referenced Project, for the Owner, the Housing Authority of the City of Austin, as well as the premises and conditions affecting this work and all other contract documents, I propose to furnish all labor, equipment, and materials necessary to complete the work as follows:

**Note:** Amounts shown shall be shown as both figure and written forms. In case of discrepancy between the written amount and the figure, the written amount will govern.

**Example:** \$123.45 per MONTH (One Hundred Twenty-Three Dollars and Forty-Five Cents per MONTH)

**Additional Services**

	<b>Rate Per Treatment</b>
Flea treatment service call (Interior)	\$ <u>See attached Lot 4 Addendum for details</u>
Wasp/yellow jacket Treatment (Exterior)	\$ <u>See attached Lot 4 Addendum for details</u>
Bee Hive Removal	\$ <u>See attached Lot 4 Addendum for details</u>

**Exterior Rodent Control; Perimeter Only**

HACA	Eastland Plaza 1144 South Airport Austin TX, 78702	\$ <u>See attached Lot 4 Addendum for details</u>
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**Termite Treatment - All Properties**

<b>Address</b>	<b>Sq. Feet</b>	<b>Rate Per Linear Foot</b>
See Below	Varies	\$ <u>See attached Lot 4 Addendum for details</u>

**Termite Inspection - Commercial Properties**

	<b>Address</b>	<b>Sq. Feet</b>	<b>Rate Per Inspection</b>
HACA	Administration Building -- Main 1124 South IH-35 Austin TX, 78704	113,373	\$ _____
HACA	1100 South IH-35 Austin TX, 78704	4,000	\$ _____
HACA	205 Chicon Street Austin TX, 78702	4,700	\$ _____
HACA	1507 South IH-35 Austin TX, 78741	9,547	\$ _____
HACA	1503 South IH-35 Austin TX, 78741	2,198	\$ _____

**Residential Properties**

	<b>Address</b>	<b>Units</b>	<b>Rate Per Inspection</b>
AMP-04	Meadowbrook Apartments & Mainspring Daycare Austin TX, 78704	160	\$ <u>See attached Lot 4 Addendum for details</u>
AMP-05/06	Booker T. Washington 905 Bedford Austin TX, 78702	216	\$ <u>See attached Lot 4 Addendum for details</u>
AMP-07	Lakeside Apartments 85 Trinity Street Austin TX, 78704	164	\$ <u>See attached Lot 4 Addendum for details</u>
AMP-08	Salina Apartments 1143 Salina Austin TX, 78702	32	\$ <u>See attached Lot 4 Addendum for details</u>
AMP-09	Gaston Place 1941 Gaston Place Austin TX, 78723	100	\$ <u>See attached Lot 4 Addendum for details</u>
AMP-10	Bouldin Oaks 1203 Cumberland Austin TX, 78704	144	\$ <u>See attached Lot 4 Addendum for details</u>
AMP-11	Thurmond Heights 8426 Goldfinch Austin TX, 78758	144	\$ <u>See attached Lot 4 Addendum for details</u>
AMP-12	Georgian Manor 110 Boles Austin TX, 78753	94	\$ <u>See attached Lot 4 Addendum for details</u>
AMP-15	Northloop Apartments 2300 West Northloop Austin TX, 78756	50	\$ <u>See attached Lot 4 Addendum for details</u>
AMP-16	Northgate Apartments 9120 North Gate Blvd Austin TX, 78758	50	\$ <u>See attached Lot 4 Addendum for details</u>
AMP-17	Shadowbend Ridge 6328 Shadowbend Austin TX, 78745	50	\$ <u>See attached Lot 4 Addendum for details</u>
AMP-18	Manchaca II 6328 Buffalo Pass Austin TX, 78745	33	\$ <u>See attached Lot 4 Addendum for details</u>

**Residential Properties**

	<b>Address</b>	<b>Units</b>	<b>Rate Per Inspection</b>
AMP-19	Manchaca Village 3628 Manchaca Austin TX, 78704	33	\$ <u>See attached Lot 4 Addendum for details</u>
AMP-22	Coronado Hills 1438 Coronado Austin TX, 78752	48	\$ <u>See attached Lot 4 Addendum for details</u>

Bidder acknowledges receipt of the following addenda:

Number 1 (Lot 4 Addendum)  
Number \_\_\_\_\_  
Number \_\_\_\_\_

Annual renewal percentage increase 3.0%  
**Respectfully Submitted of:**

Company Name:

Heat Wave Pest Control

Contact Name:

Patrick Courtney (patrick@heatwavepest.com)

HOUSING AUTHORITY  
 OF THE CITY OF AUSTIN  
 Purchasing Department  
 1124 South IH-35  
 Austin, TX 78704

PROJECT # HACA-25-P-0236 – Lot 1  
 INTEGRATED PEST  
 MANAGEMENT SERVICES

**BID PROPOSAL  
 LOT 1**

Having carefully examined the bid packet for the above referenced Project, for the Owner, the Housing Authority of the City of Austin, as well as the premises and conditions affecting this work and all other contract documents, I propose to furnish all labor, equipment, and materials necessary to complete the work as follows:

**Note:** Amounts shown shall be shown as both figure and written forms. In case of discrepancy between the written amount and the figure, the written amount will govern.

**Example:** \$123.45 per MONTH (One Hundred Twenty-Three Dollars and Forty-Five Cents per MONTH)

Commercial Properties			
	Address	Sq. Feet	Rate Per Treatment
HACA	Administration Building – Main 1124 South IH-35 Austin TX, 78704	113,373	\$ 475.00
HACA	1100 South IH-35 Austin TX, 78704	4,000	\$ 85.00
HACA	205 Chicon Street Austin TX, 78702	4,700	\$ 85.00
HACA	1507 South IH-35 Austin TX, 78741	9,547	\$ 115.00
HACA	1503 South IH-35 Austin TX, 78741	2,198	\$ 75.00

Residential Properties			
	Address	Units	Rate Per Treatment
AMP-04	Meadowbrook Apartments & Mainspring Daycare Austin TX, 78704	160	\$ 840.00
AMP-05/06	Booker T. Washington 905 Bedford Austin TX, 78702	216	\$ 1026.00
AMP-07	Lakeside Apartments 85 Trinity Street Austin TX, 78704	164	\$ 865.00

Residential Properties		
Address	Units	Rate Per Treatment
AMP-08 Salina Apartments 1143 Salina Austin TX, 78702	32	\$ 325.00
AMP-09 Gaston Place 1941 Gaston Place Austin TX, 78723	100	\$ 525.00
AMP-10 Bouldin Oaks 1203 Cumberland Austin TX, 78704	144	\$ 695.00
AMP-11 Thurmond Heights 8426 Goldfinch Austin TX, 78758	144	\$ 695.00
AMP-12 Georgian Manor 110 Boles Austin TX, 78753	94	\$ 525.00
AMP-15 Northloop Apartments 2300 West Northloop Austin TX, 78756	50	\$ 385.00
AMP-16 Northgate Apartments 9120 North Gate Blvd Austin TX, 78758	50	\$ 385.00
AMP-17 Shadowbend Ridge 6328 Shadowbend Austin TX, 78745	50	\$ 385.00
AMP-18 Manchaca II 6328 Buffalo Pass Austin TX, 78745	33	\$ 325.00
AMP-19 Manchaca Village 3628 Manchaca Austin TX, 78704	33	\$ 325.00
AMP-22 Coronado Hills 1438 Coronado Austin TX, 78752	48	\$ 375.00

Bidder acknowledges receipt of the following addenda:

Number 1  
 Number 1  
 Number \_\_\_\_\_

Annual renewal percentage increase 3 %

Respectfully Submitted of:

Company Name: Oliver Termite and Pest Control  
 Contact name: Byron Bonhomme

HOUSING AUTHORITY  
OF THE CITY OF AUSTIN  
Purchasing Department  
1124 South IH-35  
Austin, TX 78704

PROJECT # HACA-25-P-0236-- Lot 2  
BED BUG REMEDIATION  
(NON-THERMAL)

**BID PROPOSAL  
LOT 2**

Having carefully examined the bid packet for the above referenced Project, for the Owner, the Housing Authority of the City of Austin, as well as the premises and conditions affecting this work and all other contract documents, I propose to furnish all labor, equipment, and materials necessary to complete the work as follows:

**Note:** Amounts shown shall be shown as both figure and written forms. In case of discrepancy between the  
**Example:** \$123.45 per MONTH (One Hundred Twenty-Three Dollars and Forty-Five Cents per MONTH)

Bed Bug Treatment	Per Incident
0 Bedroom	\$ <u>595.00</u>
1 Bedroom	\$ <u>695.00</u>
2 Bedroom	\$ <u>795.00</u>
3 Bedroom	\$ <u>895.00</u>
4 Bedroom	\$ <u>995.00</u>
5 Bedroom	\$ <u>1095.00</u>

Bidder acknowledges receipt of the following addenda:

Number \_\_\_\_\_  
Number \_\_\_\_\_  
Number \_\_\_\_\_

Annual renewal percentage increase <sup>3</sup> \_\_\_\_\_ %

Respectfully Submitted of:

Company Name: Oliver Termite and Pest Control Inc  
Contact Name: Byron Bonhomme  
\_\_\_\_\_  
\_\_\_\_\_

HOUSING AUTHORITY  
OF THE CITY OF AUSTIN  
Purchasing Department  
1124 South IH-35  
Austin, TX 78704

PROJECT # HACA-25-P-0236-- Lot 3  
BED BUG REMEDIATION  
(THERMAL)

**BID PROPOSAL**  
**LOT 3**

Having carefully examined the bid packet for the above referenced Project, for the Owner, the Housing Authority of the City of Austin, as well as the premises and conditions affecting this work and all other contract documents, I propose to furnish all labor, equipment, and materials necessary to complete the work as follows:

**Note:** Amounts shown shall be shown as both figure and written forms. In case of discrepancy between the  
**Example:** \$123.45 per MONTH (One Hundred Twenty-Three Dollars and Forty-Five Cents per MONTH)

Bed Bug Treatment	Per Incident
0 Bedroom	\$ _____
1 Bedroom	\$ <u>N/A</u>
2 Bedroom	\$ _____
3 Bedroom	\$ _____
4 Bedroom	\$ _____
5 Bedroom	\$ _____

Bidder acknowledges receipt of the following addenda:

Number \_\_\_\_\_  
Number \_\_\_\_\_  
Number \_\_\_\_\_

Annual renewal percentage increase \_\_\_\_\_%

**Respectfully Submitted of:**

Company Name: Oliver Termite and Pest Control Inc  
Contact Name: Byron Bonhomme  
\_\_\_\_\_  
\_\_\_\_\_

HOUSING AUTHORITY  
 OF THE CITY OF AUSTIN  
 Purchasing Department  
 1124 South IH-35  
 Austin, TX 78704

PROJECT # HACA-25-P-0236-- Lot 4  
 OTHER EXTERMINATION SERVICES  
 PROVIDED "AS NEEDED"

**BID PROPOSAL  
 LOT 4**

Having carefully examined the bid packet for the above referenced Project, for the Owner, the Housing Authority of the City of Austin, as well as the premises and conditions affecting this work and all other contract documents, I propose to furnish all labor, equipment, and materials necessary to complete the work as follows:

**Note:** Amounts shown shall be shown as both figure and written forms. In case of discrepancy between the written amount and the figure, the written amount will govern.

**Example:** \$123.45 per MONTH (One Hundred Twenty-Three Dollars and Forty-Five Cents per MONTH)

**Additional Services**

	<b>Rate Per Treatment</b>
Flea treatment service call (Interior)	\$ <u>145.00</u>
Wasp/yellow jacket Treatment (Exterior)	\$ <u>85.00</u>
Bee Hive Removal	\$ <u>225.00</u>

**Exterior Rodent Control; Perimeter Only**

HACA	Eastland Plaza 1144 South Airport Austin TX, 78702	\$ <u>11.00 per box</u>
------	--	-------------------------

**Termite Treatment - All Properties**

<b>Address</b>	<b>Sq. Feet</b>	<b>Rate Per Linear Foot</b>
See Below	Varies	\$ <u>8.00 per Linear ft.</u>

**Termite Inspection - Commercial Properties**

	<b>Address</b>	<b>Sq. Feet</b>	<b>Rate Per Inspection</b>
HACA	Administration Building -- Main 1124 South IH-35 Austin TX, 78704	113,373	\$ <u>225.00</u>
HACA	1100 South IH-35 Austin TX, 78704	4,000	\$ <u>135.00</u>
HACA	205 Chicon Street Austin TX, 78702	4,700	\$ <u>135.00</u>
HACA	1507 South IH-35 Austin TX, 78741	9,547	\$ <u>135.00</u>
HACA	1503 South IH-35 Austin TX, 78741	2,198	\$ <u>135.00</u>

**Residential Properties**

	<b>Address</b>	<b>Units</b>	<b>Rate Per Inspection</b>
AMP-04	Meadowbrook Apartments & Mainspring Daycare Austin TX, 78704	160	115.00 per Bldg \$ _____
AMP-05/06	Booker T. Washington 905 Bedford Austin TX, 78702	216	115.00 per Bldg \$ _____
AMP-07	Lakeside Apartments 85 Trinity Street Austin TX, 78704	164	115.00 per Bldg \$ _____
AMP-08	Salina Apartments 1143 Salina Austin TX, 78702	32	115.00 per Bldg \$ _____
AMP-09	Gaston Place 1941 Gaston Place Austin TX, 78723	100	115.00 per Bldg \$ _____
AMP-10	Bouldin Oaks 1203 Cumberland Austin TX, 78704	144	115.00 per Bldg \$ _____
AMP-11	Thurmond Heights 8426 Goldfinch Austin TX, 78758	144	115.00 per Bldg \$ _____
AMP-12	Georgian Manor 110 Boles Austin TX, 78753	94	115.00 per Bldg \$ _____
AMP-15	Northloop Apartments 2300 West Northloop Austin TX, 78756	50	115.00 per Bldg \$ _____
AMP-16	Northgate Apartments 9120 North Gate Blvd Austin TX, 78758	50	115.00 per Bldg \$ _____
AMP-17	Shadowbend Ridge 6328 Shadowbend Austin TX, 78745	50	115.00 per Bldg \$ _____
AMP-18	Manchaca II 6328 Buffalo Pass Austin TX, 78745	33	115.00 per Bldg \$ _____

**Residential Properties**

	<b>Address</b>	<b>Units</b>	<b>Rate Per Inspection</b>
AMP-19	Manchaca Village 3628 Manchaca Austin TX, 78704	33	\$ 115.00 per Bldg
AMP-22	Coronado Hills 1438 Coronado Austin TX, 78752	48	\$ 115.00 per Bldg

Bidder acknowledges receipt of the following addenda:

Number \_\_\_\_\_  
Number \_\_\_\_\_  
Number \_\_\_\_\_

Annual renewal percentage increase 3 %

**Respectfully Submitted of:**

Company Name:

Oliver Termite and Pest Control Inc

Contact Name:

Byron BonhommeX

# Statement of Bidder's Qualifications

## 1. Name of Bidder:

Activus Pest, LLC  
Doing business as Heat Wave Pest Control

## 2. Permanent main office address:

9311 N FM 620 STE 300  
Austin, Texas 78726

## 3. When organized:

2014 (original)  
2023 (reorganization as new LLC)

## 4. State whether bidder is a Corporation, Partnership, or Sole Proprietor:

Corporation (LLC; S Corp)

## 5. If "Corporation, date and State of Incorporation.:

May 2014; Texas (original registration)  
February 2023; Delaware; registered in Texas (updated registration)

## 6. A breakdown of the minority ownership of the business (Gender, White, Black Hispanic, American Hispanic, American Indian/Eskimo, Asian/Pacific islander, etc.). Who owns what percent of the business, and any other related information.

There are only two (2) current equity partners for Heat Wave Pest Control

1. Patrick Courtney – male; white; 50% equity position
2. Gustavo Adrian Rojo – male; Hispanic (1<sup>st</sup> generation Mexican-American), 50% equity position

## 7. Number of years engaged in contracting business under present name:

11

## 8. Contract in progress (gross amounts of contracts, estimated completion dated, project owner, architect).

The project owner for all current projects is Patrick Courtney. All projects listed below are ongoing:

Gaston Place - \$1,475 per month – regular pest control / IPM – began servicing this community in July 2019  
North Loop - \$1,400 per month – regular pest control / IPM – began servicing this community in July 2019  
Lakeside - \$1,690 per month – regular pest control / IPM – began servicing this community in July 2019  
Salinas – \$486.40 per month – regular pest control / IPM – began servicing this community in September 2024

In addition to the above, Heat Wave Pest Control also has performed various bedbug, rodent, roach, and other remediation projects in the past twelve months for other HACA residential communities including Coronado Hills Apartments and Thurmond Heights Apartments

## 9. General character of work performed by your company:

Pest Control Services, including general pest control inspections and treatments, rodent remediation, and bed bug remediation (both chemical and thermal)

## 10. Report on any failures to complete work awarded to you (where, when & why).

### Report any contracts you have defaulted on.

Not applicable (and never applicable during our tenure serving HACA and its residents)

## **Statement of Bidder's Qualifications**

**11. Name & address of bonding company and name and address of agent:**

Rachel Simbeck  
Assured Partners  
3900 Kinross Lakes Parkway, Suite 300  
Richfield, Ohio 44286  
550.895.6530

**12. List of three (3) currently completed projects, including name, address, phone number, and type of work**

See above.

**13. List any previous contracts, including dated executed with HACA.**

See above – current contracts include monthly services for 4 communities, the 3 oldest of which began services in July 2019.

SUPPLEMENTAL MATERIALS INCLUDED IN THE FOLLOWING PAGES

1. Certificate of Insurance
2. Business License
3. Lot 1 Addendum
4. Lot 2 Addendum
5. Lot 3 Addendum
6. Lot 4 Addendum

# OLIVER PEST CONTROL

P.O.BOX 4083 AUSTIN, TEXAS 78765  
512-926-1509

## Statement of Bidder's Qualifications

1. Oliver Termite and Pest Control Inc
2. Business physical address: 111 west Anderson Lane E-306
3. Business Date started in 1947, and incorporated September 1983 State of Texas
4. Texas a "C" Corporation
5. Oliver Termite and Pest Control Inc. 30.3424166, -97,7071155994
6. 100% black non-Hispanic male minority ownership
7. 41 years under present ownership
8. City of Austin Housing Authority

1124 S. IH35

Austin, Texas

Nora Velasco 512-804-8480

Amount of Contracts: (11,580.00) estimate annually to present and active

Pedernales Electric Cooperative all Locations in Central Texas

P.O. Box 1

Johnson City Texas 78636

Teri Arnold

830-330-1209

Amount of Contracts: (52,800.00) estimate annually to present and active

Round Rock Housing Authority

1505 Lance Lane

Round Rock, Texas 78664

Ebby Green

(512) 255-9159 office

(512) 940-5069

[ebby@roundrockha.org](mailto:ebby@roundrockha.org)

Amount of Contracts: (5000.00) estimate annually to present and active

9. Oliver Termite and Pest Control is a company the promote IPM services, I have attached a form to help explain our views when it comes to educating our clients. Our beliefs are education comes first in any pest control services. When you

educate your client then work together, it then helps keep the bldg free of insects while at the same time using the least amount of chemicals.

10 N/a

11. N/a

12. City of Austin Housing Authority

1124 S. IH35

Austin, Texas

Nora Velasco 512-804-8480

Amount of Contracts: (11,580.00) estimate annually to present and active

Pedernales Electric Cooperative all Locations in Central Texas

P.O. Box 1

Johnson City Texas 78636

Teri Arnold

830-330-1209

Amount of Contracts: (52,800.00) estimate annually to present and active

Round Rock Housing Authority

1505 Lance Lane

Round Rock, Texas 78664

Ebby Green

(512) 255-9159 office

(512) 940-5069

[ebby@roundrockha.org](mailto:ebby@roundrockha.org)

Amount of Contracts: (5000.00) estimate annually to present and active

Texas Facilities Commission Mgmt all state Bldgs.

1711 San Jacinto

Austin, Texas 78701

Attn: Matthew Wordell

512-769-1388

Amount of Contract 20,460.00 estimate annually to present and active

13. City of Austin Housing Authority (all residential units)

1124 S IH35

Austin, Texas

512-804-8480

City of Round Rock

221 E Main St

Round Rock Tx 78664

Attn Pam Keltgen

512-314-3353 office

SINCERELY

Oliver Termite and Pest Control

Byron BonHomme

# OLIVER PEST CONTROL

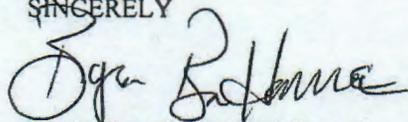
P.O.BOX 4083 AUSTIN, TEXAS 78765  
512-926-1509

## Executive Summary

A statement of the work is identified; we intend on assigning each location a scheduled day for service and that day will be the same day each month. We will post a schedule of treatment on the information board at each location; any follow-up services or additional services required will be scheduled according to the agreement. We will also provide an electronic folder for pesticides and the msds of all chemicals that will be used on each location.

The program we will implement is the IPM program this approach is described in the approach plan of this RFP. If there is a particular pest problem, it will be identified, and a solution will be performed. Each location will receive an invoice report of any deficiencies that were noted at the time of service. This report will be emailed to the building manager of each location.

SINCERELY



Oliver Termite and Pest Control  
Byron BonHomme

# **OLIVER TERMITE & PEST CONTROL, INC.**

## **STRATEGIC PEST CONTROL MANAGEMENT PLAN FOR HOUSING AUTHORITY OF THE CITY OF AUSTIN**

Our "Team One", consisting of 3-Certified Pest Control Technicians with 1-Field Supervisor will be tasked to implement Oliver Termite & Pest Control's (IPM) Integrated Pest Management Program. The "IPM" Management Program is a process for achieving long term environmentally sound pest suppression by using a wide variety of technical and management practices. "IPM" controls pests while reducing the hazards of pests and pesticide exposure to humans.

We will be implementing 4-Points of "IPM" for the routine monthly pest control visits to the Locations:

- Prevent pest populations inside and outside around perimeter of all buildings.
- For Rodents when needed, we will implement the use of bait boxes which will be routinely checked and serviced on a monthly basis.
- Pesticides will be applied only as needed.
- We shall select and apply the least hazardous pesticides.
- Our pest control technicians will place target pesticides to areas not accessible to occupants.

The pesticides that will be used will only be low-impact insecticides as follows:

- Boric Acid is used to control cockroaches, ants, spiders, and silverfish.
- Vendetta Roach Bait is a low impact gel and is used only as needed.
- An ECO Exempt IC Insecticide product will be used that is made with Rosemary Oil for general use when needed or any other additional low-impact insecticides, and also other insect growth regulators (IGR's) .

**Specific target areas will be identified to prevent pest population. Our technicians will be targeting areas such as plumbing areas, doors, air vents and common spaces. The use of sticky pest traps and pesticides will be applied as needed. Also, crack and crevice treatment will be done with pesticides being applied in all voids. Larger cracks will need the use of baits, gels, and powders. The outside perimeter of the buildings will be monitored using rodent bait boxes, this will drastically reduce exposure to any rodents trying to enter the buildings.**

**The benefits of a strategic “IPM” Management Plan are listed as follows:**

- Reduced Pesticide use**
- A Healthier Environment**
- Better long-term control of all pests**
- Reduced Liability of building management**

EVALUATION	points	points	points
1. Demonstrated Capability to provide the services requested in the proposal(30)	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
2. Documented past experience and performance (15 )	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
3. Cost effectivenesss (20 )	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
4. Staff qualifications and experience (15 )	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
5. Minority/Woman Owned Business Enterprise (MWBE) (15)	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
5. Participation in or certification by any or all the following: Greenpro, Greenshield, Ecowise (15)	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
TOTAL	0	0	0

Evaluator: CJames

Date: 01/08/2026

EVALUATION	points	points	points
1. Demonstrated Capability to provide the services requested in the proposal(30)	30 Comments Heatwave is a long-standing vendor currently servicing PAMI's elderly/disabled properties. The company has demonstrated capacity in meeting the needs of the agency as acknowledge by current performance.	30 Comments Oliver Pest Control is a long-standing vendor currently servicing PAMI properties. The company has demonstrated capacity in meeting the needs of the agency as acknowledge prior contract services and performance.	0 Comments While, Sunshine Eco Services has provided services to some PAMI properties before, their overall performance remains unknown.
2. Documented past experience and performance (15 )	15 Comments Yes - Heatwave is a current vendor.	15 Comments Yes - Oliver is a current vendor.	0 Comments No record of performance.
3. Cost effectiveness (20 )	15 Comments Yes - Heatwave is cost effective given additional services included in monthly services, vendor responsiveness, and quality of work.	20 Comments Yes - Oliver is cost effective given services warranties, customer services/monthly services, vendor responsiveness, and quality of work.	0 Comments No - Sunshine bids exceed property budgets. Not in range for normal servicing.
4. Staff qualifications and experience (15 )	15 Comments Heatwave - Meets expectations	15 Comments Oliver - Meets expectations	0 Comments Sunshine - Unknown
5. Minority/Woman Owned Business Enterprise (MWBE) (15)	15 Comments Yes - HUD Form 5369-C notes the vendor elect minority-owned business.	15 Comments Yes - HUD Form 5369-C notes the vendor elect minority-owned business.	15 Comments Yes - However the vendor has been disqualified; non-responsive for questions regarding bid. Overpriced.
5. Participation in or certification by any or all the following: Greenpro, Greenshield, Ecowise (15)	15 Comments	10 Comments	10 Comments Disqualified; non-responsive for questions regarding bid. Overpriced.

TOTAL

105

105

25

EVALUATION	points	points	points
1. Demonstrated Capability to provide the services requested in the proposal(30)	30 Comments Heatwave is an established vendor providing services to PAMI's elderly and disabled properties. The company has consistently demonstrated its ability to meet the agency's operational needs, as reflected in its current performance.	30 Comments Oliver Pest Control is an established vendor providing services to PAMI properties and has consistently demonstrated its ability to meet the agency's needs through prior contract performance.	0 Comments Although Sunshine Eco Services has provided services to select PAMI properties in the past, its overall performance has not been fully evaluated.
2. Documented past experience and performance (15 )	15 Comments Yes - Heatwave is a current vendor.	15 Comments Yes - Oliver is a current vendor.	0 Comments No record of performance.
3. Cost effectiveness (20 )	15 Comments Heatwave has been determined to be cost-effective based on the additional services included in the monthly service agreement, the vendor's responsiveness, and the quality of work provided.	20 Comments Oliver is cost-effective considering service warranties, customer services, responsiveness, and quality of work.	0 Comments Sunshine's bids exceed property budget limitations and fall outside the acceptable range for routine servicing.
4. Staff qualifications and experience (15 )	15 Comments Heatwave - Meets qualifications; also current vendor with known experiences.	15 Comments Oliver - Meets qualifications; current vendor with known experience.	0 Comments Sunshine - Unknown
5. Minority/Woman Owned Business Enterprise (MWBE) (15)	15 Comments Yes - HUD Form 5369-C notes the vendor elect minority-owned business.	15 Comments Yes - HUD Form 5369-C notes the vendor elect minority-owned business.	15 Comments Yes; however, the vendor was disqualified due to non-responsiveness and excessive pricing.
5. Participation in or certification by any or all the following: Greenpro, Greenshield, Ecowise (15)	10 Comments	10 Comments	10 Comments Disqualified for non-responsiveness and excessive pricing.
TOTAL	100	105	25

Evaluator: FGarcia

Date: 01/09/2026

EVALUATION	points	points	points
1. Demonstrated Capability to provide the services requested in the proposal(30)	26 Comments Heatwave: Yes. Current vendor - The company has a great scheduling system that allows for easy services and appointment. Prep forms easily available.	20 Comments Oliver: Yes. Current vendor - Great with rodent services, but can use a better scheduling system.	0 Comments Although Sunshine Eco Services has provided services to select PAMI properties in the past, the vendor was disqualified for non-responsiveness and unreasonable bid.
2. Documented past experience and performance (15 )	10 Comments Heatwave: The follow-up notes are not the best; experienced as current vendor. Learning experience, but thinking the vendor can improve in this area.	14 Comments Oliver: Great and experienced with the documentation needed for ongoing services. Very detailed in follow-up actions and service needs.	0 Comments N/A
3. Cost effectivenesss (20 )	17 Comments Heatwave is more expensive, however Roach Treatments and Bedbud services are included in monthly service cost. This will help create some balance given needs at elderly sites.	20 Comments Oliver: Very cost effective. Within budget for all properties.	0 Comments N/A
4. Staff qualifications and experience (15 )	12 Comments Heatwave - This company has a history working with our elderly/disabled sites. Regular staff services the property; engage with manager and PAMI staff. We are comfortable with their services.	12 Comments Oliver's team has been pretty consistant in staffing. Same experienced staff provides services; qualified for service and customer service to our residents.	0 Comments N/A
5. Minority/Woman Owned Business Enterprise (MWBE) (15)	15 Comments Yes - Heat Wave 50% as noted under qualifications	15 Comments Yes - Oliver Pest Control 100% as noted under qualifications	0 Comments N/A
5. Participation in or certification by any or all the following: Greenpro, Greenshield, Ecowise (15)	15 Comments Yes	15 Comments Yes	0 Comments N/A
TOTAL	95	96	0

Evaluator: Tamika Gilmore

Date: 01/09/2026

EVALUATION	points	points	points
1. Demonstrated Capability to provide the services requested in the proposal(30)	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
2. Documented past experience and performance (15 )	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
3. Cost effectivenesss (20 )	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
4. Staff qualifications and experience (15 )	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
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TOTAL      0      0      0

Evaluator: CJames      Date: 01/08/2026

EVALUATION	points	points	points
1. Demonstrated Capability to provide the services requested in the proposal(30)	30 Comments Heatwave is a long-standing vendor currently servicing PAMI's elderly/disabled properties. The company has demonstrated capacity in meeting the needs of the agency as acknowledge by current performance.	30 Comments Oliver Pest Control is a long-standing vendor currently servicing PAMI properties. The company has demonstrated capacity in meeting the needs of the agency as acknowledge prior contract services and performance.	0 Comments While, Sunshine Eco Services has provided services to some PAMI properties before, their overall performance remains unknown.
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5. Participation in or certification by any or all the following: Greenpro, Greenshield, Ecowise (15)	15 Comments	10 Comments	10 Comments Disqualified; non-responsive for questions regarding bid. Overpriced.
TOTAL	105	105	25

Evaluator: CJames

Date: 01/08/2026

EVALUATION	points	points	points
1. Demonstrated Capability to provide the services requested in the proposal(30)	30 Comments Heatwave is an established vendor providing services to PAMI's elderly and disabled properties. The company has consistently demonstrated its ability to meet the agency's operational needs, as reflected in its current performance.	30 Comments Oliver Pest Control is an established vendor providing services to PAMI properties and has consistently demonstrated its ability to meet the agency's needs through prior contract performance.	0 Comments Although Sunshine Eco Services has provided services to select PAMI properties in the past, its overall performance has not been fully evaluated.
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5. Participation in or certification by any or all the following: Greenpro, Greenshield, Ecowise (15)	10 Comments	10 Comments	10 Comments Disqualified for non-responsiveness and excessive pricing.
TOTAL	100	105	25

Evaluator: FGarcia

Date: 01/09/2026

EVALUATION	points	points	points
1. Demonstrated Capability to provide the services requested in the proposal(30)	26 Comments Heatwave: Yes. Current vendor - The company has a great scheduling system that allows for easy services and appointment. Prep forms easily available.	20 Comments Oliver: Yes. Current vendor - Great with rodent services, but can use a better scheduling system.	0 Comments Although Sunshine Eco Services has provided services to select PAMI properties in the past, the vendor was disqualified for non-responsiveness and unreasonable bid.
2. Documented past experience and performance (15 )	10 Comments Heatwave: The follow-up notes are not the best; experienced as current vendor. Learning experience, but thinking the vendor can improve in this area.	14 Comments Oliver: Great and experienced with the documentation needed for ongoing services. Very detailed in follow-up actions and service needs.	0 Comments N/A
3. Cost effectivenesss (20 )	17 Comments Heatwave is more expensive, however Roach Treatments and Bedbud services are included in monthly service cost. This will help create some balance given needs at elderly sites.	20 Comments Oliver: Very cost effective. Within budget for all properties.	0 Comments N/A
4. Staff qualifications and experience (15 )	12 Comments Heatwave - This company has a history working with our elderly/disabled sites. Regular staff services the property; engage with manager and PAMI staff. We are comfortable with their services.	12 Comments Oliver's team has been pretty consistant in staffing. Same experienced staff provides services; qualified for service and customer service to our residents.	0 Comments N/A
5. Minority/Woman Owned Business Enterprise (MWBE) (15)	15 Comments Yes - Heat Wave 50% as noted under qualifications	15 Comments Yes - Oliver Pest Control 100% as noted under qualifications	0 Comments N/A
5. Participation in or certification by any or all the following: Greenpro, Greenshield, Ecowise (15)	15 Comments Yes	15 Comments Yes	0 Comments N/A
TOTAL	95	96	0

Evaluator: Tamika Gilmore

Date: 01/09/2026

EVALUATION	points	points	points
1. Demonstrated Capability to provide the services requested in the proposal(30)	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
2. Documented past experience and performance (15 )	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
3. Cost effectivenesss (20 )	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
4. Staff qualifications and experience (15 )	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
5. Minority/Woman Owned Business Enterprise (MWBE) (15)	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments
5. Participation in or certification by any or all the following: Greenpro, Greenshield, Ecowise (15)	<input type="text"/> Comments	<input type="text"/> Comments	<input type="text"/> Comments

TOTAL      0      0      0

Evaluator: CJames      Date: 01/08/2026

EVALUATION	points	points	points
1. Demonstrated Capability to provide the services requested in the proposal(30)	30 Comments Heatwave is a long-standing vendor currently servicing PAMI's elderly/disabled properties. The company has demonstrated capacity in meeting the needs of the agency as acknowledge by current performance.	30 Comments Oliver Pest Control is a long-standing vendor currently servicing PAMI properties. The company has demonstrated capacity in meeting the needs of the agency as acknowledge prior contract services and performance.	0 Comments While, Sunshine Eco Services has provided services to some PAMI properties before, their overall performance remains unknown.
2. Documented past experience and performance (15 )	15 Comments Yes - Heatwave is a current vendor.	15 Comments Yes - Oliver is a current vendor.	0 Comments No record of performance.
3. Cost effectiveness (20 )	15 Comments Yes - Heatwave is cost effective given additional services included in monthly services, vendor responsiveness, and quality of work.	20 Comments Yes - Oliver is cost effective given services warranties, customer services/monthly services, vendor responsiveness, and quality of work.	0 Comments No - Sunshine bids exceed property budgets. Not in range for normal servicing.
4. Staff qualifications and experience (15 )	15 Comments Heatwave - Meets expectations	15 Comments Oliver - Meets expectations	0 Comments Sunshine - Unknown
5. Minority/Woman Owned Business Enterprise (MWBE) (15)	15 Comments Yes - HUD Form 5369-C notes the vendor elect minority-owned business.	15 Comments Yes - HUD Form 5369-C notes the vendor elect minority-owned business.	15 Comments Yes - However the vendor has been disqualified; non-responsive for questions regarding bid. Overpriced.
5. Participation in or certification by any or all the following: Greenpro, Greenshield, Ecowise (15)	15 Comments	10 Comments	10 Comments Disqualified; non-responsive for questions regarding bid. Overpriced.

TOTAL

105

105

25

EVALUATION	points	points	points
1. Demonstrated Capability to provide the services requested in the proposal(30)	30 Comments Heatwave is an established vendor providing services to PAMI's elderly and disabled properties. The company has consistently demonstrated its ability to meet the agency's operational needs, as reflected in its current performance.	30 Comments Oliver Pest Control is an established vendor providing services to PAMI properties and has consistently demonstrated its ability to meet the agency's needs through prior contract performance.	0 Comments Although Sunshine Eco Services has provided services to select PAMI properties in the past, its overall performance has not been fully evaluated.
2. Documented past experience and performance (15 )	15 Comments Yes - Heatwave is a current vendor.	15 Comments Yes - Oliver is a current vendor.	0 Comments No record of performance.
3. Cost effectiveness (20 )	15 Comments Heatwave has been determined to be cost-effective based on the additional services included in the monthly service agreement, the vendor's responsiveness, and the quality of work provided.	20 Comments Oliver is cost-effective considering service warranties, customer services, responsiveness, and quality of work.	0 Comments Sunshine's bids exceed property budget limitations and fall outside the acceptable range for routine servicing.
4. Staff qualifications and experience (15 )	15 Comments Heatwave - Meets qualifications; also current vendor with known experiences.	15 Comments Oliver - Meets qualifications; current vendor with known experience.	0 Comments Sunshine - Unknown
5. Minority/Woman Owned Business Enterprise (MWBE) (15)	15 Comments Yes - HUD Form 5369-C notes the vendor elect minority-owned business.	15 Comments Yes - HUD Form 5369-C notes the vendor elect minority-owned business.	15 Comments Yes; however, the vendor was disqualified due to non-responsiveness and excessive pricing.
5. Participation in or certification by any or all the following: Greenpro, Greenshield, Ecowise (15)	10 Comments	10 Comments	10 Comments Disqualified for non-responsiveness and excessive pricing.
TOTAL	100	105	25

Evaluator: FGarcia

Date: 01/09/2026

EVALUATION	points	points	points
1. Demonstrated Capability to provide the services requested in the proposal(30)	26 Comments Heatwave: Yes. Current vendor - The company has a great scheduling system that allows for easy services and appointment. Prep forms easily available.	20 Comments Oliver: Yes. Current vendor - Great with rodent services, but can use a better scheduling system.	0 Comments Although Sunshine Eco Services has provided services to select PAMI properties in the past, the vendor was disqualified for non-responsiveness and unreasonable bid.
2. Documented past experience and performance (15 )	10 Comments Heatwave: The follow-up notes are not the best; experienced as current vendor. Learning experience, but thinking the vendor can improve in this area.	14 Comments Oliver: Great and experienced with the documentation needed for ongoing services. Very detailed in follow-up actions and service needs.	0 Comments N/A
3. Cost effectivenesss (20 )	17 Comments Heatwave is more expensive, however Roach Treatments and Bedbud services are included in monthly service cost. This will help create some balance given needs at elderly sites.	20 Comments Oliver: Very cost effective. Within budget for all properties.	0 Comments N/A
4. Staff qualifications and experience (15 )	12 Comments Heatwave - This company has a history working with our elderly/disabled sites. Regular staff services the property; engage with manager and PAMI staff. We are comfortable with their services.	12 Comments Oliver's team has been pretty consistant in staffing. Same experienced staff provides services; qualified for service and customer service to our residents.	0 Comments N/A
5. Minority/Woman Owned Business Enterprise (MWBE) (15)	15 Comments Yes - Heat Wave 50% as noted under qualifications	15 Comments Yes - Oliver Pest Control 100% as noted under qualifications	0 Comments N/A
5. Participation in or certification by any or all the following: Greenpro, Greenshield, Ecowise (15)	15 Comments Yes	15 Comments Yes	0 Comments N/A
TOTAL	95	96	0

Evaluator: Tamika Gilmore

Date: 01/09/2026



# HOUSING AUTHORITY OF THE CITY OF AUSTIN

## BOARD ACTION REQUEST

### Finance ITEM 4.

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**MEETING DATE:** February 19, 2026  
**STAFF CONTACT:** Barbara Chen, Vice President & Chief Financial Officer  
**ITEM TITLE:** Presentation, Discussion and Possible Action regarding Resolution No. 02935: Operating Budgets for the Fiscal Year April 1, 2026 to March 31, 2027  
**BUDGETED ITEM:** N/A  
**TOTAL COST:** N/A

### ACTION

Motion to Approve Resolution No. 02935; Approving Central Office, Assisted Housing, Southwest Housing Compliance Corporation, Austin Affordable Housing Corporation, Austin Pathways and Blueprint Housing Solutions Operating Budgets for the Fiscal Year April 1, 2026, to March 31, 2027.

### SUMMARY

**Background:**

The regulations of the U.S. Department of Housing and Urban Development require the Commissioners of the Housing Authority of the City of Austin to approve the agency's Operating Budget.

**Process:**

The Finance team met with each department head to review their proposed budgets for the coming fiscal year. Subsequent discussions were held with the President/CEO and Chief Operating Officer to finalize the proposed budgets. Strategic plan objectives, rebranding, and other anticipated milestones were considered as part of the budget process. Please see the attached documents for more detail.

**Staff Recommendation:**

Staff recommends the Approval of the Central Office, Assisted Housing, Southwest Housing Compliance Corporation, Austin Affordable Housing Corporation, Austin Pathways and Blueprint Housing Solutions Operating Budgets for the Fiscal Year April 1, 2026, to March 31, 2027.

**ATTACHMENTS:**

FY 27 Operating Budget - All

**RESOLUTION NO. 02935**

**RESOLUTION APPROVING THE OPERATING BUDGETS FOR THE FISCAL YEAR APRIL 1, 2026, TO MARCH 31, 2027**

**WHEREAS**, the regulations of the U. S. Department of Housing and Urban Development (HUD) require the Commissioners of the Housing Authority of the City of Austin to approve the Agency’s Operating Budget; and

**WHEREAS**, the Commissioners of the Housing Authority of the City of Austin have reviewed the Operating Budgets and do find:

- 1) That the proposed expenditures are necessary for the efficient and economical operation of the programs for the purpose of serving low-income families.
- 2) That the financial plan is reasonable in that:
  - (a) It includes sources of funding adequate to cover all proposed expenditures, and
  - (b) It does not provide for the use of federal funding in excess of that payable under the provisions of the Annual Contributions Contract.
- 3) That the operating budget as presented for adoption reflects Total Revenue of \$881,287,306, Total Expenditures of \$871,200,927, and Fund Balance utilized of \$10,086,379.

**WHEREAS**, the Board of Commissioners of the Housing Authority of the City of Austin hereby certifies that the Housing Authority of the City of Austin is in compliance with the Annual Contributions Contract; and

**NOW, THEREFORE, BE IT RESOLVED** that the Board of Commissioners of the Housing Authority of the City of Austin hereby approves the Fiscal Year 2027 Operating Budgets, copies of which are attached.

**PASSED, APPROVED AND ADOPTED** this 19th day of February 2026.

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Michael G. Gerber, Secretary

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Carl S. Richie, Jr., Chairperson

**HOUSING AUTHORITY OF THE CITY OF AUSTIN**  
**ALL NON-PBRA PROGRAMS AND DEPARTMENTS COMBINED**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Tenant Revenue</b>				
Rental Charges	5,311,858	10,623,717	11,200,440	10,863,389
Write-Off / Bad Debt	(116,683)	(233,366)	(110,604)	(193,440)
Non-Dwelling Rental	688,995	1,377,991	1,384,716	1,236,120
<b>Total Tenant Revenue</b>	<b>5,884,171</b>	<b>11,768,342</b>	<b>12,474,552</b>	<b>11,906,069</b>
<b>Fraud Recovery</b>				
Fraud Recovery- Housing Assistance Payments	4,263	8,526	9,996	10,000
<b>Total Fraud Recovery</b>	<b>4,263</b>	<b>8,526</b>	<b>9,996</b>	<b>10,000</b>
<b>Operating Grants</b>				
HAP Subsidy	321,464,022	642,928,045	619,174,332	711,016,475
HAP Admin Fees	14,611,503	29,223,005	28,084,860	29,196,198
Port In HAP/URP	384,379	768,758	0	2,670,576
Port In Admin Fees	11,827	23,655	0	105,616
HAP Admin Fees - EHV Service Fees	36,421	72,843	69,996	0
HUD FSS Grant Revenue	272,771	545,541	1,176,804	1,406,431
HCV HAP	56,755,360	113,510,720	105,172,392	100,925,813
Grants Revenue	268,357	536,715	1,223,844	6,927,544
FSS Recapture	7,226	14,452	6,000	12,000
<b>Total Operating Grants</b>	<b>393,811,867</b>	<b>787,623,734</b>	<b>754,908,228</b>	<b>852,260,653</b>
<b>Investment Income</b>				
Investment Income - Unrestricted - Admin	2,016,183	4,032,365	2,631,060	2,800,000
<b>Total Investment Income</b>	<b>2,016,183</b>	<b>4,032,365</b>	<b>2,631,060</b>	<b>2,800,000</b>
<b>Interest Income</b>				
Interest on Bank Accounts	157,049	314,098	271,596	243,000
<b>Total Interest Income</b>	<b>157,049</b>	<b>314,098</b>	<b>271,596</b>	<b>243,000</b>
<b>Other Revenue</b>				
Developer Fees	1,194,136	2,388,272	3,000,000	3,000,000
Management Fee	1,179,769	2,359,537	1,186,020	1,869,181
Bookkeeping Fee	275,843	551,685	332,076	450,000
Asset Management Fees	2,888,492	5,776,984	0	0
Distribution Revenue	982,845	1,965,689	3,999,996	3,000,000
Land Lease Income	950	1,900	0	0
Acquisition fees	1,798,988	3,597,975	3,500,004	3,500,000
Bulk Trash Revenue	24,731	49,463	39,996	50,000
Miscellaneous Income	120,875	241,751	65,004	92,000
Prior Period Adjustment	12,951	25,903	0	0
Other Income - Misc	2,330,674	4,661,348	1,785,732	2,006,403
Blueprint - Voucher Processing	13,919	27,838	72,216	90,000
Blueprint - Consulting	40,403	80,807	25,308	10,000
<b>Total Other Revenue</b>	<b>10,864,576</b>	<b>21,729,152</b>	<b>14,006,352</b>	<b>14,067,584</b>
<b>Total Revenue</b>	<b>412,738,109</b>	<b>825,476,217</b>	<b>784,301,784</b>	<b>881,287,306</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Salaries</b>				
Admin Salaries - Regular	6,944,811	13,889,621	14,425,164	15,228,181
Admin Salaries - Temp	0	0	3,000	0
Admin Salaries - Overtime	10,208	20,417	17,496	4,500
Incentive Pay	192,469	384,939	1,009,704	1,250,000

**HOUSING AUTHORITY OF THE CITY OF AUSTIN**  
**ALL NON-PBRA PROGRAMS AND DEPARTMENTS COMBINED**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Property Mgmt. - Payroll	462,357	924,713	900,072	882,440
Compensated Absences	0	0	826,524	792,787
<b>Total Salaries</b>	<b>7,609,845</b>	<b>15,219,690</b>	<b>17,181,960</b>	<b>18,157,908</b>
<b>Legal Expense</b>				
Legal Expense	265,555	531,109	611,508	587,000
<b>Total Legal Expenses</b>	<b>265,555</b>	<b>531,109</b>	<b>611,508</b>	<b>587,000</b>
<b>Travel &amp; Training</b>				
Staff Training	41,755	83,510	154,440	147,155
Staff Training - Strategic Planning	0	0	60,000	10,000
Travel - Airlines	15,480	30,959	61,248	60,184
Travel - Lodging	26,976	53,951	81,564	92,754
Travel - Car Transportation	5,362	10,723	11,724	9,719
Travel - Mileage	624	1,248	3,840	5,617
MOR Travel	76,017	152,033	153,960	188,306
Per Diem	5,277	10,555	20,268	20,329
Misc Travel	491	982	1,644	2,338
Travel - Conference Fees	13,382	26,764	61,056	66,655
<b>Total Travel &amp; Training</b>	<b>185,363</b>	<b>370,725</b>	<b>609,744</b>	<b>603,057</b>
<b>Auditing Fees</b>				
Auditing Fees	158,250	316,500	201,996	228,000
<b>Total Audit Fees</b>	<b>158,250</b>	<b>316,500</b>	<b>201,996</b>	<b>228,000</b>
<b>Office Expenses</b>				
Office Supplies	15,030	30,060	45,096	35,653
Postage, Couriers, Express Mail	35,461	70,922	55,488	57,950
Printing	155,108	310,216	27,792	28,250
Advertising and Marketing	155,108	310,216	56,004	65,750
Membership Dues and Fees	26,581	53,162	130,164	93,549
Telephone	46,508	93,015	139,440	139,807
Internet / Cable	13,445	26,890	15,624	27,489
Office Custodial	63	126	8,508	2,500
Maint. Agreement - Office Equipment	97,433	194,867	737,124	901,086
Computer Equipment	38,253	76,507	58,008	93,500
Equipment Leases	18,054	36,108	44,460	39,558
Office Equipment/Furniture	13,469	26,937	4,152	6,200
Admin Contractors	151,215	302,431	219,384	417,586
Meeting	16,091	32,181	116,316	70,000
Misc. Expenses	123,094	246,188	150,192	53,200
Subscriptions	19,115	38,229	41,064	49,451
Bank Charges	33,264	66,528	18,000	68,000
Internship	16,831	33,663	60,000	135,416
Consultants	332,769	665,538	679,596	1,096,237
Credit Check	90,698	181,395	120,504	158,800
Criminal Check	12,738	25,476	20,100	18,600
Employee Physical /Drug Test	1,815	3,630	6,504	5,000
Interpreter Fee	1,201	2,401	12,456	5,850
Software	614,424	1,228,847	684,756	715,926
Storage Lease	5,772	11,544	9,996	12,000
Document Shredding	3,880	7,760	4,260	4,608
Appraisals / Desk Reviews	26,795	53,590	53,400	58,949
Breakroom Supplies	12,538	25,077	9,996	31,361
Sponsorships/Industry Contributions	46,050	92,100	165,000	136,500

**HOUSING AUTHORITY OF THE CITY OF AUSTIN**  
**ALL NON-PBRA PROGRAMS AND DEPARTMENTS COMBINED**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Wellness Program	0	0	5,004	6,000
Permits, Licenses & Certificates	3,981	7,962	2,712	4,562
Inspections	39,538	79,075	89,868	80,100
HACA Family Scholarship	62,500	125,000	75,000	75,000
Tuition Reimbursement	0	0	9,996	10,000
Employee Referral Program	1,000	2,000	5,004	3,000
Recruiting	0	0	7,500	7,500
Office Space Rental	108,150	216,301	216,300	216,300
Collection Agency Fees	0	0	96	100
Port-Out Admin Fee	69,570	139,141	84,996	142,219
Waiting List Opening	0	0	9,996	10,000
Prop. Mgmt. - Admin Costs	420,612	841,224	972,456	863,093
Prop. Mgmt. - Advertising and Promotions	136,866	273,732	261,240	274,315
<b>Total Office Expenses</b>	<b>2,965,020</b>	<b>5,930,039</b>	<b>5,433,552</b>	<b>6,220,965</b>
<b>Management Fees</b>				
Management Fees	685,280	1,370,560	1,011,132	1,184,400
Prop. Mgmt. - Management Fees	287,488	574,977	719,124	615,637
Asset Management Fees	2,324,404	4,648,808	0	1,025,156
Bookkeeping Fees	275,843	551,685	332,076	450,000
<b>Total Management Fees</b>	<b>3,573,015</b>	<b>7,146,030</b>	<b>2,062,332</b>	<b>3,275,193</b>
<b>Total Administrative Expenses</b>	<b>14,757,047</b>	<b>29,514,094</b>	<b>26,101,092</b>	<b>29,072,123</b>
<b>Tenant Services</b>				
<b>Tenant Services- Salaries</b>				
Tenant Services - Salaries Reg	626,831	1,253,662	1,296,972	897,569
Tenant Services - Salaries OT	270	540	0	0
<b>Total Tenant Services - Salaries</b>	<b>627,101</b>	<b>1,254,202</b>	<b>1,296,972</b>	<b>897,569</b>
<b>Tenant Services - Youth Educational Success</b>				
A/B Honor Roll/Perfect Attendance	12,386	24,771	24,996	25,000
Collaborating with Priority One Schools		0	504	500
Comprehensive Youth Development Club	70,000	140,000	200,004	210,000
In School Case Management/Tutoring	254,167	508,333	600,000	650,000
Scholarship Marketing	5,978	11,957	8,760	8,000
School Supplies	10,616	21,232	9,996	10,000
Youth Leadership Lifeskills & Service	3,000	6,000	27,996	15,000
Youth Stem/Steam Programming	16,200	32,400	6,996	61,392
HACA Resident Scholarships	73,500	147,000	79,992	80,000
<b>Total Tenant Services - Youth Educ Success</b>	<b>445,847</b>	<b>891,693</b>	<b>959,244</b>	<b>1,059,892</b>
<b>Tenant Services - Workforce Development</b>				
Apprenticeship Stipends	18,346	36,691	108,888	10,000
Childcare Program - Voucher	367	734	5,004	5,000
Education and Training	1,485	2,969	30,000	5,000
Incentives	1,748	3,495	53,616	3,000
Parenting Classes	6,774	13,549	20,004	15,000
Transportation Assistance	0	0	2,004	1,000
Workforce Development Services	29,969	59,939	80,004	80,000
<b>Total Tenant Services - Workforce Development</b>	<b>58,688</b>	<b>117,377</b>	<b>299,520</b>	<b>119,000</b>
<b>Tenant Services - Community Initiatives</b>				
Community Grants/Donations	27,667	55,333	5,004	21,000
Citywide Advisory Board Support	800	1,600	3,996	4,000
Community Building	6,425	12,849	50,004	37,376

**HOUSING AUTHORITY OF THE CITY OF AUSTIN**  
**ALL NON-PBRA PROGRAMS AND DEPARTMENTS COMBINED**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Community Educational Events	5,805	11,610	30,000	25,000
Elderly Supportive Services	134,314	268,628	224,004	245,000
Homeownership grants	0	0	996	301,000
Program Outreach & Marketing	0	0	3,996	1,000
Supportive Services	36,884	73,767	79,992	2,500
<b>Total Tenant Services - Community Initiatives</b>	<b>211,894</b>	<b>423,787</b>	<b>397,992</b>	<b>636,876</b>
<b>Tenant Services - Digital Inclusion</b>				
Computer Equipment	141	283	55,500	20,000
Adult Digital Literacy Training	0	0	261,516	5,000
<b>Total Tenant Services - Digital Inclusion</b>	<b>141</b>	<b>283</b>	<b>317,016</b>	<b>25,000</b>
<b>Tenant Services - FSS Support Services</b>				
Program Coordinating Committee & Partner Events	0	0	504	500
Bankquet/Recruitment and Marketing	471	942	5,004	9,000
FSS GED Incentives	1,399	2,797	24,996	3,000
FSS Support Services	43,813	87,627	20,004	46,000
<b>Total Tenant Services - FSS Support Services</b>	<b>45,683</b>	<b>91,367</b>	<b>50,508</b>	<b>58,500</b>
<b>Total Tenant Services</b>	<b>1,389,354</b>	<b>2,778,709</b>	<b>3,321,252</b>	<b>2,796,837</b>
<b>Utilities</b>				
Water	401,465	802,929	772,224	829,480
Electricity	135,691	271,382	277,764	330,920
Gas	34,194	68,388	81,396	87,520
<b>Total Utilities</b>	<b>571,350</b>	<b>1,142,700</b>	<b>1,131,384</b>	<b>1,247,920</b>
<b>Ordinary Maintenance &amp; Operations</b>				
<b>Maintenance Labor</b>				
Ordinary Maint. & Operations- Labor Regular	170,075	340,150	386,604	408,225
Ordinary Maint. & Operations- Labor OT	26,052	52,105	27,000	20,000
Ordinary Maint. & Operations- Labor Temp	315	629	0	0
Prop. Mgmt. Maintenance Labor	495,508	991,016	929,892	921,654
<b>Total Maintenance Labor</b>	<b>691,950</b>	<b>1,383,900</b>	<b>1,343,496</b>	<b>1,349,879</b>
<b>Ordinary Maint. &amp; Operations- Materials</b>				
Materials - Custodial	6,973	13,946	12,096	21,000
Materials - Electrical	0	0	504	3,000
Materials - Plumbing	582	1,164	504	2,000
Materials - Lawn Care/ Grounds	383	766	2,508	2,000
Materials - Tools & Equipment	4,016	8,032	7,008	7,000
Materials - HVAC / Heating / Cooling	6,770	13,541	6,504	9,000
Materials - Gas & Oil	9,925	19,850	19,356	17,700
Materials - Auto Parts	947	1,894	6,012	5,700
Materials - Exterior Lighting	160	320	2,496	2,500
Materials - Paint and Painting Supplies	79	157	204	200
Materials - Flooring & Ceiling	530	1,060	204	3,000
Materials - Appliances & Parts	670	1,340	204	200
Materials - Hardware/Locks	393	786	204	1,000
Materials - Safety Equipment	1,649	3,298	2,004	2,500
Materials - Pest Control	0	0	204	200
Materials - Lumber Sheetrock	45	89	204	200
Materials - Water Heaters/Boilers & Parts	0	0	204	500
<b>Total Materials</b>	<b>33,121</b>	<b>66,241</b>	<b>60,420</b>	<b>77,700</b>
<b>Contracts - Maintenance</b>				

**HOUSING AUTHORITY OF THE CITY OF AUSTIN**  
**ALL NON-PBRA PROGRAMS AND DEPARTMENTS COMBINED**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Contracts - Trash Removal	30,437	60,874	53,256	35,000
Contracts - In-House Bulk Trash	1,275	2,550	3,996	20,000
Contracts - HVAC	26,952	53,905	42,000	52,000
Contracts - Elevator Maint.	5,668	11,337	15,000	25,000
Contracts - Landscape/Grounds	32,938	65,876	72,492	67,784
Contracts - Tree Trimming	12,000	24,000	15,000	25,000
Contracts - Electrical Contracts	4,688	9,377	6,504	20,000
Contracts - Plumbing Contracts	1,307	2,615	3,000	7,000
Contracts - Pest Control	4,830	9,660	11,604	12,600
Contracts - Janitorial Contracts	58,443	116,886	111,996	151,200
Contracts - Fire Protection	8,676	17,353	17,004	35,300
Contracts - Door & Window Repairs	1,349	2,698	2,004	2,000
Contracts - Building & Equipment Repairs	15,055	30,109	3,996	23,000
Contracts - Painting	0	0	708	75,000
Contracts - Equipment Rental	0	0	2,004	2,000
Contracts - Maintenance & Repairs	0	0	12,504	29,000
Contracts - Key & Lock Services	520	1,040	4,500	3,000
Contract - Vehicle Repairs/ Maintenance	24,679	49,358	26,484	60,250
Contracts - Uniforms	1,946	3,892	7,500	17,500
Contracts - Roofing	0	0	1,500	1,000
Prop Mgmt. Cleaning & Decorating	367,990	735,981	584,592	733,882
Prop. Mgmt. Maintenance & Repair	432,534	865,068	761,148	851,469
Prop. Mgmt Contract Services	268,072	536,143	489,648	532,580
<b>Total Maintenance Contracts</b>	<b>1,299,360</b>	<b>2,598,720</b>	<b>2,248,440</b>	<b>2,781,565</b>
<b>Total Ordinary Maintenance &amp; Operations</b>	<b>2,024,431</b>	<b>4,048,862</b>	<b>3,652,356</b>	<b>4,209,144</b>
<b>Protective Services</b>				
Crime Prevention/Safety	400	800	0	0
Police Liaison	8,619	17,237	27,996	9,960
Protective Services- Equipments	25,618	51,237	41,664	217,027
Protective Services- Contracts	1,507	3,013	16,296	4,300
Prop Mgmt - Security Contracts/Services	91,554	183,109	205,176	170,572
<b>Total Protective Services</b>	<b>127,698</b>	<b>255,396</b>	<b>291,132</b>	<b>401,859</b>
<b>General Expenses</b>				
<b>Insurance</b>				
Property Insurance	49,483	98,966	38,148	94,659
Liability Insurance	37,154	74,309	78,108	117,850
Workmen's Compensation	47,307	94,614	103,068	110,352
Fidelity Bond Insurance	50,477	100,953	105,060	107,161
Automobile Insurance	10,088	20,176	20,268	53,760
Auto Physical Liability	11,356	22,712	22,212	57,938
Mobile Equipment Insurance Expense	242	484	624	1,244
Crime Prevention Insurance	2,741	5,482	7,548	13,251
Business Owners Insurance	117,574	235,148	235,728	471,464
Prop. Mgmt. - Insurance	391,029	782,059	949,920	931,379
<b>Total Insurance</b>	<b>717,452</b>	<b>1,434,903</b>	<b>1,560,684</b>	<b>1,959,058</b>
<b>Employee Benefits Contribution</b>				
FICA Employers Share - Admin	521,910	1,043,821	1,238,628	1,317,870
FICA Employers Share - Tenant Serv	37,213	74,426	98,280	78,561
FICA Employers Share - Maintenance	13,503	27,007	28,548	30,981
Medical Benefits - Admin	1,867,117	3,734,233	3,919,668	4,382,045
Medical Benefits - Tenant Serv	141,454	282,907	382,368	315,046
Medical Benefits - Maintenance	51,722	103,444	114,852	138,273

**HOUSING AUTHORITY OF THE CITY OF AUSTIN**  
**ALL NON-PBRA PROGRAMS AND DEPARTMENTS COMBINED**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Retirement Benefits - Admin	1,007,750	2,015,501	2,089,128	2,093,210
Retirement Benefits - Tenant Serv	71,487	142,974	166,788	109,245
Retirement Benefits - Maintenance	23,081	46,162	51,048	48,382
Fed & State Unemployment - Admin	1,336	2,672	16,080	17,370
Fed & State Unemployment - Tenant Serv	0	1	1,896	1,260
Fed & State Unemployment - Maintenance	14	28	552	540
Life Insurance - Admin	10,153	20,306	15,552	21,889
Life Insurance - Tenant Serv	676	1,352	1,380	1,192
Life Insurance - Maintenance	247	495	420	586
Disability Insurance - Admin	14,431	28,863	28,116	32,039
Disability Insurance - Tenant Serv	1,121	2,242	2,664	1,867
Disability Insurance - Maintenance	387	774	816	878
Prop. Mgmt. Payroll Admin Benefits - Admin	57,777	115,553	129,828	144,484
Prop. Mgmt. Payroll Maint. Benefits - Maintenance	67,932	135,865	166,824	147,458
<b>Total Employee Benefits Contribution</b>	<b>3,889,313</b>	<b>7,778,627</b>	<b>8,453,436</b>	<b>8,883,176</b>
<b>Interest Expense</b>				
Interest on Notes Payable	714,393	1,428,787	1,416,336	1,406,121
<b>Total Interest Expense</b>	<b>714,393</b>	<b>1,428,787</b>	<b>1,416,336</b>	<b>1,406,121</b>
<b>Other General Expense</b>				
PILOT	0	0	88,104	88,104
<b>Total Other General Expenses</b>	<b>0</b>	<b>0</b>	<b>88,104</b>	<b>88,104</b>
<b>Total General Expenses</b>	<b>5,321,158</b>	<b>10,642,317</b>	<b>11,518,560</b>	<b>12,336,459</b>
<b>Total Operating Expenses</b>	<b>24,191,038</b>	<b>48,382,077</b>	<b>46,015,776</b>	<b>50,064,342</b>
<b>NET OPERATING INCOME (LOSS)</b>	<b>388,547,070</b>	<b>777,094,140</b>	<b>738,286,008</b>	<b>831,222,964</b>
<b>Non-Routine Expenses</b>				
Casualty Losses- Non-capitalized	1,287,437	2,574,873	24	63,700
Severance Expense	33,725	67,450	0	0
HAP Payments	373,750,415	747,500,831	724,346,736	814,479,259
UAP Payments	1,438,068	2,876,136	0	0
Port Out HAP	1,494,548	2,989,096	0	2,967,300
Portability In	381,721	763,442	0	2,670,576
FSS Escrow Contributions	275,169	550,339	0	528,000
Port-Out UAP	34,517	69,034	0	0
<b>Total Non-Routine Expenses</b>	<b>378,695,600</b>	<b>757,391,200</b>	<b>724,346,760</b>	<b>820,708,835</b>
<b>Donations &amp; Transfers</b>				
Operating Transfers Out	490,200	980,400	554,748	427,750
<b>Total Donations &amp; Transfers</b>	<b>490,200</b>	<b>980,400</b>	<b>554,748</b>	<b>427,750</b>
<b>Net Income (Loss)</b>	<b>9,361,270</b>	<b>18,722,540</b>	<b>13,384,500</b>	<b>10,086,379</b>

**HACA CENTRAL OFFICE COST CENTER  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Tenant Revenue</b>				
Non-Dwelling Rental	108,150	216,300	216,300	216,300
<b>Total Tenant Revenue</b>	<b>108,150</b>	<b>216,300</b>	<b>216,300</b>	<b>216,300</b>
<b>Investment Income</b>				
Investment Income - Unrestricted - Admin	469,657	939,315	401,676	300,000
<b>Total Investment Income</b>	<b>469,657</b>	<b>939,315</b>	<b>401,676</b>	<b>300,000</b>
<b>Interest Income</b>				
Interest on Bank Accounts	53,438	106,875	144,000	120,000
<b>Total Interest Income</b>	<b>53,438</b>	<b>106,875</b>	<b>144,000</b>	<b>120,000</b>
<b>Other Revenue</b>				
Management Fee	1,004,714	2,009,429	1,186,020	1,869,181
Bookkeeping Fee	275,843	551,685	332,076	450,000
Application Fees	(300)	(600)	0	0
Asset Management Fees	5,000	10,000	0	0
Bulk Trash Revenue	24,731	49,463	39,996	50,000
Miscellaneous Income	12,646	25,291	12,996	12,000
Other Income - Misc	11,273	22,546	81,000	81,000
<b>Total Other Revenue</b>	<b>1,333,907</b>	<b>2,667,813</b>	<b>1,652,088</b>	<b>2,462,181</b>
<b>Total Revenue</b>	<b>1,965,151</b>	<b>3,930,303</b>	<b>2,414,064</b>	<b>3,098,481</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Salaries</b>				
Admin Salaries - Regular	2,752,833	5,505,667	5,659,002	5,970,134
Admin Salaries - Temp	0	0	1,500	0
Admin Salaries - Overtime	2,522	5,043	3,000	2,000
Incentive Pay	186,322	372,643	1,009,704	1,250,000
Compensated Absences	0	0	281,988	313,753
<b>Total Salaries</b>	<b>2,941,676</b>	<b>5,883,353</b>	<b>6,955,194</b>	<b>7,535,887</b>
<b>Legal Expense</b>				
Legal Expense	127,274	254,547	105,000	157,000
<b>Total Legal Expenses</b>	<b>127,274</b>	<b>254,547</b>	<b>105,000</b>	<b>157,000</b>
<b>Travel &amp; Training</b>				
Staff Training	21,399	42,797	68,598	65,500
Staff Training - Strategic Planning	0	0	60,000	10,000
Travel - Airlines	9,759	19,518	33,012	36,500
Travel - Lodging	15,919	31,837	43,800	60,000
Travel - Car Transportation	2,053	4,107	6,156	6,350
Travel - Mileage	265	529	0	150
Per Diem	2,297	4,595	7,704	11,500
Misc Travel	181	361	1,104	1,800
Travel - Conference Fees	9,254	18,509	40,704	48,200
<b>Total Travel &amp; Training</b>	<b>61,126</b>	<b>122,253</b>	<b>261,078</b>	<b>240,000</b>
<b>Auditing Fees</b>				

**HACA CENTRAL OFFICE COST CENTER  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Auditing Fees	75,920	151,840	99,996	120,000
<b>Total Audit Fees</b>	<b>75,920</b>	<b>151,840</b>	<b>99,996</b>	<b>120,000</b>
<b>Office Expenses</b>				
Office Supplies	6,047	12,094	14,958	15,600
Postage, Couriers, Express Mail	6,306	12,612	8,502	8,500
Printing	4,277	8,554	18,006	15,250
Advertising and Marketing	44,070	88,140	44,004	52,500
Membership Dues and Fees	13,231	26,463	61,644	60,940
Telephone	33,810	67,620	113,784	116,807
Internet / Cable	11,281	22,562	15,276	27,489
Office Custodial	46	92	504	500
Maint. Agreement - Office Equipment	97,433	194,867	737,124	901,086
Computer Equipment	34,534	69,069	38,004	83,000
Equipment Leases	9,786	19,572	23,400	19,000
Office Equipment/Furniture	12,770	25,540	2,004	4,100
Admin Contractors	0	0	2,004	2,000
Meeting	6,465	12,930	53,760	34,250
Misc. Expenses	55,057	110,115	103,800	38,800
Subscriptions	10,327	20,654	22,002	29,104
Bank Charges	25,161	50,323	2,400	50,000
Internship	16,530	33,060	60,000	130,416
Consultants	109,681	219,362	291,000	600,000
Credit Check	57,817	115,634	84,252	102,550
Criminal Check	7,992	15,984	9,000	12,500
Employee Physical /Drug Test	1,815	3,630	6,504	5,000
Interpreter Fee	32	64	5,256	2,750
Software	417,793	835,585	313,968	301,536
Storage Lease	5,772	11,544	9,996	12,000
Document Shredding	424	847	1,008	1,000
Breakroom Supplies	12,091	24,181	9,996	30,000
Sponsorships/Industry Contributions	34,550	69,100	99,996	75,000
Wellness Program	0	0	5,004	6,000
Permits, Licenses & Certificates	169	338	1,008	900
Inspections	33	65	9,864	100
HACA Family Scholarship	62,500	125,000	75,000	75,000
Tuition Reimbursement	0	0	9,996	10,000
Employee Referral Program	1,000	2,000	5,004	3,000
Recruiting	0	0	7,500	7,500
Collection Agency Fees	0	0	96	100
Waiting List Opening	0	0	4,998	5,000
<b>Total Office Expenses</b>	<b>1,098,801</b>	<b>2,197,602</b>	<b>2,270,622</b>	<b>2,839,278</b>
<b>Total Administrative Expenses</b>	<b>4,304,798</b>	<b>8,609,595</b>	<b>9,691,890</b>	<b>10,892,165</b>
<b>Tenant Services</b>				
<b>Tenant Services - Workforce Development</b>				
Education and Training	394	788	0	0
<b>Total Tenant Services - Workforce Development</b>	<b>394</b>	<b>788</b>	<b>0</b>	<b>0</b>
<b>Tenant Services - Digital Inclusion</b>				

**HACA CENTRAL OFFICE COST CENTER  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Computer Equipment	141	283	0	0
<b>Total Tenant Services - Digital Inclusion</b>	<b>141</b>	<b>283</b>	<b>0</b>	<b>0</b>
<b>Total Tenant Services</b>	<b>535</b>	<b>1,070</b>	<b>0</b>	<b>0</b>
<b>Utilities</b>				
Water	27,648	55,296	60,000	60,000
Electricity	66,761	133,523	150,000	150,000
Gas	2,379	4,758	12,000	6,000
<b>Total Utilities</b>	<b>96,789</b>	<b>193,577</b>	<b>222,000</b>	<b>216,000</b>
<b>Ordinary Maintenance &amp; Operations</b>				
<b>Maintenance Labor</b>				
Ordinary Maint. & Operations- Labor Regular	170,075	340,150	386,604	408,225
Ordinary Maint. & Operations- Labor OT	26,052	52,105	27,000	20,000
Ordinary Maint. & Operations- Labor Temp	315	629	0	0
<b>Total Maintenance Labor</b>	<b>196,442</b>	<b>392,884</b>	<b>413,604</b>	<b>428,225</b>
<b>Ordinary Maint. &amp; Operations- Materials</b>				
Materials - Custodial	6,922	13,843	12,000	20,000
Materials - Electrical	(8)	(17)	504	3,000
Materials - Plumbing	590	1,181	504	2,000
Materials - Lawn Care/ Grounds	383	766	504	2,000
Materials - Tools & Equipment	3,883	7,765	7,008	7,000
Materials - HVAC / Heating / Cooling	1,337	2,674	3,000	5,500
Materials - Gas & Oil	7,389	14,779	16,200	14,500
Materials - Auto Parts	947	1,894	4,512	4,500
Materials - Exterior Lighting	160	320	2,496	2,500
Materials - Paint and Painting Supplies	73	145	204	200
Materials - Flooring & Ceiling	530	1,060	204	3,000
Materials - Appliances & Parts	670	1,340	204	200
Materials - Hardware/Locks	393	786	204	1,000
Materials - Safety Equipment	1,649	3,298	2,004	2,500
Materials - Pest Control	0	0	204	200
Materials - Lumber Sheetrock	45	89	204	200
Materials - Water Heaters/Boilers & Parts	0	0	204	500
<b>Total Materials</b>	<b>24,960</b>	<b>49,921</b>	<b>50,160</b>	<b>68,800</b>
<b>Contracts - Maintenance</b>				
Contracts - Trash Removal	24,517	49,034	50,004	35,000
Contracts - In-House Bulk Trash	0	0	3,996	20,000
Contracts - HVAC	26,344	52,687	30,000	50,000
Contracts - Elevator Maint.	5,143	10,287	15,000	25,000
Contracts - Landscape/Grounds	8,543	17,086	30,000	30,000
Contracts - Tree Trimming	9,000	18,000	9,996	20,000
Contracts - Electrical Contracts	4,312	8,623	5,004	10,000
Contracts - Plumbing Contracts	0	0	2,004	5,000
Contracts - Pest Control	2,325	4,650	6,000	7,000
Contracts - Janitorial Contracts	53,273	106,545	99,996	150,000
Contracts - Fire Protection	8,676	17,353	12,000	30,000
Contracts - Door & Window Repairs	655	1,310	2,004	2,000
Contracts - Building & Equipment Repairs	7,621	15,242	3,996	23,000

**HACA CENTRAL OFFICE COST CENTER**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Contracts - Painting	0	0	504	75,000
Contracts - Equipment Rental	0	0	2,004	2,000
Contracts - Maintenance & Repairs	0	0	2,004	20,000
Contracts - Key & Lock Services	375	750	3,000	3,000
Contract - Vehicle Repairs/ Maintenance	21,560	43,120	21,492	54,750
Contracts - Uniforms	1,946	3,892	7,500	17,500
<b>Total Maintenance Contracts</b>	<b>174,289</b>	<b>348,579</b>	<b>306,504</b>	<b>579,250</b>
<b>Total Ordinary Maintenance &amp; Operations</b>	<b>395,692</b>	<b>791,383</b>	<b>770,268</b>	<b>1,076,275</b>
<b>Protective Services</b>				
Police Liaison	4,309	8,619	27,996	0
Protective Services- Equipments	25,175	50,350	24,996	200,300
Protective Services- Contracts	704	1,407	2,496	2,500
<b>Total Protective Services</b>	<b>30,188</b>	<b>60,376</b>	<b>55,488</b>	<b>202,800</b>
<b>General Expenses</b>				
<b>Insurance</b>				
Property Insurance	8,735	17,470	18,144	36,282
Liability Insurance	17,048	34,095	39,420	78,850
Workmen's Compensation	18,680	37,360	45,438	41,813
Automobile Insurance	8,070	16,141	16,620	33,250
Auto Physical Liability	9,085	18,169	18,720	37,428
Mobile Equipment Insurance Expense	242	484	624	1,244
Crime Prevention Insurance	2,741	5,482	5,652	11,294
Business Owners Insurance	117,574	235,148	235,728	471,464
<b>Total Insurance</b>	<b>182,175</b>	<b>364,350</b>	<b>380,346</b>	<b>711,625</b>
<b>Employee Benefits Contribution</b>				
FICA Employers Share - Admin	212,548	425,095	578,682	629,080
FICA Employers Share - Maintenance	13,503	27,007	28,548	30,981
Medical Benefits - Admin	632,713	1,265,426	1,320,690	1,503,802
Medical Benefits - Maintenance	51,722	103,444	114,852	138,273
Retirement Benefits - Admin	431,556	863,112	842,004	895,701
Retirement Benefits - Maintenance	23,081	46,162	51,048	48,382
Fed & State Unemployment - Admin	360	721	5,082	5,580
Fed & State Unemployment - Maintenance	14	28	552	540
Life Insurance - Admin	4,313	8,626	5,970	7,991
Life Insurance - Maintenance	247	495	420	586
Disability Insurance - Admin	5,358	10,716	10,308	11,136
Disability Insurance - Maintenance	387	774	816	878
<b>Total Employee Benefits Contribution</b>	<b>1,375,803</b>	<b>2,751,606</b>	<b>2,958,972</b>	<b>3,272,929</b>
<b>Total General Expenses</b>	<b>1,557,978</b>	<b>3,115,956</b>	<b>3,339,318</b>	<b>3,984,554</b>
<b>Total Operating Expenses</b>	<b>6,385,979</b>	<b>12,771,958</b>	<b>14,078,964</b>	<b>16,371,794</b>
<b>NET OPERATING INCOME (LOSS)</b>	<b>(4,420,828)</b>	<b>(8,841,655)</b>	<b>(11,664,900)</b>	<b>(13,273,313)</b>
<b>Net Income (Loss)</b>	<b>(4,420,828)</b>	<b>(8,841,655)</b>	<b>(11,664,900)</b>	<b>(13,273,313)</b>

**ASSISTED HOUSING**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Fraud Recovery</b>				
Fraud Recovery- Housing Assistance Payments	4,263	8,526	9,996	10,000
<b>Total Fraud Recovery</b>	<b>164,000</b>	<b>8,526</b>	<b>9,996</b>	<b>10,000</b>
<b>Operating Grants</b>				
HAP Subsidy	799,569	1,599,138	1,912,776	2,254,678
HAP Admin Fees	3,871,531	7,743,062	6,733,128	7,490,798
Port In HAP/URP	384,379	768,758	0	2,670,576
Port In Admin Fees	11,827	23,655	0	105,616
HAP Admin Fees - EHV Service Fees	36,421	72,843	69,996	0
HUD FSS Grant Revenue	202,909	405,817	502,560	515,125
HCV HAP	55,255,784	110,511,568	105,172,392	100,925,813
Grants Revenue	191,435	382,870	409,752	6,032,271
FSS Recapture	0	0	0	12,000
<b>Total Operating Grants</b>	<b>60,753,855</b>	<b>121,507,711</b>	<b>114,800,604</b>	<b>120,006,877</b>
<b>Interest Income</b>				
Interest on Bank Accounts	31,094	62,189	9,996	20,000
<b>Total Interest Income</b>	<b>31,094</b>	<b>62,189</b>	<b>9,996</b>	<b>20,000</b>
<b>Other Revenue</b>				
Miscellaneous Income	36,153	72,306	26,004	0
<b>Total Other Revenue</b>	<b>36,153</b>	<b>72,306</b>	<b>26,004</b>	<b>0</b>
<b>Total Revenue</b>	<b>60,825,366</b>	<b>121,650,731</b>	<b>114,846,600</b>	<b>120,036,877</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Salaries</b>				
Admin Salaries - Regular	1,634,890	3,269,779	3,432,414	3,416,084
Admin Salaries - Temp	0	0	1,500	0
Admin Salaries - Overtime	6,567	13,134	12,000	0
Incentive Pay	4,611	9,222	0	0
Compensated Absences	0	0	206,916	166,069
<b>Total Salaries</b>	<b>1,646,068</b>	<b>3,292,135</b>	<b>3,652,830</b>	<b>3,582,153</b>
<b>Legal Expense</b>				
Legal Expense	13,721	27,442	5,004	15,000
<b>Total Legal Expenses</b>	<b>13,721</b>	<b>27,442</b>	<b>5,004</b>	<b>15,000</b>
<b>Travel &amp; Training</b>				
Staff Training	8,564	17,127	27,330	22,470
Travel - Airlines	0	0	3,000	1,300
Travel - Lodging	0	0	3,996	2,530
Travel - Car Transportation	1,260	2,520	2,004	0
Per Diem	0	0	2,004	750
Travel - Conference Fees	548	1,095	996	1,000
<b>Total Travel &amp; Training</b>	<b>10,371</b>	<b>20,742</b>	<b>39,330</b>	<b>28,050</b>
<b>Auditing Fees</b>				
Auditing Fees	18,330	36,660	24,000	27,000
<b>Total Audit Fees</b>	<b>18,330</b>	<b>36,660</b>	<b>24,000</b>	<b>27,000</b>
<b>Office Expenses</b>				

**ASSISTED HOUSING  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Office Supplies	5,184	10,368	15,402	10,500
Postage, Couriers, Express Mail	28,051	56,102	40,254	47,250
Printing	6,580	13,159	6,750	10,750
Advertising and Marketing	3,547	7,093	9,000	6,500
Membership Dues and Fees	0	0	996	1,000
Telephone	1,882	3,763	3,000	3,000
Equipment Leases	4,425	8,851	12,000	12,000
Office Equipment/Furniture	181	362	0	0
Meeting	372	744	5,004	5,000
Misc. Expenses	348	695	300	300
Subscriptions	271	542	1,062	1,064
Credit Check	32,729	65,458	36,252	56,250
Criminal Check	4,676	9,353	11,004	6,000
Interpreter Fee	128	256	2,748	1,250
Software	121,499	242,997	227,496	257,500
Document Shredding	2,384	4,768	1,248	1,250
Inspections	39,505	79,010	80,004	80,000
Port-Out Admin Fee	69,570	139,141	84,996	142,219
Waiting List Opening	0	0	4,998	5,000
<b>Total Office Expenses</b>	<b>321,331</b>	<b>642,662</b>	<b>542,514</b>	<b>646,833</b>
<b>Management Fees</b>				
Management Fees	441,348	882,696	531,312	720,000
Bookkeeping Fees	275,843	551,685	332,076	450,000
<b>Total Management Fees</b>	<b>717,191</b>	<b>1,434,381</b>	<b>863,388</b>	<b>1,170,000</b>
<b>Total Administrative Expenses</b>	<b>2,727,011</b>	<b>5,454,023</b>	<b>5,127,066</b>	<b>5,469,036</b>
<b>Tenant Services</b>				
<b>Tenant Services- Salaries</b>				
Tenant Services - Salaries Reg	155,108	310,216	316,056	324,082
<b>Total Tenant Services - Salaries</b>	<b>155,108</b>	<b>310,216</b>	<b>316,056</b>	<b>324,082</b>
<b>Tenant Services - Community Initiatives</b>				
Supportive Services	36,811	73,623	69,996	15,000
<b>Total Tenant Services - Community Initiatives</b>	<b>36,421</b>	<b>73,623</b>	<b>69,996</b>	<b>15,000</b>
<b>Total Tenant Services</b>	<b>191,919</b>	<b>383,839</b>	<b>386,052</b>	<b>339,082</b>
<b>Ordinary Maintenance &amp; Operations</b>				
<b>Ordinary Maint. &amp; Operations- Materials</b>				
Materials - Gas & Oil	2,301	4,602	3,000	3,000
Materials - Auto Parts	0	0	1,200	1,200
<b>Total Materials</b>	<b>2,301</b>	<b>4,602</b>	<b>4,200</b>	<b>4,200</b>
<b>Contracts - Maintenance</b>				
Contract - Vehicle Repairs/ Maintenance	59	119	3,000	3,000
<b>Total Maintenance Contracts</b>	<b>59</b>	<b>119</b>	<b>3,000</b>	<b>3,000</b>
<b>Total Ordinary Maintenance &amp; Operations</b>	<b>2,360</b>	<b>4,721</b>	<b>7,200</b>	<b>7,200</b>
<b>Protective Services</b>				
Police Liaison	4,309	8,619	12,000	9,960
<b>Total Protective Services</b>	<b>4,309</b>	<b>8,619</b>	<b>12,000</b>	<b>9,960</b>
<b>General Expenses</b>				
<b>Insurance</b>				

**ASSISTED HOUSING  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Liability Insurance	17,586	35,172	38,688	39,000
Workmen's Compensation	11,060	22,120	21,762	24,301
<b>Total Insurance</b>	<b>28,646</b>	<b>57,292</b>	<b>60,450</b>	<b>63,301</b>
<b>Employee Benefits Contribution</b>				
FICA Employers Share - Admin	123,329	246,657	253,002	251,422
FICA Employers Share - Tenant Serv	11,309	22,618	23,244	23,839
Medical Benefits - Admin	574,694	1,149,387	1,179,678	1,258,740
Medical Benefits - Tenant Serv	56,333	112,667	102,252	125,931
Retirement Benefits - Admin	236,991	473,982	455,604	451,760
Retirement Benefits - Tenant Serv	21,205	42,410	41,616	42,484
Fed & State Unemployment - Admin	386	772	4,770	4,680
Fed & State Unemployment - Tenant Serv	0	0	456	450
Life Insurance - Admin	2,287	4,573	3,654	4,877
Life Insurance - Tenant Serv	225	450	348	473
Disability Insurance - Admin	3,670	7,341	7,044	7,503
Disability Insurance - Tenant Serv	355	710	660	726
<b>Total Employee Benefits Contribution</b>	<b>1,030,784</b>	<b>2,061,567</b>	<b>2,072,328</b>	<b>2,172,884</b>
<b>Total General Expenses</b>	<b>1,059,430</b>	<b>2,118,859</b>	<b>2,132,778</b>	<b>2,236,185</b>
<b>Total Operating Expenses</b>	<b>3,985,030</b>	<b>7,970,060</b>	<b>7,665,096</b>	<b>8,061,463</b>
<b>NET OPERATING INCOME (LOSS)</b>	<b>56,840,335</b>	<b>113,680,671</b>	<b>107,181,504</b>	<b>111,975,415</b>
<b>Non-Routine Expenses</b>				
Severance Expense	33,725	67,450	0	0
HAP Payments	51,585,962	103,171,924	107,085,180	105,717,462
UAP Payments	1,438,068	2,876,136	0	0
Port Out HAP	1,494,548	2,989,096	0	2,967,300
Portability In	381,721	763,442	0	2,670,576
FSS Escrow Contributions	275,169	550,339	0	528,000
Port-Out UAP	34,517	69,034	0	0
<b>Total Non-Routine Expenses</b>	<b>55,243,710</b>	<b>110,487,420</b>	<b>107,085,180</b>	<b>111,883,338</b>
<b>Net Income (Loss)</b>	<b>1,596,625</b>	<b>3,193,251</b>	<b>96,324</b>	<b>92,077</b>

**AAHC COCC AND ALL PROPERTIES  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026		FY 2027	
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Tenant Revenue</b>				
Rental Charges	5,178,114	10,356,229	11,200,440	10,863,389
Write-Off / Bad Debt	(116,683)	(233,366)	(110,604)	(193,440)
Non-Dwelling Rental	580,845	1,161,691	1,168,416	1,019,820
<b>Total Tenant Revenue</b>	<b>5,642,277</b>	<b>11,284,554</b>	<b>12,258,252</b>	<b>11,689,769</b>
<b>Investment Income</b>				
Investment Income - Unrestricted - Admin	1,546,525	3,093,050	2,229,384	2,500,000
<b>Total Investment Income</b>	<b>1,546,525</b>	<b>3,093,050</b>	<b>2,229,384</b>	<b>2,500,000</b>
<b>Interest Income</b>				
Interest on Bank Accounts	38,887	77,774	57,600	60,000
<b>Total Interest Income</b>	<b>38,887</b>	<b>77,774</b>	<b>57,600</b>	<b>60,000</b>
<b>Other Revenue</b>				
Developer Fees	1,194,136	2,388,272	3,000,000	3,000,000
Management Fee	166,923	333,847	0	0
Asset Management Fees	2,883,492	5,766,984	0	0
Distribution Revenue	982,845	1,965,689	3,999,996	3,000,000
Land Lease Income	950	1,900	0	0
Acquisition fees	1,798,988	3,597,975	3,500,004	3,500,000
Prior Period Adjustment	12,951	25,903	0	0
Other Income - Misc	2,316,401	4,632,803	1,664,640	1,925,403
<b>Total Other Revenue</b>	<b>9,356,686</b>	<b>18,713,372</b>	<b>12,164,640</b>	<b>11,425,403</b>
<b>Total Revenue</b>	<b>18,879,821</b>	<b>33,168,751</b>	<b>26,709,876</b>	<b>25,675,172</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Salaries</b>				
Admin Salaries - Regular	264,695	529,391	481,296	876,496
Property Mgmt. - Payroll	437,450	874,901	900,072	882,440
Compensated Absences	0	0	26,700	38,898
<b>Total Salaries</b>	<b>702,146</b>	<b>1,404,291</b>	<b>1,408,068</b>	<b>1,797,834</b>
<b>Legal Expense</b>				
Legal Expense	12,560	25,120	0	15,000
<b>Total Legal Expenses</b>	<b>12,560</b>	<b>25,120</b>	<b>0</b>	<b>15,000</b>
<b>Travel &amp; Training</b>				
Staff Training	58	116	1,500	2,000
Travel - Airlines	598	1,197	1,500	2,000
Travel - Lodging	1,056	2,112	3,000	5,000
Travel - Car Transportation	0	0	300	300
Per Diem	0	0	504	500
Travel - Conference Fees	0	0	2,496	2,500
<b>Total Travel &amp; Training</b>	<b>1,712</b>	<b>3,425</b>	<b>9,300</b>	<b>12,300</b>
<b>Auditing Fees</b>				
Auditing Fees	39,000	78,000	42,996	45,000

**AAHC COCC AND ALL PROPERTIES  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>Total Audit Fees</b>	<b>39,000</b>	<b>78,000</b>	<b>42,996</b>	<b>45,000</b>
<b>Office Expenses</b>				
Office Supplies	335	671	1,536	1,500
Postage, Couriers, Express Mail	79	158	504	500
Membership Dues and Fees	2,100	4,199	5,004	5,000
Telephone	1,837	3,673	4,212	3,000
Internet / Cable	0	0	348	0
Office Custodial	0	0	8,004	2,000
Office Equipment/Furniture	0	0	156	150
Meeting	414	828	552	750
Misc. Expenses	37,399	74,797	32,292	5,000
Subscriptions	128	256	4,500	500
Bank Charges	2,975	5,950	3,600	6,000
Consultants	127,166	254,333	120,000	250,000
Software	5	10	0	0
Sponsorships/Industry Contributions	0	0	9,996	10,000
Permits, Licenses & Certificates	217	434	1,200	1,200
Prop. Mgmt. - Admin Costs	413,687	827,375	972,456	863,093
Prop. Mgmt. - Advertising and Promotions	136,866	273,732	261,240	274,315
<b>Total Office Expenses</b>	<b>723,208</b>	<b>1,446,416</b>	<b>1,425,600</b>	<b>1,423,008</b>
<b>Management Fees</b>				
Management Fees	0	0	14,400	0
Prop. Mgmt. - Management Fees	287,488	574,977	719,124	615,637
Asset Management Fees	2,324,404	4,648,808	0	1,025,156
<b>Total Management Fees</b>	<b>2,611,892</b>	<b>5,223,785</b>	<b>733,524</b>	<b>1,640,793</b>
<b>Total Administrative Expenses</b>	<b>4,090,518</b>	<b>8,181,037</b>	<b>3,619,488</b>	<b>4,933,935</b>
<b>Utilities</b>				
Water	357,752	715,505	712,224	769,480
Electricity	68,211	136,423	127,764	180,920
Gas	31,483	62,965	69,396	81,520
<b>Total Utilities</b>	<b>457,447</b>	<b>914,893</b>	<b>909,384</b>	<b>1,031,920</b>
<b>Ordinary Maintenance &amp; Operations</b>				
<b>Maintenance Labor</b>				
Prop. Mgmt. Maintenance Labor	495,508	991,016	929,892	921,654
<b>Total Maintenance Labor</b>	<b>495,508</b>	<b>991,016</b>	<b>929,892</b>	<b>921,654</b>
<b>Ordinary Maint. &amp; Operations- Materials</b>				
Materials - Custodial	51	103	96	1,000
Materials - Lawn Care/ Grounds	0	0	2,004	0
Materials - Tools & Equipment	133	267	0	0
Materials - HVAC / Heating / Cooling	34	67	3,504	3,500
Materials - Gas & Oil	79	158	0	200
Materials - Paint and Painting Supplies	6	12	0	0
<b>Total Materials</b>	<b>304</b>	<b>607</b>	<b>5,604</b>	<b>4,700</b>
<b>Contracts - Maintenance</b>				

**AAHC COCC AND ALL PROPERTIES  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Contracts - Trash Removal	1,468	2,935	3,252	0
Contracts - HVAC	609	1,218	12,000	2,000
Contracts - Elevator Maint.	525	1,050	0	0
Contracts - Landscape/Grounds	20,239	40,478	42,492	37,784
Contracts - Tree Trimming	3,000	6,000	5,004	5,000
Contracts - Electrical Contracts	377	754	1,500	10,000
Contracts - Plumbing Contracts	1,307	2,615	996	2,000
Contracts - Pest Control	2,505	5,010	5,604	5,600
Contracts - Janitorial Contracts	5,170	10,341	12,000	1,200
Contracts - Fire Protection	0	0	5,004	5,300
Contracts - Door & Window Repairs	694	1,388	0	0
Contracts - Building & Equipment Repairs	7,434	14,867	0	0
Contracts - Painting	0	0	204	0
Contracts - Maintenance & Repairs	0	0	10,500	9,000
Contracts - Key & Lock Services	145	290	1,500	0
Contract - Vehicle Repairs/ Maintenance	1,126	2,252	996	1,500
Contracts - Roofing	0	0	1,500	1,000
Prop Mgmt. Cleaning & Decorating	364,808	729,616	584,592	733,882
Prop. Mgmt. Maintenance & Repair	419,968	839,937	761,148	851,469
Prop. Mgmt Contract Services	256,973	513,947	489,648	532,580
<b>Total Maintenance Contracts</b>	<b>1,086,349</b>	<b>2,172,697</b>	<b>1,937,940</b>	<b>2,198,315</b>
<b>Total Ordinary Maintenance &amp; Operations</b>	<b>1,582,160</b>	<b>3,164,321</b>	<b>2,873,436</b>	<b>3,124,669</b>
<b>Protective Services</b>				
Protective Services- Equipments	443	886	16,164	16,727
Protective Services- Contracts	803	1,606	1,800	1,800
Prop Mgmt - Security Contracts/Services	91,554	183,109	205,176	170,572
<b>Total Protective Services</b>	<b>92,801</b>	<b>185,602</b>	<b>223,140</b>	<b>189,099</b>
<b>General Expenses</b>				
<b>Insurance</b>				
Property Insurance	70,748	141,496	20,004	58,377
Workmen's Compensation	1,622	3,244	2,544	6,755
Prop. Mgmt. - Insurance	385,354	770,709	949,920	931,379
<b>Total Insurance</b>	<b>457,725</b>	<b>915,450</b>	<b>972,468</b>	<b>996,511</b>
<b>Employee Benefits Contribution</b>				
FICA Employers Share - Admin	19,853	39,706	35,400	64,473
Medical Benefits - Admin	35,330	70,659	53,304	131,806
Retirement Benefits - Admin	44,616	89,233	79,164	105,767
Fed & State Unemployment - Admin	0	0	276	720
Life Insurance - Admin	379	758	516	1,471
Disability Insurance - Admin	472	945	792	1,999
Prop. Mgmt. Payroll Admin Benefits - Admin	57,777	115,553	129,828	144,484
Prop. Mgmt. Payroll Maint. Benefits - Maintenance	67,932	135,865	166,824	147,458
<b>Total Employee Benefits Contribution</b>	<b>226,359</b>	<b>452,718</b>	<b>466,104</b>	<b>598,178</b>
<b>Interest Expense</b>				
Interest on Notes Payable	714,393	1,428,787	1,416,336	1,406,121
<b>Total Interest Expense</b>	<b>714,393</b>	<b>1,428,787</b>	<b>1,416,336</b>	<b>1,406,121</b>

**AAHC COCC AND ALL PROPERTIES  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026		FY 2027
	PTD Actual	Annualized PTD	Requested Budget
<b>Other General Expense</b>			
PILOT	0	0	88,104
<b>Total Other General Expenses</b>	<b>0</b>	<b>0</b>	<b>88,104</b>
<b>Total General Expenses</b>	<b>1,398,477</b>	<b>2,796,954</b>	<b>2,943,012</b>
<b>Total Operating Expenses</b>	<b>7,621,403</b>	<b>15,242,807</b>	<b>12,368,537</b>
<b>NET OPERATING INCOME (LOSS)</b>	<b>8,962,972</b>	<b>17,925,944</b>	<b>16,141,416</b>
<b>Non-Routine Expenses</b>			
Casualty Losses- Non-capitalized	1,287,437	2,574,873	0
<b>Total Non-Routine Expenses</b>	<b>1,287,437</b>	<b>2,574,873</b>	<b>0</b>
<b>Net Income (Loss)</b>	<b>7,675,535</b>	<b>15,351,071</b>	<b>13,242,935</b>

**AAHC CENTRAL OFFICE COST CENTER  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Tenant Revenue</b>				
Non-Dwelling Rental	120,800	241,600	246,000	102,000
<b>Total Tenant Revenue</b>	<b>120,800</b>	<b>241,600</b>	<b>246,000</b>	<b>102,000</b>
<b>Investment Income</b>				
Investment Income - Unrestricted - Admin	1,546,525	3,093,050	2,229,384	2,500,000
<b>Total Investment Income</b>	<b>1,546,525</b>	<b>3,093,050</b>	<b>2,229,384</b>	<b>2,500,000</b>
<b>Interest Income</b>				
Interest on Bank Accounts	38,887	77,774	57,600	60,000
<b>Total Interest Income</b>	<b>2,334,333</b>	<b>77,774</b>	<b>57,600</b>	<b>60,000</b>
<b>Other Revenue</b>				
Developer Fees	1,194,136	2,388,272	3,000,000	3,000,000
Management Fee	166,923	333,847	0	0
Asset Management Fees	2,883,492	5,766,984	0	0
Distribution Revenue	982,845	1,965,689	3,999,996	3,000,000
Land Lease Income	950	1,900	0	0
Acquisition fees	1,798,988	3,597,975	3,500,004	3,500,000
Other Income - Misc	1,210,784	2,421,569	0	0
<b>Total Other Revenue</b>	<b>8,238,118</b>	<b>16,476,235</b>	<b>10,500,000</b>	<b>9,500,000</b>
<b>Total Revenue</b>	<b>9,944,330</b>	<b>19,888,660</b>	<b>13,032,984</b>	<b>12,162,000</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Salaries</b>				
Admin Salaries - Regular	264,695	529,391	481,296	876,496
Compensated Absences	0	0	26,700	38,898
<b>Total Salaries</b>	<b>264,695</b>	<b>529,391</b>	<b>507,996</b>	<b>915,394</b>
<b>Legal Expense</b>				
Legal Expense	12,560	25,120	0	15,000
<b>Total Legal Expenses</b>	<b>12,560</b>	<b>25,120</b>	<b>0</b>	<b>15,000</b>
<b>Travel &amp; Training</b>				
Staff Training	58	116	1,500	2,000
Travel - Airlines	598	1,197	1,500	2,000
Travel - Lodging	1,056	2,112	3,000	5,000
Travel - Car Transportation	0	0	300	300
Per Diem	0	0	504	500
Travel - Conference Fees	0	0	2,496	2,500
<b>Total Travel &amp; Training</b>	<b>1,712</b>	<b>3,425</b>	<b>9,300</b>	<b>12,300</b>
<b>Auditing Fees</b>				
Auditing Fees	39,000	78,000	42,996	45,000
<b>Total Audit Fees</b>	<b>39,000</b>	<b>78,000</b>	<b>42,996</b>	<b>45,000</b>
<b>Office Expenses</b>				
Office Supplies	335	671	1,536	1,500

**AAHC CENTRAL OFFICE COST CENTER  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Postage, Couriers, Express Mail	79	158	504	500
Membership Dues and Fees	2,100	4,199	5,004	5,000
Telephone	1,837	3,673	4,212	3,000
Internet / Cable	0	0	348	0
Office Custodial	0	0	8,004	2,000
Office Equipment/Furniture	0	0	156	150
Meeting	414	828	552	750
Misc. Expenses	0	0	30,168	5,000
Subscriptions	128	256	4,500	500
Bank Charges	2,975	5,950	3,600	6,000
Consultants	127,166	254,333	120,000	250,000
Software	5	10	0	0
Sponsorships/Industry Contributions	0	0	9,996	10,000
Permits, Licenses & Certificates	217	434	1,200	1,200
<b>Total Office Expenses</b>	<b>135,256</b>	<b>270,512</b>	<b>189,780</b>	<b>285,600</b>
<b>Management Fees</b>				
Management Fees	0	0	14,400	0
<b>Total Management Fees</b>	<b>0</b>	<b>0</b>	<b>14,400</b>	<b>0</b>
<b>Total Administrative Expenses</b>	<b>453,224</b>	<b>906,447</b>	<b>764,472</b>	<b>1,273,294</b>
<b>Utilities</b>				
Water	3,457	6,914	2,604	25,300
Electricity	5,534	11,067	4,896	45,700
Gas	1,542	3,084	1,296	4,900
<b>Total Utilities</b>	<b>10,533</b>	<b>21,065</b>	<b>8,796</b>	<b>75,900</b>
<b>Ordinary Maintenance &amp; Operations</b>				
<b>Ordinary Maint. &amp; Operations- Materials</b>				
Materials - Custodial	51	103	96	1,000
Materials - Lawn Care/ Grounds	0	0	2,004	0
Materials - Tools & Equipment	133	267	0	0
Materials - HVAC / Heating / Cooling	34	67	3,504	3,500
Materials - Gas & Oil	79	158	0	200
Materials - Paint and Painting Supplies	6	12	0	0
<b>Total Materials</b>	<b>304</b>	<b>607</b>	<b>5,604</b>	<b>4,700</b>
<b>Contracts - Maintenance</b>				
Contracts - Trash Removal	1,468	2,935	3,252	0
Contracts - HVAC	609	1,218	12,000	2,000
Contracts - Elevator Maint.	525	1,050	0	0
Contracts - Landscape/Grounds	20,239	40,478	42,492	37,784
Contracts - Tree Trimming	3,000	6,000	5,004	5,000
Contracts - Electrical Contracts	377	754	1,500	10,000
Contracts - Plumbing Contracts	1,307	2,615	996	2,000
Contracts - Pest Control	2,505	5,010	5,604	5,600
Contracts - Janitorial Contracts	5,170	10,341	12,000	1,200
Contracts - Fire Protection	0	0	5,004	5,300
Contracts - Door & Window Repairs	694	1,388	0	0

**AAHC CENTRAL OFFICE COST CENTER  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Contracts - Building & Equipment Repairs	7,434	14,867	0	0
Contracts - Painting	0	0	204	0
Contracts - Maintenance & Repairs	0	0	10,500	9,000
Contracts - Key & Lock Services	145	290	1,500	0
Contract - Vehicle Repairs/ Maintenance	1,126	2,252	996	1,500
Contracts - Roofing	0	0	1,500	1,000
<b>Total Maintenance Contracts</b>	<b>44,599</b>	<b>89,198</b>	<b>102,552</b>	<b>80,384</b>
<b>Total Ordinary Maintenance &amp; Operations</b>	<b>44,903</b>	<b>89,805</b>	<b>108,156</b>	<b>85,084</b>
<b>Protective Services</b>				
Protective Services- Equipments	110	220	15,492	5,500
Protective Services- Contracts	803	1,606	1,800	1,800
<b>Total Protective Services</b>	<b>913</b>	<b>1,826</b>	<b>17,292</b>	<b>7,300</b>
<b>General Expenses</b>				
<b>Insurance</b>				
Property Insurance	20,379	40,759	20,004	58,377
Workmen's Compensation	1,622	3,244	2,544	6,755
<b>Total Insurance</b>	<b>22,001</b>	<b>44,003</b>	<b>22,548</b>	<b>65,132</b>
<b>Employee Benefits Contribution</b>				
FICA Employers Share - Admin	19,853	39,706	35,400	64,473
Medical Benefits - Admin	35,330	70,659	53,304	131,806
Retirement Benefits - Admin	44,616	89,233	79,164	105,767
Fed & State Unemployment - Admin	0	0	276	720
Life Insurance - Admin	379	758	516	1,471
Disability Insurance - Admin	472	945	792	1,999
<b>Total Employee Benefits Contribution</b>	<b>100,650</b>	<b>201,300</b>	<b>169,452</b>	<b>306,236</b>
<b>Total General Expenses</b>	<b>122,651</b>	<b>245,303</b>	<b>192,000</b>	<b>371,368</b>
<b>Total Operating Expenses</b>	<b>632,223</b>	<b>1,264,447</b>	<b>1,090,716</b>	<b>1,812,946</b>
<b>NET OPERATING INCOME (LOSS)</b>	<b>9,312,107</b>	<b>18,624,213</b>	<b>11,942,268</b>	<b>10,349,054</b>
<b>Net Income (Loss)</b>	<b>9,312,107</b>	<b>18,624,213</b>	<b>11,942,268</b>	<b>10,349,054</b>

**BLUEPRINT HOUSING SOLUTION**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Other Revenue</b>				
Blueprint - Voucher Processing	13,919	27,838	72,216	90,000
Blueprint - Consulting	40,403	80,807	25,308	10,000
<b>Total Other Revenue</b>	<b>54,323</b>	<b>108,645</b>	<b>97,524</b>	<b>100,000</b>
<b>Total Revenue</b>	<b>54,323</b>	<b>108,645</b>	<b>97,524</b>	<b>100,000</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Salaries</b>				
Admin Salaries - Regular	8,377	16,754	51,912	17,624
Compensated Absences	0	0	2,880	1,017
<b>Total Salaries</b>	<b>8,377</b>	<b>16,754</b>	<b>54,792</b>	<b>18,641</b>
<b>Office Expenses</b>				
Software	500	1,000	600	1,000
<b>Total Office Expenses</b>	<b>500</b>	<b>1,000</b>	<b>600</b>	<b>1,000</b>
<b>Management Fees</b>				
Management Fees	7,200	14,400	9,600	14,400
<b>Total Management Fees</b>	<b>7,200</b>	<b>14,400</b>	<b>9,600</b>	<b>14,400</b>
<b>Total Administrative Expenses</b>	<b>16,077</b>	<b>32,154</b>	<b>64,992</b>	<b>34,041</b>
<b>General Expenses</b>				
<b>Insurance</b>				
Workmen's Compensation	52	103	336	113
<b>Total Insurance</b>	<b>52</b>	<b>103</b>	<b>336</b>	<b>113</b>
<b>Employee Benefits Contribution</b>				
FICA Employers Share - Admin	632	1,264	3,972	1,348
Medical Benefits - Admin	1,639	3,279	9,708	3,875
Retirement Benefits - Admin	1,675	3,351	11,220	3,525
Fed & State Unemployment - Admin	0	0	0	12
Life Insurance - Admin	13	25	72	25
Disability Insurance - Admin	19	39	120	39
<b>Total Employee Benefits Contribution</b>	<b>3,979</b>	<b>7,958</b>	<b>25,092</b>	<b>8,824</b>
<b>Total General Expenses</b>	<b>4,030</b>	<b>8,061</b>	<b>25,428</b>	<b>8,937</b>
<b>Total Operating Expenses</b>	<b>20,107</b>	<b>40,215</b>	<b>90,420</b>	<b>42,978</b>
<b>NET OPERATING INCOME (LOSS)</b>	<b>34,215</b>	<b>68,430</b>	<b>7,104</b>	<b>57,022</b>
<b>Net Income (Loss)</b>	<b>34,215</b>	<b>68,430</b>	<b>7,104</b>	<b>57,022</b>

**AUSTIN PATHWAYS**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Operating Grants</b>				
HUD FSS Grant Revenue	300,524	601,049	674,244	891,306
Grants Revenue	76,922	153,845	814,092	895,273
FSS Recapture	7,226	14,452	6,000	0
<b>Total Operating Grants</b>	<b>384,673</b>	<b>769,346</b>	<b>1,494,336</b>	<b>1,786,579</b>
<b>Interest Income</b>				
Interest on Bank Accounts	12,379	24,758	20,004	0
<b>Total Interest Income</b>	<b>12,379</b>	<b>24,758</b>	<b>20,004</b>	<b>0</b>
<b>Other Revenue</b>				
Management Fee	8,131	16,262	0	0
Miscellaneous Income	71,962	143,924	52,008	80,000
Other Income - Misc	3,000	6,000	14,088	0
<b>Total Other Revenue</b>	<b>83,093</b>	<b>166,186</b>	<b>66,096</b>	<b>80,000</b>
<b>Total Revenue</b>	<b>480,145</b>	<b>960,290</b>	<b>1,580,436</b>	<b>1,866,579</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Salaries</b>				
Admin Salaries - Regular	187,903	375,807	389,148	502,442
Admin Salaries - Overtime	822	1,644	0	0
Incentive Pay	6,921	13,843	0	0
Compensated Absences	0	0	63,336	80,650
<b>Total Salaries</b>	<b>195,647</b>	<b>391,294</b>	<b>452,484</b>	<b>583,092</b>
<b>Travel &amp; Training</b>				
Staff Training	5,073	10,145	6,504	7,000
Travel - Airlines	0	0	7,956	4,000
Travel - Lodging	2,127	4,253	9,132	1,500
Travel - Car Transportation	747	1,493	504	0
Travel - Mileage	359	719	3,504	5,217
Per Diem	711	1,422	4,476	1,100
Travel - Conference Fees	850	1,700	5,304	2,200
<b>Total Travel &amp; Training</b>	<b>9,866</b>	<b>19,733</b>	<b>37,380</b>	<b>21,017</b>
<b>Auditing Fees</b>				
Auditing Fees	7,000	14,000	8,004	8,000
<b>Total Audit Fees</b>	<b>7,000</b>	<b>14,000</b>	<b>8,004</b>	<b>8,000</b>
<b>Office Expenses</b>				
Office Supplies	576	1,153	3,204	1,700
Postage, Couriers, Express Mail	992	1,984	5,100	1,100
Printing	0	0	1,596	750
Advertising and Marketing	0	0	3,000	1,750
Membership Dues and Fees	0	0	2,004	1,000
Telephone	3,641	7,282	8,448	6,000
Office Custodial	17	34	0	0
Computer Equipment	2,189	4,378	0	500
Equipment Leases	700	1,400	1,500	1,000
Office Equipment/Furniture	388	777	1,992	1,450
Admin Contractors	140,448	280,897	198,144	375,346
Meeting	8,190	16,380	31,500	13,500

**AUSTIN PATHWAYS**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Misc. Expenses	303	606	5,508	4,000
Subscriptions	265	531	1,500	1,500
Internship	301	603	0	5,000
Consultants	23,868	47,735	118,596	81,237
Interpreter Fee	1,020	2,040	3,948	1,750
Software	20,898	41,797	39,996	40,000
Sponsorships/Industry Contributions	1,500	3,000	5,004	1,500
Permits, Licenses & Certificates	3,595	7,190	504	2,000
<b>Total Office Expenses</b>	<b>208,893</b>	<b>417,785</b>	<b>431,544</b>	<b>541,083</b>
<b>Management Fees</b>				
Management Fees	11,732	23,464	5,820	0
<b>Total Management Fees</b>	<b>11,732</b>	<b>23,464</b>	<b>5,820</b>	<b>0</b>
<b>Total Administrative Expenses</b>	<b>433,138</b>	<b>866,276</b>	<b>935,232</b>	<b>1,153,192</b>
<b>Tenant Services</b>				
<b>Tenant Services- Salaries</b>				
Tenant Services - Salaries Reg	471,723	943,446	980,916	573,487
Tenant Services - Salaries OT	290	579	0	0
<b>Total Tenant Services - Salaries</b>	<b>472,012</b>	<b>944,025</b>	<b>980,916</b>	<b>573,487</b>
<b>Tenant Services - Youth Educational Success</b>				
A/B Honor Roll/Perfect Attendance	12,386	24,771	24,996	25,000
Collaborating with Priority One Schools	0	0	504	500
Comprehensive Youth Development Club	70,000	140,000	200,004	210,000
In School Case Management/Tutoring	254,167	508,333	600,000	650,000
Scholarship Marketing	5,978	11,957	8,760	8,000
School Supplies	10,616	21,232	9,996	10,000
Youth Leadership Lifeskills & Service	3,000	6,000	27,996	15,000
Youth Stem/Steam Programming	16,200	32,400	6,996	61,392
HACA Resident Scholarships	73,500	147,000	79,992	80,000
<b>Total Tenant Services - Youth Educational Success</b>	<b>445,847</b>	<b>891,693</b>	<b>959,244</b>	<b>1,059,892</b>
<b>Tenant Services - Workforce Development</b>				
Apprenticeship Stipends	18,346	36,692	108,888	10,000
Childcare Program - Voucher	367	734	5,004	5,000
Education and Training	701	1,402	30,000	5,000
Incentives	1,748	3,495	53,616	3,000
Parenting Classes	6,774	13,548	20,004	15,000
Transportation Assistance	0	0	2,004	1,000
Workforce Development Services	29,969	59,938	80,004	80,000
<b>Total Tenant Services - Workforce Development</b>	<b>57,905</b>	<b>115,809</b>	<b>299,520</b>	<b>119,000</b>
<b>Tenant Services - Community Initiatives</b>				
Community Grants/Donations	0	0	5,004	1,000
Citywide Advisory Board Support	800	1,600	3,996	4,000
Community Building	6,425	12,849	50,004	37,376
Community Educational Events	5,805	11,610	30,000	25,000
Elderly Supportive Services	134,314	268,628	224,004	245,000
New Resident Orientation Packets	0	0	996	301,000
Program Outreach & Marketing	0	0	3,996	1,000
Supportive Services	462	924	9,996	2,500
<b>Total Tenant Services - Community Initiatives</b>	<b>147,806</b>	<b>295,611</b>	<b>327,996</b>	<b>616,876</b>
<b>Tenant Services - Digital Inclusion</b>				

**AUSTIN PATHWAYS**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
ACC Tech Support Program	0	0	2,496	0
Computer Equipment	0	0	53,004	20,000
Adult Digital Literacy Training	0	0	261,516	5,000
<b>Total Tenant Services - Digital Inclusion</b>	<b>0</b>	<b>0</b>	<b>317,016</b>	<b>25,000</b>
<b>Tenant Services - FSS Support Services</b>				
Program Coordinating Committee & Partner Events	0	0	504	500
Bankquet/Recruitment and Marketing	471	942	5,004	9,000
FSS GED Incentives	1,399	2,797	24,996	3,000
FSS Support Services	43,813	87,627	20,004	31,000
<b>Total Tenant Services - FSS Support Services</b>	<b>45,683</b>	<b>91,366</b>	<b>50,508</b>	<b>43,500</b>
<b>Total Tenant Services</b>	<b>1,169,252</b>	<b>2,338,505</b>	<b>2,935,200</b>	<b>2,437,755</b>
<b>Ordinary Maintenance &amp; Operations</b>				
<b>Ordinary Maint. &amp; Operations- Materials</b>				
Materials - Gas & Oil	155	311	156	0
Materials - Auto Parts	0	0	300	0
<b>Total Materials</b>	<b>155</b>	<b>311</b>	<b>456</b>	<b>0</b>
<b>Contracts - Maintenance</b>				
Contract - Vehicle Repairs/ Maintenance	1,934	3,867	996	1,000
<b>Total Maintenance Contracts</b>	<b>1,934</b>	<b>3,867</b>	<b>996</b>	<b>1,000</b>
<b>Total Ordinary Maintenance &amp; Operations</b>	<b>2,089</b>	<b>4,178</b>	<b>1,452</b>	<b>1,000</b>
<b>Protective Services</b>				
Crime Prevention/Safety	400	800	0	0
Protective Services- Equipments	0	0	504	0
<b>Total Protective Services</b>	<b>400</b>	<b>800</b>	<b>504</b>	<b>0</b>
<b>General Expenses</b>				
<b>Insurance</b>				
Workmen's Compensation	4,111	8,223	7,740	9,347
<b>Total Insurance</b>	<b>4,111</b>	<b>8,223</b>	<b>7,740</b>	<b>9,347</b>
<b>Employee Benefits Contribution</b>				
FICA Employers Share - Admin	7,358	14,716	30,096	52,645
FICA Employers Share - Tenant Serv	40,697	81,394	75,036	54,722
Medical Benefits - Admin	21,439	42,878	97,140	210,445
Medical Benefits - Tenant Serv	138,511	277,021	280,116	189,115
Retirement Benefits - Admin	7,307	14,615	43,680	99,936
Retirement Benefits - Tenant Serv	68,873	137,747	125,172	66,761
Fed & State Unemployment - Admin	204	408	456	1,080
Fed & State Unemployment - Tenant Serv	58	116	1,440	810
Life Insurance - Admin	141	283	504	1,190
Life Insurance - Tenant Serv	721	1,442	1,032	719
Disability Insurance - Admin	251	502	840	1,928
Disability Insurance - Tenant Serv	1,220	2,440	2,004	1,141
<b>Total Employee Benefits Contribution</b>	<b>286,781</b>	<b>573,561</b>	<b>657,516</b>	<b>680,492</b>
<b>Total General Expenses</b>	<b>290,892</b>	<b>581,784</b>	<b>665,256</b>	<b>689,839</b>
<b>Total Operating Expenses</b>	<b>1,895,771</b>	<b>3,791,543</b>	<b>4,537,644</b>	<b>4,281,786</b>
<b>NET OPERATING INCOME (LOSS)</b>	<b>(1,415,627)</b>	<b>(2,831,253)</b>	<b>(2,957,208)</b>	<b>(2,415,207)</b>
<b>Net Income (Loss)</b>	<b>(1,415,627)</b>	<b>(2,831,253)</b>	<b>(2,957,208)</b>	<b>(2,415,207)</b>

**AAHC BRIDGE AT BENT TREE**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Tenant Revenue</b>				
Rental Charges	714,127	1,428,253	1,552,716	1,569,721
Write-Off / Bad Debt	(13,374)	(26,748)	(4,800)	(20,100)
<b>Total Tenant Revenue</b>	<b>700,753</b>	<b>1,401,505</b>	<b>1,547,916</b>	<b>1,549,621</b>
<b>Other Revenue</b>				
Other Income - Misc	156,403	312,805	208,860	230,250
<b>Total Other Revenue</b>	<b>156,403</b>	<b>312,805</b>	<b>208,860</b>	<b>230,250</b>
<b>Total Revenue</b>	<b>857,155</b>	<b>1,714,311</b>	<b>1,756,776</b>	<b>1,779,871</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Salaries</b>				
Property Mgmt. - Payroll	74,516	149,032	169,236	148,389
<b>Total Salaries</b>	<b>74,516</b>	<b>149,032</b>	<b>169,236</b>	<b>148,389</b>
<b>Office Expenses</b>				
Misc. Expenses	22,546	45,092	1,848	0
Prop. Mgmt. - Admin Costs	56,767	113,534	168,720	116,574
Prop. Mgmt. - Advertising and Promotions	13,942	27,885	64,068	23,300
<b>Total Office Expenses</b>	<b>93,255</b>	<b>186,511</b>	<b>234,636</b>	<b>139,874</b>
<b>Management Fees</b>				
Prop. Mgmt. - Management Fees	38,541	77,083	79,608	81,216
<b>Total Management Fees</b>	<b>38,541</b>	<b>77,083</b>	<b>79,608</b>	<b>81,216</b>
<b>Total Administrative Expenses</b>	<b>206,313</b>	<b>412,626</b>	<b>483,480</b>	<b>369,479</b>
<b>Utilities</b>				
Water	50,293	100,586	89,700	103,800
Electricity	12,094	24,188	25,320	21,900
<b>Total Utilities</b>	<b>62,387</b>	<b>124,774</b>	<b>115,020</b>	<b>125,700</b>
<b>Ordinary Maintenance &amp; Operations</b>				
<b>Maintenance Labor</b>				
Prop. Mgmt. Maintenance Labor	66,909	133,817	130,188	138,965
<b>Total Maintenance Labor</b>	<b>66,909</b>	<b>133,817</b>	<b>130,188</b>	<b>138,965</b>
<b>Contracts - Maintenance</b>				
Prop Mgmt. Cleaning & Decorating	78,943	157,886	70,500	159,000
Prop. Mgmt. Maintenance & Repair	69,893	139,787	82,188	136,440
Prop. Mgmt. Contract Services	40,510	81,020	74,676	76,812
<b>Total Maintenance Contracts</b>	<b>189,347</b>	<b>378,693</b>	<b>227,364</b>	<b>372,252</b>
<b>Total Ordinary Maintenance &amp; Operations</b>	<b>256,255</b>	<b>512,510</b>	<b>357,552</b>	<b>511,217</b>
<b>Protective Services</b>				
Protective Services- Equipments	333	666	672	720
<b>Total Protective Services</b>	<b>333</b>	<b>666</b>	<b>672</b>	<b>720</b>
<b>General Expenses</b>				
<b>Insurance</b>				
Prop. Mgmt. - Insurance	65,695	131,390	144,120	151,840
<b>Total Insurance</b>	<b>65,695</b>	<b>131,390</b>	<b>144,120</b>	<b>151,840</b>

**AAHC BRIDGE AT BENT TREE  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>Employee Benefits Contribution</b>				
Prop. Mgmt. Payroll Admin Benefits - Admin	10,535	21,071	18,732	36,885
Prop. Mgmt. Payroll Maint. Benefits - Maintenance	12,288	24,576	23,532	36,884
<b>Total Employee Benefits Contribution</b>	<b>22,823</b>	<b>45,647</b>	<b>42,264</b>	<b>73,769</b>
<b>Interest Expense</b>				
Interest on Notes Payable	75,867	151,734	149,712	147,204
<b>Total Interest Expense</b>	<b>75,867</b>	<b>151,734</b>	<b>149,712</b>	<b>147,204</b>
<b>Total General Expenses</b>	<b>164,386</b>	<b>328,771</b>	<b>336,096</b>	<b>372,813</b>
<b>Total Operating Expenses</b>	<b>689,674</b>	<b>1,379,349</b>	<b>1,292,820</b>	<b>1,379,929</b>
<b>NET OPERATING INCOME (LOSS)</b>	<b>167,481</b>	<b>334,962</b>	<b>463,956</b>	<b>399,942</b>
<b>Non-Routine Expenses</b>				
Casualty Losses- Non-capitalized	6,224	12,449	0	0
<b>Total Non-Routine Expenses</b>	<b>6,224</b>	<b>12,449</b>	<b>0</b>	<b>0</b>
<b>Net Income (Loss)</b>	<b>161,257</b>	<b>322,514</b>	<b>463,956</b>	<b>399,942</b>

**AAHC BRIDGES AT SOUTH POINT**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Tenant Revenue</b>				
Rental Charges	878,059	1,756,118	2,047,884	1,894,069
Write-Off / Bad Debt	(52,487)	(104,975)	(36,000)	(78,000)
<b>Total Tenant Revenue</b>	<b>825,571</b>	<b>1,651,143</b>	<b>2,011,884</b>	<b>1,816,069</b>
<b>Other Revenue</b>				
Other Income - Misc	232,832	465,664	221,424	279,960
<b>Total Other Revenue</b>	<b>232,832</b>	<b>465,664</b>	<b>221,424</b>	<b>279,960</b>
<b>Total Revenue</b>	<b>1,058,403</b>	<b>2,116,807</b>	<b>2,233,308</b>	<b>2,096,029</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Salaries</b>				
Property Mgmt. - Payroll	71,913	143,826	144,936	157,369
<b>Total Salaries</b>	<b>71,913</b>	<b>143,826</b>	<b>144,936</b>	<b>157,369</b>
<b>Office Expenses</b>				
Misc. Expenses	7,033	14,066	0	0
Prop. Mgmt. - Admin Costs	82,926	165,852	174,576	174,815
Prop. Mgmt. - Advertising and Promotions	42,039	84,078	64,632	103,120
<b>Total Office Expenses</b>	<b>131,998</b>	<b>263,997</b>	<b>239,208</b>	<b>277,935</b>
<b>Management Fees</b>				
Prop. Mgmt. - Management Fees	31,459	62,919	68,076	86,961
<b>Total Management Fees</b>	<b>31,459</b>	<b>62,919</b>	<b>68,076</b>	<b>86,961</b>
<b>Total Administrative Expenses</b>	<b>235,371</b>	<b>470,742</b>	<b>452,220</b>	<b>522,265</b>
<b>Utilities</b>				
Water	47,575	95,149	118,320	108,000
Electricity	10,509	21,018	21,360	23,800
Gas	6,468	12,936	15,720	21,000
<b>Total Utilities</b>	<b>64,552</b>	<b>129,104</b>	<b>155,400</b>	<b>152,800</b>
<b>Ordinary Maintenance &amp; Operations</b>				
<b>Maintenance Labor</b>				
Prop. Mgmt. Maintenance Labor	71,076	142,152	156,396	160,778
<b>Total Maintenance Labor</b>	<b>71,076</b>	<b>142,152</b>	<b>156,396</b>	<b>160,778</b>
<b>Contracts - Maintenance</b>				
Prop Mgmt. Cleaning & Decorating	58,730	117,460	109,884	105,180
Prop. Mgmt. Maintenance & Repair	44,391	88,782	130,920	142,882
Prop. Mgmt Contract Services	44,122	88,244	80,592	84,840
<b>Total Maintenance Contracts</b>	<b>147,243</b>	<b>294,486</b>	<b>321,396</b>	<b>332,902</b>
<b>Total Ordinary Maintenance &amp; Operations</b>	<b>218,319</b>	<b>436,638</b>	<b>477,792</b>	<b>493,680</b>

**AAHC BRIDGES AT SOUTH POINT  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>Protective Services</b>				
Prop Mgmt - Security Contracts/Services	8,462	16,924	13,332	14,112
<b>Total Protective Services</b>	<b>8,462</b>	<b>16,924</b>	<b>13,332</b>	<b>14,112</b>
<b>General Expenses</b>				
<b>Insurance</b>				
Prop. Mgmt. - Insurance	77,385	154,770	169,956	149,953
<b>Total Insurance</b>	<b>77,385</b>	<b>154,770</b>	<b>169,956</b>	<b>149,953</b>
<b>Employee Benefits Contribution</b>				
Prop. Mgmt. Payroll Admin Benefits - Admin	8,658	17,317	20,676	19,392
Prop. Mgmt. Payroll Maint. Benefits - Maintenance	7,568	15,136	24,696	19,393
<b>Total Employee Benefits Contribution</b>	<b>16,226</b>	<b>32,453</b>	<b>45,372</b>	<b>38,785</b>
<b>Interest Expense</b>				
Interest on Notes Payable	239,775	479,549	475,368	473,314
<b>Total Interest Expense</b>	<b>239,775</b>	<b>479,549</b>	<b>475,368</b>	<b>473,314</b>
<b>Total General Expenses</b>	<b>333,386</b>	<b>666,772</b>	<b>690,696</b>	<b>662,052</b>
<b>Total Operating Expenses</b>	<b>860,089</b>	<b>1,720,179</b>	<b>1,789,440</b>	<b>1,844,909</b>
<b>NET OPERATING INCOME (LOSS)</b>	<b>198,314</b>	<b>396,628</b>	<b>443,868</b>	<b>251,120</b>
<b>Non-Routine Expenses</b>				
Casualty Losses- Non-capitalized	585,722	1,171,444	0	63,700
<b>Total Non-Routine Expenses</b>	<b>585,722</b>	<b>1,171,444</b>	<b>0</b>	<b>63,700</b>
<b>Net Income (Loss)</b>	<b>(387,408)</b>	<b>(774,816)</b>	<b>443,868</b>	<b>187,420</b>

**AAHC EASTLAND PLAZA  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Tenant Revenue</b>				
Non-Dwelling Rental	476,845	953,691	922,416	917,820
<b>Total Tenant Revenue</b>	<b>476,845</b>	<b>953,691</b>	<b>922,416</b>	<b>917,820</b>
<b>Other Revenue</b>				
Other Income - Misc	94,935	189,869	256,272	299,196
<b>Total Other Revenue</b>	<b>94,935</b>	<b>189,869</b>	<b>256,272</b>	<b>299,196</b>
<b>Total Revenue</b>	<b>571,780</b>	<b>1,143,560</b>	<b>1,178,688</b>	<b>1,217,016</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Office Expenses</b>				
Misc. Expenses	0	0	0	0
Prop. Mgmt. - Admin Costs	332	663	6,408	2,890
Prop. Mgmt. - Advertising and Promotions	0	0	180	0
<b>Total Office Expenses</b>	<b>332</b>	<b>663</b>	<b>6,588</b>	<b>2,890</b>
<b>Management Fees</b>				
Prop. Mgmt. - Management Fees	27,000	54,000	54,000	54,000
Asset Management Fees	680,566	1,361,132	0	0
<b>Total Management Fees</b>	<b>707,566</b>	<b>1,415,132</b>	<b>54,000</b>	<b>54,000</b>
<b>Total Administrative Expenses</b>	<b>707,898</b>	<b>1,415,795</b>	<b>60,588</b>	<b>56,890</b>
<b>Utilities</b>				
Water	45,209	90,419	61,200	86,880
Electricity	5,465	10,930	11,040	11,280
<b>Total Utilities</b>	<b>50,674</b>	<b>101,348</b>	<b>72,240</b>	<b>98,160</b>
<b>Ordinary Maintenance &amp; Operations</b>				
<b>Maintenance Labor</b>				
Prop. Mgmt. Maintenance Labor	13,009	26,018	23,004	28,519
<b>Total Maintenance Labor</b>	<b>13,009</b>	<b>26,018</b>	<b>23,004</b>	<b>28,519</b>
<b>Contracts - Maintenance</b>				
Prop Mgmt. Cleaning & Decorating	23,062	46,124	44,880	44,020
Prop. Mgmt. Maintenance & Repair	26,931	53,862	29,700	42,914
Prop. Mgmt Contract Services	14,452	28,904	20,340	26,900
<b>Total Maintenance Contracts</b>	<b>64,445</b>	<b>128,890</b>	<b>94,920</b>	<b>113,834</b>
<b>Total Ordinary Maintenance &amp; Operations</b>	<b>77,454</b>	<b>154,908</b>	<b>117,924</b>	<b>142,353</b>
<b>Protective Services</b>				
Prop Mgmt - Security Contracts/Services	55,440	110,881	111,024	110,865
<b>Total Protective Services</b>	<b>55,440</b>	<b>110,881</b>	<b>111,024</b>	<b>110,865</b>
<b>General Expenses</b>				
<b>Insurance</b>				
Property Insurance	50,369	100,738	0	0
Prop. Mgmt. - Insurance	0	0	104,160	91,075
<b>Total Insurance</b>	<b>50,369</b>	<b>100,738</b>	<b>104,160</b>	<b>91,075</b>

**AAHC EASTLAND PLAZA  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>Employee Benefits Contribution</b>				
Prop. Mgmt. Payroll Maint. Benefits - Maintenance	5,461	10,921	11,196	12,024
<b>Total Employee Benefits Contribution</b>	<b>5,461</b>	<b>10,921</b>	<b>11,196</b>	<b>12,024</b>
<b>Other General Expense</b>				
PILOT	0	0	88,104	88,104
<b>Total Other General Expenses</b>	<b>0</b>	<b>0</b>	<b>88,104</b>	<b>88,104</b>
<b>Total General Expenses</b>	<b>55,830</b>	<b>111,659</b>	<b>203,460</b>	<b>191,203</b>
<b>Total Operating Expenses</b>	<b>947,296</b>	<b>1,894,592</b>	<b>565,236</b>	<b>599,471</b>
<b>NET OPERATING INCOME (LOSS)</b>	<b>(375,516)</b>	<b>(751,032)</b>	<b>613,452</b>	<b>617,545</b>
<b>Non-Routine Expenses</b>				
Casualty Losses- Non-capitalized	695,490	1,390,981	0	0
<b>Total Non-Routine Expenses</b>	<b>695,490</b>	<b>1,390,981</b>	<b>0</b>	<b>0</b>
<b>Net Income (Loss)</b>	<b>(1,071,006)</b>	<b>(2,142,012)</b>	<b>613,452</b>	<b>617,545</b>

**AAHC BRIDGE AT LEXINGTON HILLS  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Tenant Revenue</b>				
Rental Charges	1,403,075	2,806,151	2,936,808	2,947,590
Write-Off / Bad Debt	(25,934)	(51,868)	(49,500)	(51,600)
<b>Total Tenant Revenue</b>	<b>1,377,141</b>	<b>2,754,283</b>	<b>2,887,308</b>	<b>2,895,990</b>
<b>Other Revenue</b>				
Prior Period Adjustment	13,103	26,206	0	0
Other Income - Misc	275,249	550,497	432,732	451,048
<b>Total Other Revenue</b>	<b>288,352</b>	<b>576,703</b>	<b>432,732</b>	<b>451,048</b>
<b>Total Revenue</b>	<b>1,665,493</b>	<b>3,330,986</b>	<b>3,320,040</b>	<b>3,347,038</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Salaries</b>				
Property Mgmt. - Payroll	105,598	211,197	210,252	210,256
<b>Total Salaries</b>	<b>105,598</b>	<b>211,197</b>	<b>210,252</b>	<b>210,256</b>
<b>Office Expenses</b>				
Misc. Expenses	799	1,599	0	0
Prop. Mgmt. - Admin Costs	101,879	203,759	237,792	214,747
Prop. Mgmt. - Advertising and Promotions	46,419	92,838	55,128	77,220
<b>Total Office Expenses</b>	<b>149,098</b>	<b>298,196</b>	<b>292,920</b>	<b>291,967</b>
<b>Management Fees</b>				
Prop. Mgmt. - Management Fees	73,768	147,535	151,632	152,939
Asset Management Fees	512,578	1,025,156	0	1,025,156
<b>Total Management Fees</b>	<b>586,346</b>	<b>1,172,691</b>	<b>151,632</b>	<b>1,178,095</b>
<b>Total Administrative Expenses</b>	<b>841,042</b>	<b>1,682,084</b>	<b>654,804</b>	<b>1,680,318</b>
<b>Utilities</b>				
Water	63,864	127,727	157,200	144,000
Electricity	14,638	29,276	29,220	35,220
Gas	11,948	23,896	30,300	31,800
<b>Total Utilities</b>	<b>90,449</b>	<b>180,899</b>	<b>216,720</b>	<b>211,020</b>
<b>Ordinary Maintenance &amp; Operations</b>				
<b>Maintenance Labor</b>				
Prop. Mgmt. Maintenance Labor	141,372	282,743	206,736	194,741
<b>Total Maintenance Labor</b>	<b>141,372</b>	<b>282,743</b>	<b>206,736</b>	<b>194,741</b>
<b>Contracts - Maintenance</b>				
Prop Mgmt. Cleaning & Decorating	88,969	177,938	141,600	195,540
Prop. Mgmt. Maintenance & Repair	87,460	174,920	174,276	161,898
Prop. Mgmt Contract Services	61,442	122,884	121,584	145,072
<b>Total Maintenance Contracts</b>	<b>237,871</b>	<b>475,741</b>	<b>437,460</b>	<b>502,510</b>
<b>Total Ordinary Maintenance &amp; Operations</b>	<b>379,242</b>	<b>758,484</b>	<b>644,196</b>	<b>697,251</b>
<b>Protective Services</b>				
Prop Mgmt - Security Contracts/Services	6,355	12,711	12,600	12,600
<b>Total Protective Services</b>	<b>6,355</b>	<b>12,711</b>	<b>12,600</b>	<b>12,600</b>
<b>General Expenses</b>				

**AAHC BRIDGE AT LEXINGTON HILLS  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>Insurance</b>				
Prop. Mgmt. - Insurance	76,980	153,959	163,944	163,948
<b>Total Insurance</b>	<b>76,980</b>	<b>153,959</b>	<b>163,944</b>	<b>163,948</b>
<b>Employee Benefits Contribution</b>				
Prop. Mgmt. Payroll Admin Benefits - Admin	8,181	16,362	30,972	30,970
Prop. Mgmt. Payroll Maint. Benefits - Maintenance	14,269	28,539	36,012	30,971
<b>Total Employee Benefits Contribution</b>	<b>22,451</b>	<b>44,901</b>	<b>66,984</b>	<b>61,941</b>
<b>Interest Expense</b>				
Interest on Notes Payable	222,427	444,855	442,644	442,639
<b>Total Interest Expense</b>	<b>222,427</b>	<b>444,855</b>	<b>442,644</b>	<b>442,639</b>
<b>Total General Expenses</b>	<b>321,857</b>	<b>643,715</b>	<b>673,572</b>	<b>668,528</b>
<b>Total Operating Expenses</b>	<b>1,638,946</b>	<b>3,277,892</b>	<b>2,201,892</b>	<b>3,269,717</b>
<b>NET OPERATING INCOME (LOSS)</b>	<b>26,547</b>	<b>53,093</b>	<b>1,118,148</b>	<b>77,321</b>
<b>Net Income (Loss)</b>	<b>26,547</b>	<b>53,093</b>	<b>1,118,148</b>	<b>77,321</b>

**LEISURE TIME VILLAGE**  
**FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Tenant Revenue</b>				
Rental Charges	87,025	174,050	184,200	186,300
<b>Total Tenant Revenue</b>	<b>87,025</b>	<b>174,050</b>	<b>184,200</b>	<b>186,300</b>
<b>Other Revenue</b>				
Other Income - Misc	454	907	1,020	1,164
<b>Total Other Revenue</b>	<b>454</b>	<b>907</b>	<b>1,020</b>	<b>1,164</b>
<b>Total Revenue</b>	<b>87,479</b>	<b>174,957</b>	<b>185,220</b>	<b>187,464</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Salaries</b>				
Property Mgmt. - Payroll	0	0	2,124	0
<b>Total Salaries</b>	<b>0</b>	<b>0</b>	<b>2,124</b>	<b>0</b>
<b>Office Expenses</b>				
Misc. Expenses	0	0	276	0
Prop. Mgmt. - Admin Costs	17,525	35,050	34,680	34,278
Prop. Mgmt. - Advertising and Promotions	33	66	360	120
<b>Total Office Expenses</b>	<b>17,558</b>	<b>35,116</b>	<b>35,316</b>	<b>34,398</b>
<b>Management Fees</b>				
Prop. Mgmt. - Management Fees	7,500	15,000	15,000	15,000
Asset Management Fees	149,192	298,384	0	0
<b>Total Management Fees</b>	<b>156,692</b>	<b>313,384</b>	<b>15,000</b>	<b>15,000</b>
<b>Total Administrative Expenses</b>	<b>174,250</b>	<b>348,500</b>	<b>52,440</b>	<b>49,398</b>
<b>Utilities</b>				
Electricity	632	1,263	0	600
<b>Total Utilities</b>	<b>632</b>	<b>1,263</b>	<b>0</b>	<b>600</b>
<b>Ordinary Maintenance &amp; Operations</b>				
<b>Maintenance Labor</b>				
Prop. Mgmt. Maintenance Labor	12,664	25,328	22,644	26,467
<b>Total Maintenance Labor</b>	<b>12,664</b>	<b>25,328</b>	<b>22,644</b>	<b>26,467</b>
<b>Contracts - Maintenance</b>				
Prop Mgmt. Cleaning & Decorating	5,741	11,483	5,412	4,770
Prop. Mgmt. Maintenance & Repair	11,958	23,917	20,172	20,520
Prop. Mgmt Contract Services	3,160	6,320	11,400	7,800
<b>Total Maintenance Contracts</b>	<b>20,860</b>	<b>41,720</b>	<b>36,984</b>	<b>33,090</b>
<b>Total Ordinary Maintenance &amp; Operations</b>	<b>33,524</b>	<b>67,048</b>	<b>59,628</b>	<b>59,557</b>
<b>Protective Services</b>				
Prop Mgmt - Security Contracts/Services	3,466	6,931	7,200	7,539
<b>Total Protective Services</b>	<b>3,466</b>	<b>6,931</b>	<b>7,200</b>	<b>7,539</b>
<b>General Expenses</b>				
<b>Insurance</b>				
Prop. Mgmt. - Insurance	8,379	16,758	19,944	19,746
<b>Total Insurance</b>	<b>8,379</b>	<b>16,758</b>	<b>19,944</b>	<b>19,746</b>

**LEISURE TIME VILLAGE  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
Total General Expenses	8,379	16,758	19,944	19,746
Total Operating Expenses	220,250	440,500	139,212	136,840
<b>NET OPERATING INCOME (LOSS)</b>	<b>(132,771)</b>	<b>(265,543)</b>	<b>46,008</b>	<b>50,624</b>
<b>Net Income (Loss)</b>	<b>(132,771)</b>	<b>(265,543)</b>	<b>46,008</b>	<b>50,624</b>

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Tenant Revenue</b>				
Rental Charges	130,072	260,145	267,576	266,412
<b>Total Tenant Revenue</b>	<b>130,072</b>	<b>260,145</b>	<b>267,576</b>	<b>266,412</b>
<b>Other Revenue</b>				
Other Income - Misc	921	1,843	1,380	1,440
<b>Total Other Revenue</b>	<b>921</b>	<b>1,843</b>	<b>1,380</b>	<b>1,440</b>
<b>Total Revenue</b>	<b>130,994</b>	<b>261,988</b>	<b>268,956</b>	<b>267,852</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Office Expenses</b>				
Prop. Mgmt. - Admin Costs	1,371	2,742	5,124	2,835
Prop. Mgmt. - Advertising and Promotions	0	0	240	0
<b>Total Office Expenses</b>	<b>1,371</b>	<b>2,742</b>	<b>5,364</b>	<b>2,835</b>
<b>Management Fees</b>				
Prop. Mgmt. - Management Fees	7,500	15,000	15,000	15,000
Asset Management Fees	192,855	385,710	0	0
<b>Total Management Fees</b>	<b>200,355</b>	<b>400,710</b>	<b>15,000</b>	<b>15,000</b>
<b>Total Administrative Expenses</b>	<b>201,726</b>	<b>403,452</b>	<b>20,364</b>	<b>17,835</b>
<b>Ordinary Maintenance &amp; Operations</b>				
<b>Maintenance Labor</b>				
Prop. Mgmt. Maintenance Labor	12,592	25,185	22,620	26,725
<b>Total Maintenance Labor</b>	<b>12,592</b>	<b>25,185</b>	<b>22,620</b>	<b>26,725</b>
<b>Contracts - Maintenance</b>				
Prop Mgmt. Cleaning & Decorating	3,136	6,272	2,316	14,052
Prop. Mgmt. Maintenance & Repair	40,560	81,120	68,400	58,693
Prop. Mgmt Contract Services	3,074	6,148	8,700	6,300
<b>Total Maintenance Contracts</b>	<b>46,770</b>	<b>93,540</b>	<b>79,416</b>	<b>79,045</b>
<b>Total Ordinary Maintenance &amp; Operations</b>	<b>59,362</b>	<b>118,725</b>	<b>102,036</b>	<b>105,770</b>
<b>Total Operating Expenses</b>	<b>261,088</b>	<b>522,177</b>	<b>122,400</b>	<b>123,605</b>
<b>NET OPERATING INCOME (LOSS)</b>	<b>(130,094)</b>	<b>(260,189)</b>	<b>146,556</b>	<b>144,247</b>
<b>Net Income (Loss)</b>	<b>(130,094)</b>	<b>(260,189)</b>	<b>146,556</b>	<b>144,247</b>

**AAHC BRIDGE AT STERLING VILLAGE  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Tenant Revenue</b>				
Rental Charges	1,138,256	2,276,511	2,492,628	2,326,614
Write-Off / Bad Debt	(12,736)	(25,472)	(17,040)	(23,100)
<b>Total Tenant Revenue</b>	<b>1,125,520</b>	<b>2,251,040</b>	<b>2,475,588</b>	<b>2,303,514</b>
<b>Other Revenue</b>				
Prior Period Adjustment	(435)	(869)	0	0
Other Income - Misc	224,212	448,424	354,432	427,176
<b>Total Other Revenue</b>	<b>223,778</b>	<b>447,555</b>	<b>354,432</b>	<b>427,176</b>
<b>Total Revenue</b>	<b>1,349,297</b>	<b>2,698,595</b>	<b>2,830,020</b>	<b>2,730,690</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Salaries</b>				
Property Mgmt. - Payroll	106,598	213,196	203,736	207,242
<b>Total Salaries</b>	<b>106,598</b>	<b>213,196</b>	<b>203,736</b>	<b>207,242</b>
<b>Office Expenses</b>				
Misc. Expenses	3,020	6,039	0	0
Prop. Mgmt. - Admin Costs	90,214	180,427	166,104	184,423
Prop. Mgmt. - Advertising and Promotions	21,622	43,244	29,196	46,010
<b>Total Office Expenses</b>	<b>114,855</b>	<b>229,711</b>	<b>195,300</b>	<b>230,433</b>
<b>Management Fees</b>				
Prop. Mgmt. - Management Fees	60,609	121,218	249,744	124,398
Asset Management Fees	547,042	1,094,084	0	0
<b>Total Management Fees</b>	<b>607,651</b>	<b>1,215,302</b>	<b>249,744</b>	<b>124,398</b>
<b>Total Administrative Expenses</b>	<b>829,104</b>	<b>1,658,209</b>	<b>648,780</b>	<b>562,073</b>
<b>Utilities</b>				
Water	105,683	211,365	192,000	223,200
Electricity	12,066	24,131	21,600	24,960
Gas	463	926	1,080	1,020
<b>Total Utilities</b>	<b>118,211</b>	<b>236,423</b>	<b>214,680</b>	<b>249,180</b>
<b>Ordinary Maintenance &amp; Operations</b>				
<b>Maintenance Labor</b>				
Prop. Mgmt. Maintenance Labor	93,568	187,136	176,772	195,954
<b>Total Maintenance Labor</b>	<b>93,568</b>	<b>187,136</b>	<b>176,772</b>	<b>195,954</b>
<b>Contracts - Maintenance</b>				
Prop Mgmt. Cleaning & Decorating	49,865	99,731	103,020	105,540
Prop. Mgmt. Maintenance & Repair	62,113	124,226	104,172	124,128
Prop. Mgmt Contract Services	50,170	100,340	93,516	99,140
<b>Total Maintenance Contracts</b>	<b>162,149</b>	<b>324,297</b>	<b>300,708</b>	<b>328,808</b>
<b>Total Ordinary Maintenance &amp; Operations</b>	<b>255,716</b>	<b>511,433</b>	<b>477,480</b>	<b>524,762</b>
<b>Protective Services</b>				
Prop Mgmt - Security Contracts/Services	12,310	24,620	50,280	25,456
<b>Total Protective Services</b>	<b>12,310</b>	<b>24,620</b>	<b>50,280</b>	<b>25,456</b>

**AAHC BRIDGE AT STERLING VILLAGE  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>General Expenses</b>				
<b>Insurance</b>				
Prop. Mgmt. - Insurance	87,235	174,470	203,928	193,163
<b>Total Insurance</b>	<b>87,235</b>	<b>174,470</b>	<b>203,928</b>	<b>193,163</b>
<b>Employee Benefits Contribution</b>				
Prop. Mgmt. Payroll Admin Benefits - Admin	14,966	29,932	29,256	29,239
Prop. Mgmt. Payroll Maint. Benefits - Maintenance	15,718	31,437	36,576	29,239
<b>Total Employee Benefits Contribution</b>	<b>30,684</b>	<b>61,368</b>	<b>65,832</b>	<b>58,478</b>
<b>Interest Expense</b>				
Interest on Notes Payable	92,688	185,376	182,616	179,072
<b>Total Interest Expense</b>	<b>92,688</b>	<b>185,376</b>	<b>182,616</b>	<b>179,072</b>
<b>Total General Expenses</b>	<b>210,607</b>	<b>421,214</b>	<b>452,376</b>	<b>430,713</b>
<b>Total Operating Expenses</b>	<b>1,425,950</b>	<b>2,851,899</b>	<b>1,843,596</b>	<b>1,792,184</b>
<b>NET OPERATING INCOME (LOSS)</b>	<b>(76,652)</b>	<b>(153,305)</b>	<b>986,424</b>	<b>938,506</b>
<b>Net Income (Loss)</b>	<b>(76,652)</b>	<b>(153,305)</b>	<b>986,424</b>	<b>938,506</b>

**AAHC BRIDGE AT SWEETWATER  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>REVENUES</b>				
<b>Tenant Revenue</b>				
Rental Charges	810,700	1,621,401	1,718,628	1,672,683
Write-Off / Bad Debt	(12,151)	(24,303)	(3,264)	(20,640)
<b>Total Tenant Revenue</b>	<b>798,549</b>	<b>1,597,098</b>	<b>1,715,364</b>	<b>1,652,043</b>
<b>Other Revenue</b>				
Prior Period Adjustment	283	566	0	0
Other Income - Misc	120,612	241,224	188,520	235,169
<b>Total Other Revenue</b>	<b>120,895</b>	<b>241,790</b>	<b>188,520</b>	<b>235,169</b>
<b>Total Revenue</b>	<b>919,444</b>	<b>1,838,888</b>	<b>1,903,884</b>	<b>1,887,212</b>
<b>EXPENSES</b>				
<b>Administrative Expenses</b>				
<b>Salaries</b>				
Property Mgmt. - Payroll	78,824	157,649	169,788	159,184
<b>Total Salaries</b>	<b>78,824</b>	<b>157,649</b>	<b>169,788</b>	<b>159,184</b>
<b>Office Expenses</b>				
Misc. Expenses	4,000	8,000	0	0
Prop. Mgmt. - Admin Costs	62,674	125,347	179,052	132,531
Prop. Mgmt. - Advertising and Promotions	12,811	25,622	47,436	24,545
<b>Total Office Expenses</b>	<b>79,485</b>	<b>158,969</b>	<b>226,488</b>	<b>157,076</b>
<b>Management Fees</b>				
Prop. Mgmt. - Management Fees	41,111	82,222	86,064	86,123
Asset Management Fees	242,171	484,342	0	0
<b>Total Management Fees</b>	<b>283,282</b>	<b>566,564</b>	<b>86,064</b>	<b>86,123</b>
<b>Total Administrative Expenses</b>	<b>441,591</b>	<b>883,182</b>	<b>482,340</b>	<b>402,383</b>
<b>Utilities</b>				
Water	41,672	83,344	91,200	78,300
Electricity	7,275	14,549	13,872	15,960
Gas	11,061	22,123	21,000	22,800
<b>Total Utilities</b>	<b>60,008</b>	<b>120,016</b>	<b>126,072</b>	<b>117,060</b>
<b>Ordinary Maintenance &amp; Operations</b>				
<b>Maintenance Labor</b>				
Prop. Mgmt. Maintenance Labor	84,319	168,637	191,532	149,505
<b>Total Maintenance Labor</b>	<b>84,319</b>	<b>168,637</b>	<b>191,532</b>	<b>149,505</b>
<b>Contracts - Maintenance</b>				
Prop Mgmt. Cleaning & Decorating	56,362	112,724	107,436	107,280
Prop. Mgmt. Maintenance & Repair	76,662	153,323	151,320	163,994
Prop. Mgmt Contract Services	40,043	80,086	78,840	85,716
<b>Total Maintenance Contracts</b>	<b>173,066</b>	<b>346,133</b>	<b>337,596</b>	<b>356,990</b>
<b>Total Ordinary Maintenance &amp; Operations</b>	<b>257,385</b>	<b>514,770</b>	<b>529,128</b>	<b>506,495</b>
<b>Protective Services</b>				
Prop Mgmt - Security Contracts/Services	5,521	11,043	10,740	10,507
<b>Total Protective Services</b>	<b>5,521</b>	<b>11,043</b>	<b>10,740</b>	<b>10,507</b>

**AAHC BRIDGE AT SWEETWATER  
FISCAL YEAR 2027 OPERATING BUDGET**

	FISCAL YEAR 2026			FY 2027
	PTD Actual	Annualized PTD	Approved Budget	Requested Budget
<b>General Expenses</b>				
<b>Insurance</b>				
Prop. Mgmt. - Insurance	69,681	139,362	143,892	161,654
<b>Total Insurance</b>	<b>69,681</b>	<b>139,362</b>	<b>143,892</b>	<b>161,654</b>
<b>Employee Benefits Contribution</b>				
Prop. Mgmt. Payroll Admin Benefits - Admin	15,436	30,872	30,192	27,998
Prop. Mgmt. Payroll Maint. Benefits - Maintenance	12,628	25,256	34,812	18,947
<b>Total Employee Benefits Contribution</b>	<b>28,064</b>	<b>56,128</b>	<b>65,004</b>	<b>46,945</b>
<b>Interest Expense</b>				
Interest on Notes Payable	83,636	167,273	165,996	163,892
<b>Total Interest Expense</b>	<b>83,636</b>	<b>167,273</b>	<b>165,996</b>	<b>163,892</b>
<b>Total General Expenses</b>	<b>181,381</b>	<b>362,763</b>	<b>374,892</b>	<b>372,491</b>
<b>Total Operating Expenses</b>	<b>945,887</b>	<b>1,891,773</b>	<b>1,523,172</b>	<b>1,408,936</b>
<b>NET OPERATING INCOME (LOSS)</b>	<b>(26,443)</b>	<b>(52,885)</b>	<b>380,712</b>	<b>478,276</b>
<b>Net Income (Loss)</b>	<b>(26,443)</b>	<b>(52,885)</b>	<b>380,712</b>	<b>478,276</b>



# HOUSING AUTHORITY OF THE CITY OF AUSTIN

## BOARD ACTION REQUEST

### Assisted Housing ITEM 5.

**MEETING DATE:** February 19, 2026  
**STAFF CONTACT:** Laura Bodai  
**ITEM TITLE:** Presentation, Discussion, and Possible Action regarding Resolution No. 02936: Approval of the revised Housing Choice Voucher Utility Allowance Schedules  
**BUDGETED ITEM:** N/A  
**TOTAL COST:** N/A

### ACTION

Approve Resolution No. 02936 adopting the revised Housing Choice Voucher Program Utility Allowance Schedules, as required by HUD.

### SUMMARY

**Background:**

Per 24 CFR 982.517, Public Housing Authorities must review utility allowances annually and revise them when utility rates change by 10% or more.

**Process:**

Residential Life Utility Allowances, a Division of the Nelrod Company, completed the 2026 utility allowance review for HACA's Housing Choice Voucher Program. A comparison was made between the utility rates shown in the previous study compared to the current utility rates.

The difference in 2025 and 2026 utility allowance rates are summarized in the following table.

Utility Category	2026 Rate Changes
Electric – Austin Energy	<ul style="list-style-type: none"> <li>• Tier-1: decrease of 1%</li> <li>• Tier-2: decrease of 6%</li> <li>• Tier-3: decrease of 5%</li> <li>• Monthly service charge: increase of 10%</li> </ul>

<b>Natural Gas – Texas Gas Service</b>	<ul style="list-style-type: none"> <li>• Gas rates: increase of 43%</li> <li>• Monthly service charge: increase of 19%</li> </ul>
<b>Water – Austin Water (Multifamily)</b>	<ul style="list-style-type: none"> <li>• Water: increase of 4%</li> <li>• Water monthly charges: increase of 3%</li> <li>• Sewer: increase of 3%</li> <li>• Sewer monthly charges: increase of 8%</li> </ul>
<b>Water – Austin Water (Single-Family)</b>	<ul style="list-style-type: none"> <li>• Water tiers: increase of 4% to 8%</li> <li>• Water monthly charges: increase of 5%</li> <li>• Sewer tiers: increase of 17% to 19%</li> <li>• Sewer monthly charges: increase of 8%</li> </ul>
<b>Trash Collection</b>	<ul style="list-style-type: none"> <li>• Monthly charge: increase of 8% (all bedroom sizes)</li> </ul>

Nelrod has certified that the updated schedules are fully compliant with HUD regulations and were developed using HUD’s Utility Schedule Model (HUSM).

Resident Life also prepared a multifamily energy-efficient utility allowance schedule for eligible tax-credit properties using HUD’s Utility Schedule Model with the Energy Star option to reflect energy-efficient consumption levels.

**Staff Recommendation:**

The review indicated that overall rates and charges changed by more than 10%, and therefore the current utility allowance scheduled should be adjusted. Staff recommends approving the six (6) revised utility allowance schedules and the multifamily energy efficient utility allowance schedule. Please find all relevant documents attached.

The revised utility allowance schedules will be effective June 1, 2026, for participants who are issued new vouchers and for annual re-examinations. The multifamily energy-efficient utility allowance schedule will be effective February 19, 2026, and be available for use for any qualified energy-efficient multifamily tax-credit property, per HACA and HUD approval.

**ATTACHMENTS:**

Attachment 1 Proposed 2026 UA Schedules, Attachment 2 Current UA Schedules, Attachment 3 EE UA Schedule, Attachment 4 Nelrod Study 2026 Summary

**RESOLUTION NO. 02936**

**Approval of the adoption of the revised Housing Choice Voucher Utility Allowance Schedules**

**WHEREAS**, Federal Regulations require housing authorities to review utility allowance schedule(s) annually and adjust the schedule(s) if there has been a 10% or more rate change per category since the last revision; and

**WHEREAS**, Residential Life Utility Allowances, a Division of the Nelrod Company, completed the utility allowance review for the Housing Choice Voucher Program and as required by HUD regulations 24 CFR 982.517, a comparison was made of the utility rates utilized in the previous study compared to the current utility rates; and

**WHEREAS**, the utility allowance review indicated that utility providers' rates have changed more than 10%. Therefore, staff recommends revising the utility allowance schedules as reflected in Attachment 1; and

**WHEREAS**, Federal Regulations require the use of the revised utility allowance schedules at the next annual reexamination; and

**WHEREAS**, the Housing Authority of the City of Austin will use the revised utility allowance schedules for new families assisted under the Housing Choice Voucher Program and current participants with reexaminations effective June 1, 2026 or later.

**WHEREAS**, Resident Life Utility Allowances also completed a Multifamily Energy Efficient Utility Allowance Schedule for qualified energy efficient tax credit properties.

**WHEREAS**, the new Multifamily Energy Efficient Utility Allowance Schedule (Attachment 3) will be applicable for any qualified energy efficient multifamily tax credit property, per HACA and HUD approval.

**NOW, THEREFORE, BE IT RESOLVED**, that the Housing Authority of the City of Austin's Board of Commissioners approves and adopts the revised Utility Allowance Schedules for the Housing Choice Voucher Program and the new Multifamily Energy Efficient Utility Allowance Schedule.

**PASSED, APPROVED, AND ADOPTED** this 19th day of February 2026.

\_\_\_\_\_  
Michael G. Gerber, Secretary

\_\_\_\_\_  
Carl S. Richie, Jr., Chairperson

# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Multi-Family (Elevator)</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$23.00	\$27.00	\$31.00	\$32.00	\$36.00	\$38.00
	Bottle Gas						
	Electric	\$9.00	\$11.00	\$13.00	\$16.00	\$18.00	\$21.00
	Fuel Oil						
Cooking	Natural Gas	\$6.00	\$6.00	\$10.00	\$11.00	\$15.00	\$17.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$10.00	\$13.00	\$15.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$35.00	\$38.00	\$46.00	\$54.00	\$63.00	\$72.00
Air Conditioning		\$14.00	\$17.00	\$24.00	\$30.00	\$37.00	\$43.00
Water Heating	Natural Gas	\$11.00	\$13.00	\$19.00	\$25.00	\$31.00	\$36.00
	Bottle Gas						
	Electric	\$11.00	\$13.00	\$16.00	\$20.00	\$23.00	\$26.00
	Fuel Oil						
Water		\$41.00	\$42.00	\$50.00	\$59.00	\$67.00	\$75.00
Sewer		\$90.00	\$92.00	\$108.00	\$125.00	\$142.00	\$159.00
Trash Collection		\$37.00	\$37.00	\$37.00	\$38.00	\$38.00	\$45.00
<b>Other specify: Natural Gas Charge \$23.10</b>		\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	\$23.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
					Heating		
Head of Household Name					Cooking		
					Other Electric		
					Air Conditioning		
Unit Address					Water Heating		
					Water		
					Sewer		
					Trash Collection		
					Other		
Number of Bedrooms					Range/Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Multi-Family (Apartment)</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$23.00	\$27.00	\$31.00	\$32.00	\$36.00	\$38.00
	Bottle Gas						
	Electric	\$9.00	\$11.00	\$13.00	\$16.00	\$18.00	\$21.00
	Fuel Oil						
Cooking	Natural Gas	\$6.00	\$6.00	\$10.00	\$11.00	\$15.00	\$17.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$10.00	\$13.00	\$15.00
Other Electric	<b>(Includes Monthly Charge)</b>	\$35.00	\$38.00	\$46.00	\$54.00	\$63.00	\$72.00
Air Conditioning		\$14.00	\$17.00	\$24.00	\$30.00	\$37.00	\$43.00
Water Heating	Natural Gas	\$11.00	\$13.00	\$19.00	\$25.00	\$31.00	\$36.00
	Bottle Gas						
	Electric	\$11.00	\$13.00	\$16.00	\$20.00	\$23.00	\$26.00
	Fuel Oil						
Water		\$41.00	\$42.00	\$50.00	\$59.00	\$67.00	\$75.00
Sewer		\$90.00	\$92.00	\$108.00	\$125.00	\$142.00	\$159.00
Trash Collection		\$37.00	\$37.00	\$37.00	\$38.00	\$38.00	\$45.00
<b>Other specify: Natural Gas Charge \$23.10</b>		\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	\$23.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
Unit Address					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
					Trash Collection		
Number of Bedrooms					Other		
					Range/Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Row House/Townhouse</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$32.00	\$38.00	\$42.00	\$44.00	\$48.00	\$52.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$19.00	\$22.00	\$25.00	\$28.00
	Fuel Oil						
Cooking	Natural Gas	\$6.00	\$6.00	\$10.00	\$11.00	\$15.00	\$17.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$10.00	\$13.00	\$15.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$39.00	\$44.00	\$54.00	\$65.00	\$76.00	\$86.00
Air Conditioning		\$14.00	\$17.00	\$29.00	\$41.00	\$53.00	\$66.00
Water Heating	Natural Gas	\$13.00	\$17.00	\$25.00	\$32.00	\$38.00	\$46.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$24.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$41.00	\$42.00	\$50.00	\$59.00	\$67.00	\$75.00
Sewer		\$90.00	\$92.00	\$108.00	\$125.00	\$142.00	\$159.00
Trash Collection		\$37.00	\$37.00	\$37.00	\$38.00	\$38.00	\$45.00
<b>Other specify: Natural Gas Charge \$23.10</b>		\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	\$23.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
Unit Address					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
Number of Bedrooms					Trash Collection		
					Other		
					Range/Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

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

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The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Semi-Detached/Duplex</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$32.00	\$38.00	\$42.00	\$44.00	\$48.00	\$52.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$19.00	\$22.00	\$25.00	\$28.00
	Fuel Oil						
Cooking	Natural Gas	\$6.00	\$6.00	\$10.00	\$11.00	\$15.00	\$17.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$10.00	\$13.00	\$15.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$39.00	\$44.00	\$54.00	\$65.00	\$76.00	\$86.00
Air Conditioning		\$14.00	\$17.00	\$29.00	\$41.00	\$53.00	\$66.00
Water Heating	Natural Gas	\$13.00	\$17.00	\$25.00	\$32.00	\$38.00	\$46.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$24.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$41.00	\$42.00	\$50.00	\$59.00	\$67.00	\$75.00
Sewer		\$90.00	\$92.00	\$108.00	\$125.00	\$142.00	\$159.00
Trash Collection		\$37.00	\$37.00	\$37.00	\$38.00	\$38.00	\$45.00
<b>Other specify: Natural Gas Charge \$23.10</b>		\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	\$23.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
Unit Address					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
Number of Bedrooms					Trash Collection		
					Other		
					Range/Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

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

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The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type <b>Single-Family (Detached House)</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$34.00	\$40.00	\$44.00	\$48.00	\$52.00	\$55.00
	Bottle Gas						
	Electric	\$18.00	\$22.00	\$24.00	\$27.00	\$30.00	\$33.00
	Fuel Oil						
Cooking	Natural Gas	\$6.00	\$6.00	\$10.00	\$11.00	\$15.00	\$17.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$10.00	\$13.00	\$15.00
Other Electric	<b>(Includes Monthly Charge)</b>	\$43.00	\$48.00	\$60.00	\$73.00	\$85.00	\$98.00
Air Conditioning		\$11.00	\$13.00	\$29.00	\$46.00	\$63.00	\$81.00
Water Heating	Natural Gas	\$13.00	\$17.00	\$25.00	\$32.00	\$38.00	\$46.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$24.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$41.00	\$42.00	\$50.00	\$59.00	\$67.00	\$75.00
Sewer		\$90.00	\$92.00	\$108.00	\$125.00	\$142.00	\$159.00
Trash Collection		\$37.00	\$37.00	\$37.00	\$38.00	\$38.00	\$45.00
<b>Other specify: Natural Gas Charge \$23.10</b>		\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	\$23.00
Range /Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
					Air Conditioning		
Unit Address					Water Heating		
					Water		
					Sewer		
					Trash Collection		
					Other		
Number of Bedrooms					Range / Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

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

OMB Approval No. 2577-0169  
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The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type <b>Manufactured/Mobile Home</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$29.00	\$34.00	\$36.00	\$40.00	\$44.00	\$48.00
	Bottle Gas						
	Electric	\$20.00	\$24.00	\$24.00	\$25.00	\$25.00	\$26.00
	Fuel Oil						
Cooking	Natural Gas	\$6.00	\$6.00	\$10.00	\$11.00	\$15.00	\$17.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$10.00	\$13.00	\$15.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$43.00	\$48.00	\$60.00	\$73.00	\$85.00	\$98.00
Air Conditioning		\$14.00	\$16.00	\$27.00	\$39.00	\$51.00	\$62.00
Water Heating	Natural Gas	\$13.00	\$17.00	\$25.00	\$32.00	\$38.00	\$46.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$24.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$41.00	\$42.00	\$50.00	\$59.00	\$67.00	\$75.00
Sewer		\$90.00	\$92.00	\$108.00	\$125.00	\$142.00	\$159.00
Trash Collection		\$37.00	\$37.00	\$37.00	\$38.00	\$38.00	\$45.00
<b>Other specify: Natural Gas Charge \$23.10</b>		\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	\$23.00
Range Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
Unit Address					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
Number of Bedrooms					Trash Collection		
					Other		
					Range / Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

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**U.S. Department of Housing and Urban  
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The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Multi-Family -(Elevator)</b>				Date (mm/dd/yyyy) <b>06/01/2025</b>	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$16.00	\$19.00	\$21.00	\$23.00	\$25.00	\$27.00
	Bottle Gas						
	Electric	\$9.00	\$11.00	\$13.00	\$16.00	\$18.00	\$21.00
	Fuel Oil						
Cooking	Natural Gas	\$4.00	\$4.00	\$7.00	\$8.00	\$11.00	\$12.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$11.00	\$13.00	\$16.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$33.00	\$37.00	\$45.00	\$53.00	\$62.00	\$71.00
Air Conditioning		\$15.00	\$17.00	\$24.00	\$30.00	\$37.00	\$44.00
Water Heating	Natural Gas	\$8.00	\$9.00	\$13.00	\$17.00	\$21.00	\$25.00
	Bottle Gas						
	Electric	\$11.00	\$13.00	\$16.00	\$20.00	\$23.00	\$27.00
	Fuel Oil						
Water		\$40.00	\$41.00	\$49.00	\$57.00	\$65.00	\$73.00
Sewer		\$86.00	\$87.00	\$104.00	\$120.00	\$136.00	\$152.00
Trash Collection		\$34.00	\$34.00	\$34.00	\$36.00	\$36.00	\$42.00
<b>Other specify: Natural Gas Charge \$28.35</b>		\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	\$28.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
					Air Conditioning		
Unit Address					Water Heating		
					Water		
					Sewer		
					Trash Collection		
					Other		
Number of Bedrooms					Range/Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

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

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The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Multi-Family - (Apartment)</b>				Date (mm/dd/yyyy) <b>06/01/2025</b>	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$16.00	\$19.00	\$21.00	\$23.00	\$25.00	\$27.00
	Bottle Gas						
	Electric	\$9.00	\$11.00	\$13.00	\$16.00	\$18.00	\$21.00
	Fuel Oil						
Cooking	Natural Gas	\$4.00	\$4.00	\$7.00	\$8.00	\$11.00	\$12.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$11.00	\$13.00	\$16.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$33.00	\$37.00	\$45.00	\$53.00	\$62.00	\$71.00
Air Conditioning		\$15.00	\$17.00	\$24.00	\$30.00	\$37.00	\$44.00
Water Heating	Natural Gas	\$8.00	\$9.00	\$13.00	\$17.00	\$21.00	\$25.00
	Bottle Gas						
	Electric	\$11.00	\$13.00	\$16.00	\$20.00	\$23.00	\$27.00
	Fuel Oil						
Water		\$40.00	\$41.00	\$49.00	\$57.00	\$65.00	\$73.00
Sewer		\$86.00	\$87.00	\$104.00	\$120.00	\$136.00	\$152.00
Trash Collection		\$34.00	\$34.00	\$34.00	\$36.00	\$36.00	\$42.00
<b>Other specify: Natural Gas Charge \$28.35</b>		\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	\$28.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
					Heating		
Head of Household Name					Cooking		
					Other Electric		
					Air Conditioning		
Unit Address					Water Heating		
					Water		
					Sewer		
					Trash Collection		
					Other		
Number of Bedrooms					Range/Microwave		
					Refrigerator		
					Total		



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**U.S. Department of Housing and Urban  
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The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Row House/Townhouse</b>				Date (mm/dd/yyyy) <b>06/01/2025</b>	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$23.00	\$27.00	\$29.00	\$31.00	\$33.00	\$36.00
	Bottle Gas						
	Electric	\$14.00	\$16.00	\$19.00	\$22.00	\$25.00	\$28.00
	Fuel Oil						
Cooking	Natural Gas	\$4.00	\$4.00	\$7.00	\$8.00	\$11.00	\$12.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$11.00	\$13.00	\$16.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$38.00	\$42.00	\$53.00	\$64.00	\$76.00	\$87.00
Air Conditioning		\$14.00	\$17.00	\$29.00	\$41.00	\$54.00	\$67.00
Water Heating	Natural Gas	\$9.00	\$12.00	\$17.00	\$23.00	\$27.00	\$32.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$25.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$40.00	\$41.00	\$49.00	\$57.00	\$65.00	\$73.00
Sewer		\$86.00	\$87.00	\$104.00	\$120.00	\$136.00	\$152.00
Trash Collection		\$34.00	\$34.00	\$34.00	\$36.00	\$36.00	\$42.00
<b>Other specify: Natural Gas Charge \$28.35</b>		\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	\$28.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
Unit Address					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
					Trash Collection		
Number of Bedrooms					Other		
					Range/Microwave		
					Refrigerator		
					Total		



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The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Semi-Detached/Duplex</b>				Date (mm/dd/yyyy) <b>06/01/2025</b>	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$23.00	\$27.00	\$29.00	\$31.00	\$33.00	\$36.00
	Bottle Gas						
	Electric	\$14.00	\$16.00	\$19.00	\$22.00	\$25.00	\$28.00
	Fuel Oil						
Cooking	Natural Gas	\$4.00	\$4.00	\$7.00	\$8.00	\$11.00	\$12.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$11.00	\$13.00	\$16.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$38.00	\$42.00	\$53.00	\$64.00	\$76.00	\$87.00
Air Conditioning		\$14.00	\$17.00	\$29.00	\$41.00	\$54.00	\$67.00
Water Heating	Natural Gas	\$9.00	\$12.00	\$17.00	\$23.00	\$27.00	\$32.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$25.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$40.00	\$41.00	\$49.00	\$57.00	\$65.00	\$73.00
Sewer		\$86.00	\$87.00	\$104.00	\$120.00	\$136.00	\$152.00
Trash Collection		\$34.00	\$34.00	\$34.00	\$36.00	\$36.00	\$42.00
<b>Other specify: Natural Gas Charge \$28.35</b>		\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	\$28.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
Unit Address					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
					Trash Collection		
Number of Bedrooms					Other		
					Range/Microwave		
					Refrigerator		
					Total		



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The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type <b>Single-Family (Detached House)</b>				Date (mm/dd/yyyy) <b>06/01/2025</b>	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$24.00	\$28.00	\$31.00	\$33.00	\$36.00	\$39.00
	Bottle Gas						
	Electric	\$18.00	\$22.00	\$24.00	\$27.00	\$30.00	\$33.00
	Fuel Oil						
Cooking	Natural Gas	\$4.00	\$4.00	\$7.00	\$8.00	\$11.00	\$12.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$11.00	\$13.00	\$16.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$42.00	\$46.00	\$59.00	\$73.00	\$86.00	\$99.00
Air Conditioning		\$11.00	\$13.00	\$30.00	\$47.00	\$65.00	\$83.00
Water Heating	Natural Gas	\$9.00	\$12.00	\$17.00	\$23.00	\$27.00	\$32.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$25.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$40.00	\$41.00	\$49.00	\$57.00	\$65.00	\$73.00
Sewer		\$86.00	\$87.00	\$104.00	\$120.00	\$136.00	\$152.00
Trash Collection		\$34.00	\$34.00	\$34.00	\$36.00	\$36.00	\$42.00
<b>Other specify: Natural Gas Charge \$28.35</b>		\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	\$28.00
Range /Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
					Air Conditioning		
Unit Address					Water Heating		
					Water		
					Sewer		
					Trash Collection		
					Other		
Number of Bedrooms					Range / Microwave		
					Refrigerator		
					Total		



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The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type <b>Manufactured/Mobile Home</b>				Date (mm/dd/yyyy) <b>06/01/2025</b>	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$20.00	\$24.00	\$25.00	\$28.00	\$31.00	\$33.00
	Bottle Gas						
	Electric	\$20.00	\$24.00	\$24.00	\$25.00	\$25.00	\$26.00
	Fuel Oil						
Cooking	Natural Gas	\$4.00	\$4.00	\$7.00	\$8.00	\$11.00	\$12.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$11.00	\$13.00	\$16.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$42.00	\$46.00	\$59.00	\$73.00	\$86.00	\$99.00
Air Conditioning		\$14.00	\$16.00	\$28.00	\$39.00	\$52.00	\$64.00
Water Heating	Natural Gas	\$9.00	\$12.00	\$17.00	\$23.00	\$27.00	\$32.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$25.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$40.00	\$41.00	\$49.00	\$57.00	\$65.00	\$73.00
Sewer		\$86.00	\$87.00	\$104.00	\$120.00	\$136.00	\$152.00
Trash Collection		\$34.00	\$34.00	\$34.00	\$36.00	\$36.00	\$42.00
<b>Other specify: Natural Gas Charge \$28.35</b>		\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	\$28.00
Range Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
					Air Conditioning		
Unit Address					Water Heating		
					Water		
					Sewer		
					Trash Collection		
					Other		
Number of Bedrooms					Range / Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Multi-Family-Energy Efficient</b>				Date (mm/dd/yyyy) <b>06/01/2025</b>	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$13.00	\$16.00	\$17.00	\$19.00	\$20.00	\$23.00
	Bottle Gas						
	Electric	\$8.00	\$9.00	\$11.00	\$13.00	\$15.00	\$17.00
	Electric Heat Pump						
	Fuel Oil						
Cooking	Natural Gas	\$3.00	\$4.00	\$5.00	\$7.00	\$8.00	\$11.00
	Bottle Gas						
	Electric	\$4.00	\$5.00	\$7.00	\$9.00	\$11.00	\$13.00
Other Electric	<i>(Includes climate credit)</i>	\$30.00	\$33.00	\$39.00	\$46.00	\$53.00	\$61.00
Air Conditioning		\$12.00	\$14.00	\$19.00	\$25.00	\$30.00	\$36.00
Water Heating	Natural Gas	\$7.00	\$8.00	\$11.00	\$15.00	\$17.00	\$21.00
	Bottle Gas						
	Electric	\$9.00	\$10.00	\$13.00	\$16.00	\$19.00	\$22.00
	Fuel Oil						
Water		\$37.00	\$40.00	\$48.00	\$56.00	\$64.00	\$71.00
Sewer		\$79.00	\$87.00	\$103.00	\$118.00	\$134.00	\$149.00
Trash Collection		\$34.00	\$34.00	\$34.00	\$36.00	\$36.00	\$42.00
<b>Other specify: Natural Gas Charge \$28.35</b>		\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	\$28.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
					Heating		
Head of Household Name					Cooking		
					Other Electric		
					Air Conditioning		
Unit Address					Water Heating		
					Water		
					Sewer		
					Trash Collection		
					Other		
Number of Bedrooms					Range/Microwave		
					Refrigerator		
					Total		



adapted from form HUD-52667  
(04/2023)

# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Multi-Family Energy Efficient</b>					Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Heating	Natural Gas	\$19.00	\$23.00	\$25.00	\$27.00	\$29.00	\$32.00	
	Bottle Gas							
	Electric	\$7.00	\$9.00	\$11.00	\$13.00	\$15.00	\$17.00	
	Electric Heat Pump							
	Fuel Oil							
Cooking	Natural Gas	\$4.00	\$6.00	\$8.00	\$10.00	\$11.00	\$15.00	
	Bottle Gas							
	Electric	\$4.00	\$4.00	\$7.00	\$9.00	\$11.00	\$13.00	
Other Electric	<i>(Includes climate credit)</i>	\$32.00	\$34.00	\$41.00	\$48.00	\$54.00	\$61.00	
Air Conditioning		\$12.00	\$14.00	\$19.00	\$25.00	\$30.00	\$35.00	
Water Heating	Natural Gas	\$10.00	\$11.00	\$15.00	\$21.00	\$25.00	\$31.00	
	Bottle Gas							
	Electric	\$9.00	\$10.00	\$13.00	\$16.00	\$19.00	\$22.00	
	Fuel Oil							
Water		\$38.00	\$42.00	\$50.00	\$58.00	\$66.00	\$74.00	
Sewer		\$83.00	\$91.00	\$107.00	\$123.00	\$140.00	\$156.00	
Trash Collection		\$37.00	\$37.00	\$37.00	\$38.00	\$38.00	\$45.00	
<b>Other specify: Natural Gas Charge \$23.10</b>		\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance		
					Heating			
Head of Household Name					Cooking			
					Other Electric			
					Air Conditioning			
Unit Address					Water Heating			
					Water			
					Sewer			
					Trash Collection			
					Other			
Number of Bedrooms					Range/Microwave			
					Refrigerator			
					Total			



adapted from form HUD-52667  
(04/2023)

# Utility Allowances

December 2025

## HOUSING AUTHORITY OF THE CITY OF AUSTIN

*Austin, Texas*



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### UPDATE REPORT

### SECTION 8 HCV

### UTILITY ALLOWANCE SURVEY AND STUDY

### (INCLUDES ENERGY EFFICIENT UTILITY ALLOWANCES)

The **Nelrod** Company®

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Email: ResidentLife@nelrod.com – Website: www.nelrod.com

January 15, 2026

Nora Velasco, Director of Operations & Procurement  
Housing Authority of the City of Austin  
1124 S IH 35  
Austin, TX 78704

**Re: Section 8 HCV Utility Allowances (Includes Energy Efficient Utility Allowances Schedule) Update Report - 2025**

Dear Ms. Velasco:

ResidentLife Utility Allowances® is pleased to enclose a copy of the Section 8 Housing Choice Voucher Program Utility Allowances (Includes Energy Efficient Utility Allowances) Update Report – 2024. Please see the Survey and Study Results section of the study analysis for details of changes.

ResidentLife Utility Allowances is putting our seal of compliance on the work we perform for your agency certifying that we have developed your Utility Allowances in compliance with HUD Regulations and guidelines. **We recommend that you post your adopted utility allowance schedule(s) on your webpage. We have made this process easy for you by providing, by email, an electronic version of your currently updated Utility Allowances in a pdf format that is ready to upload directly to your website.** This format displays our Seal of Certified Compliance assuring residents, Agency staff, HUD representatives, or other interested parties, that an approved method was used to efficiently and accurately develop your utility allowances and that the utility allowances are current.

Please carefully review this report for any identifiable problems, changes, corrections, and/or special needs and let me know if you have any changes or questions as soon as possible. If there are no changes requested to this report, then this report serves as the final report as well. **See attached Closure Acceptance Statement. Please sign and return as soon as possible.** You can contact me at (817) 922-9000 ext 140 or amy@nelrod.com. It is a pleasure working with your agency and we will contact you again next year.

Sincerely,

*Amy Machala*

Amy Machala  
ResidentLife Utility Allowances® Specialist  
Enclosure

Disclaimer: ResidentLife Utility Allowances® will make any necessary corrections to work previously performed prior to submission of final report. It is important to note that many local communities have different rate structures, weather patterns, types of charges, etc. ResidentLife Utility Allowances® has made every effort to be as accurate as possible, but will not be held responsible for changes involving different methodologies, rate structures, regulatory changes, omission and/or misinformation of cost calculation data from utility providers, selection of most advantageous cost calculation methodology in areas with multiple costing methods, and inaccurate allowances resulting from lack of information or data not provided by the agency.



Email: ResidentLife@nelrod.com – Website: www.nelrod.com

## Closure Acceptance Statement

**Re: Section 8 HCV Utility Allowances (Includes Energy Efficient Utility Allowances Schedule) Update Report - 2025**

Upon signing this Closure Statement, I, \_\_\_\_\_, on behalf of the **Housing Authority of the City of Austin, TX** acknowledge receipt of the survey study report.

I, or a member of our agency staff, have reviewed this report and have requested edits, changes or additions if needed. Our agency now accepts this survey study report as final. This does not mean that we will adopt these results as our Agency's actual allowances.

Signed

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

**Please sign and return within 30 days  
fax to: (817) 922-9100 or email to residentlife@nelrod.com**

**Job# 1019-RU-014**

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# **OBJECTIVES AND METHODOLOGY**

# OBJECTIVES AND METHODOLOGY

## Section 8 Housing Choice Voucher Program (Standard and Energy Efficient) ANNUAL UPDATE 2025

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### **Utility Rate Comparison**

As required by HUD regulations 24 CFR 982.517, prior to beginning this update study for the **Housing Authority of the City of Austin, TX**, a comparison (annual review) was made of the utility rates and charges (**November 2024**) utilized in the previous study and the current utility rates and charges (**December 2025**). This comparison indicated that Austin Energy's electric tier-1 rate decreased 1%, tier-2 rate decreased 6%, tier-3 rates decreased 5%, the monthly charge increased 10%, and taxes remained the same. Texas Gas Services' natural gas rates increased 43%, the monthly charges increased 19%, and taxes remained the same. Austin Water's Multi-Family water rates increased 4% and the monthly charges increased 3%, sewer rates increased 3% and the monthly charges increased 8%, and Single-Family water tier-1 rates increased 4%, tier-2 rates increased 6%, tier-3 rates increased 8%, and the monthly charges increased 5% each 5%, sewer rates tier-1 increased 17%, tier-2 increased 19%, and the monthly charges increased 8%. And trash collection monthly charge increased 8% for 0-2 br, 3-5 brr increased 8% each, and taxes remained the same. (See comparison in Support Documentation section of this report.) Since the utility providers' **rates and charges** have changed more than 10%, the current utility allowance schedule will be adjusted. This does not mean that **utility allowances** will change by the actual percentage values listed above.

### **Objective**

The objective of this study is to update current **standard** and **energy efficient** Section 8 Housing Choice Voucher Program utility allowances for electricity, natural gas, water, sewer, and trash collection with current rates and charges for each utility provider. HUD's Utility Schedule Model (**HUSM-Ver13i\_813\_Summit-Update**) will be used in this update study.

*This Section 8 Housing Choice Voucher Program update study will be conducted in accordance with HUD Regulations 24 CFR 982.517 Utility Allowance Schedule.*

## ***Methodology***

The following steps were taken by a utility allowances specialist to accomplish the above objective:

### ***1. Utility Rates and Charges***

The following information was obtained by a rate specialist and input in the Utility Providers Residential Rates and Charges document:

- a. Documentation on current residential **electric** rates and charges from **Austin Energy** through their internet website and telephone inquiries.
- b. Documentation on current residential **natural gas** rates and charges from **Texas Gas Service** through their internet website and telephone inquiries.
- c. Documentation on current residential **water and sewer** rates and charges from **Austin Water** through their internet website and telephone inquiries.
- d. Documentation on current residential **trash collection** charges from the **Austin Water** through their internet website and telephone inquiries.

### ***2. Comparison of Utility Rates and Charges***

A rate specialist created charts comparing the previously applied electric, natural gas, water, sewer, and trash collection rates and charges for each provider to their current utility rates and charges. These charts calculate a percentage difference.

A rate specialist then analyzed the comparison charts and emailed the draft charts to the Agency with the recommendation to adjust current utility allowances due to a greater than 10% change in utility rates (HUD Regulations 24 CFR 982.517(c)(1)).

### ***3. Data Gathering***

#### ***a. Currently Adopted Utility Allowances***

A copy of the currently adopted Section 8 HCV Utility Allowance Schedules was requested and received from the Agency.

b. *Monthly Utility Consumption Averages and Climatic Adjustment*

HUD's Utility Schedule Model (**Ver13i\_813\_Summit-Update**) was utilized for the base community-wide consumptions which take into consideration current usage patterns and more energy efficient equipment. This tool provides for a "**Green Discount**" choice of "**None**" (**Standard**), "**Energy Star**", "**LEED**", or "**Significant Green Retrofit**". Choosing "**None**" provides "**Standard**" equipment and measures, and choosing "**Energy Star**", "**LEED**", or "**Significant Green Retrofit**" provides "**Energy Efficient**" equipment and measures. Each selection modifies the consumption averages.

In this engineering-methodology study "**None**" was chosen for **standard utility allowances** and "**Energy Star**" was chosen for **Energy Efficient** utility allowances.

The HUSM tool provides a choice of locations for the climatic adjustment of the base consumptions, by housing agency code or zip code. For agencies that cover more than one climatic zone, we utilize climatic data from the PHA\_Average\_HDD-CDD spreadsheet to determine the appropriate base consumptions.

HUD's tool combines consumptions and utility allowances for the building types, **Row House and Semi-Detached** together on one form HUD-52667.

**Water** average consumption is based on a national average, acquired via internet research, per building type and bedroom size.

**There was no change in the consumption averages from the last study.**

4. *Utility Allowance Adjustments (Cost of Consumption)*

The following steps were taken by a utility allowance specialist:

- a. Updated the Cost of Consumption charts from the previous study with current utility rates and charges for **electric** usage for each building type and each bedroom size.
- b. Updated the Cost of Consumption charts from the previous study with current utility rates and charges for **natural gas** usage for each building type and each bedroom size.

- c. Updated the Cost of Consumption charts from the previous study with current utility rates and charges for **water and sewer** usage for **each provider**, each building type, and each bedroom size.
- d. Applied the current **trash collection** charge.

These new utility allowances were entered into **7** forms HUD-52667 for applicable building types.

## 5. [Section 8 Utility Allowance Schedules - Form HUD-52667](#)

ResidentLife Utility Allowances<sup>®</sup> has provided **7** updated forms HUD-52667, one each for **Multi-Family (Elevator), Multi-Family (Apartment), Row House/Townhouse, Semi-Detached/Duplex, Single-Family (Detached House), and Manufactured/Mobile**, and a **Multi-Family Energy Efficient**.

**NOTE 1:** The **Natural Gas** utility provider has a **monthly customer charge** that is not based on consumption. This charge is shown in the "Other-Specify:" row of the form HUD-52667. This charge should be added for residents utilizing this utility but add it only one time. (See Explanation...Monthly Fixed Charges following these HUD forms). The **Electric** utility provider has a **Monthly Charge** that is not based on consumption. This charge has been calculated from the "Other Electric, Lighting, Refrigeration, Etc." calculations and is included in the "Other Electric" (Lights & Appliances) row of the form HUD-52667, **per the Agency**.

**NOTE 2:** If the owner/landlord does not provide a range or refrigerator with the leased unit, the agency must provide an allowance for the **tenant-provided range or refrigerator**, to supplement maintenance costs, and should be based on the lesser of the cost of leasing or installment purchasing of suitable equipment. Microwave applies only to studio/efficiency units that do not have a range/stove cooking source. Who provided the range and refrigerator must be indicated on the Request for Tenancy Approval (RFTA) and dwelling unit lease.

**NOTE 3:** For your convenience, we have provided utility allowances for Reasonable Accommodations medical equipment.

**NOTE 4:** On December 20, 2018, HUD revised the Section 8 HCV utility allowance regulations (24 CFR §982.517) item (d) Use of Utility Allowances Schedule, to now specify "The PHA must use the appropriate utility allowance for the lesser of the size of dwelling unit actually leased by the family or the family unit size as determined under the PHA subsidy standards." See HUD regulations for the exceptions.

**NOTE 5:** According to HUD’s instructions provided with form HUD-52667, this form shall be reproduced by the Agency and given to families with their Voucher or subsequently in connection with any revisions. This 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. This form shall also be used by the Agency to record the actual allowance for each family and this form must be maintained in the tenant’s file.

## 6. Support Documentation

Per HUD regulations (24 CFR 982.517(c)(1)), the Agency must maintain information supporting its annual review of utility allowances and any revisions made in its utility allowance schedule.

This report contains a copy of all such supporting documentation.

## 7. Annual Update

Section 8 Housing Choice Voucher HUD regulations (24 CFR 982.517(a)(2)) state that housing authorities **must review its schedule of utility allowances each year**, and **must revise** its allowance for a utility category **if there has been a change of 10%** or more in the utility rate since the last time the utility allowance schedule was revised. **If the Energy Efficient utility allowances are going to be used by affordable housing Tax Credit developers and builders, these allowances must be updated annually, regardless of 10% rate change.**

## 8. Submission of Adopted Utility Allowance Schedule

According to Section 8 Housing Choice Voucher Program HUD Regulations (24 CFR 982.517(a)(2)), a copy of the adopted utility allowance schedules (form HUD-52667) must be sent to your local HUD Field Office. At HUD’s request, the Agency also must provide any information or procedures used in the preparation of the schedule.

## 9. Reasonable Accommodations

We have provided utility allowances for Reasonable Accommodations medical equipment. If a family has a person with disabilities, and they need a higher utility allowance as a reasonable accommodation (in accordance with 24 CFR part 8, they may make a request to the housing agency. The housing agency must approve the higher utility allowance to make the program accessible to, and usable by, the family member with a disability (24 CFR 982.517(e)).

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# **SURVEY AND STUDY RESULTS**

# SURVEY AND STUDY RESULTS

## SECTION 8 HOUSING CHOICE VOUCHER

### (Standard and Energy Efficient)

## ANNUAL UPDATE 2025

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The HUD Regulation (24 CFR 982.517) requirement of a comparison of the utility providers' rates and charges was conducted and indicated a greater than 10% change in utility rates and charges since the 2024 study was conducted (refer to page 2, first paragraph, and/or the Comparison of Previous and Current Utility Rates, in the Support Documentation section of this report). Therefore, the **Housing Authority of the City of Austin, TX** is updating utility allowances (using HUSM, conversion factors, and national averages) for electricity, natural gas, water, sewer, and trash collection for a **Section 8 HCV Multi-Family (Elevator), Multi-Family (Apartment), Row House/Townhouse, Semi-Detached /Duplex, Single-Family (Detached House), and Manufactured/Mobile Home, and a Multi-Family Energy Efficient.**

*This update study was conducted in accordance with HUD Regulations 24 CFR 982.517 Utility Allowance Schedule (Section 8 Housing Choice Voucher Program). HUSM-Ver13i\_813\_Summit-Update was used.*

The proposed Section 8 HCV Utility Allowances are shown in the following section on **7** forms HUD-52667.

**SECTION 8 UTILITY ALLOWANCE SCHEDULES  
(form HUD-52667)**

# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Multi-Family (Elevator)</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$23.00	\$27.00	\$31.00	\$32.00	\$36.00	\$38.00
	Bottle Gas						
	Electric	\$9.00	\$11.00	\$13.00	\$16.00	\$18.00	\$21.00
	Fuel Oil						
Cooking	Natural Gas	\$6.00	\$6.00	\$10.00	\$11.00	\$15.00	\$17.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$10.00	\$13.00	\$15.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$35.00	\$38.00	\$46.00	\$54.00	\$63.00	\$72.00
Air Conditioning		\$14.00	\$17.00	\$24.00	\$30.00	\$37.00	\$43.00
Water Heating	Natural Gas	\$11.00	\$13.00	\$19.00	\$25.00	\$31.00	\$36.00
	Bottle Gas						
	Electric	\$11.00	\$13.00	\$16.00	\$20.00	\$23.00	\$26.00
	Fuel Oil						
Water		\$41.00	\$42.00	\$50.00	\$59.00	\$67.00	\$75.00
Sewer		\$90.00	\$92.00	\$108.00	\$125.00	\$142.00	\$159.00
Trash Collection		\$37.00	\$37.00	\$37.00	\$38.00	\$38.00	\$45.00
<b>Other specify: Natural Gas Charge \$23.10</b>		\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	\$23.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
					Heating		
Head of Household Name					Cooking		
					Other Electric		
					Air Conditioning		
Unit Address					Water Heating		
					Water		
					Sewer		
					Trash Collection		
					Other		
Number of Bedrooms					Range/Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Multi-Family (Apartment)</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$23.00	\$27.00	\$31.00	\$32.00	\$36.00	\$38.00
	Bottle Gas						
	Electric	\$9.00	\$11.00	\$13.00	\$16.00	\$18.00	\$21.00
	Fuel Oil						
Cooking	Natural Gas	\$6.00	\$6.00	\$10.00	\$11.00	\$15.00	\$17.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$10.00	\$13.00	\$15.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$35.00	\$38.00	\$46.00	\$54.00	\$63.00	\$72.00
Air Conditioning		\$14.00	\$17.00	\$24.00	\$30.00	\$37.00	\$43.00
Water Heating	Natural Gas	\$11.00	\$13.00	\$19.00	\$25.00	\$31.00	\$36.00
	Bottle Gas						
	Electric	\$11.00	\$13.00	\$16.00	\$20.00	\$23.00	\$26.00
	Fuel Oil						
Water		\$41.00	\$42.00	\$50.00	\$59.00	\$67.00	\$75.00
Sewer		\$90.00	\$92.00	\$108.00	\$125.00	\$142.00	\$159.00
Trash Collection		\$37.00	\$37.00	\$37.00	\$38.00	\$38.00	\$45.00
<b>Other specify: Natural Gas Charge \$23.10</b>		\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	\$23.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
Unit Address					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
Number of Bedrooms					Trash Collection		
					Other		
					Range/Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Row House/Townhouse</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$32.00	\$38.00	\$42.00	\$44.00	\$48.00	\$52.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$19.00	\$22.00	\$25.00	\$28.00
	Fuel Oil						
Cooking	Natural Gas	\$6.00	\$6.00	\$10.00	\$11.00	\$15.00	\$17.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$10.00	\$13.00	\$15.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$39.00	\$44.00	\$54.00	\$65.00	\$76.00	\$86.00
Air Conditioning		\$14.00	\$17.00	\$29.00	\$41.00	\$53.00	\$66.00
Water Heating	Natural Gas	\$13.00	\$17.00	\$25.00	\$32.00	\$38.00	\$46.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$24.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$41.00	\$42.00	\$50.00	\$59.00	\$67.00	\$75.00
Sewer		\$90.00	\$92.00	\$108.00	\$125.00	\$142.00	\$159.00
Trash Collection		\$37.00	\$37.00	\$37.00	\$38.00	\$38.00	\$45.00
<b>Other specify: Natural Gas Charge \$23.10</b>		\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	\$23.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
Unit Address					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
Number of Bedrooms					Trash Collection		
					Other		
					Range/Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Semi-Detached/Duplex</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$32.00	\$38.00	\$42.00	\$44.00	\$48.00	\$52.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$19.00	\$22.00	\$25.00	\$28.00
	Fuel Oil						
Cooking	Natural Gas	\$6.00	\$6.00	\$10.00	\$11.00	\$15.00	\$17.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$10.00	\$13.00	\$15.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$39.00	\$44.00	\$54.00	\$65.00	\$76.00	\$86.00
Air Conditioning		\$14.00	\$17.00	\$29.00	\$41.00	\$53.00	\$66.00
Water Heating	Natural Gas	\$13.00	\$17.00	\$25.00	\$32.00	\$38.00	\$46.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$24.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$41.00	\$42.00	\$50.00	\$59.00	\$67.00	\$75.00
Sewer		\$90.00	\$92.00	\$108.00	\$125.00	\$142.00	\$159.00
Trash Collection		\$37.00	\$37.00	\$37.00	\$38.00	\$38.00	\$45.00
<b>Other specify: Natural Gas Charge \$23.10</b>		\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	\$23.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
Unit Address					Other Electric		
					Air Conditioning		
					Water Heating		
Number of Bedrooms					Water		
					Sewer		
					Trash Collection		
					Other		
Number of Bedrooms					Range/Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type <b>Single-Family (Detached House)</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$34.00	\$40.00	\$44.00	\$48.00	\$52.00	\$55.00
	Bottle Gas						
	Electric	\$18.00	\$22.00	\$24.00	\$27.00	\$30.00	\$33.00
	Fuel Oil						
Cooking	Natural Gas	\$6.00	\$6.00	\$10.00	\$11.00	\$15.00	\$17.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$10.00	\$13.00	\$15.00
Other Electric	<b>(Includes Monthly Charge)</b>	\$43.00	\$48.00	\$60.00	\$73.00	\$85.00	\$98.00
Air Conditioning		\$11.00	\$13.00	\$29.00	\$46.00	\$63.00	\$81.00
Water Heating	Natural Gas	\$13.00	\$17.00	\$25.00	\$32.00	\$38.00	\$46.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$24.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$41.00	\$42.00	\$50.00	\$59.00	\$67.00	\$75.00
Sewer		\$90.00	\$92.00	\$108.00	\$125.00	\$142.00	\$159.00
Trash Collection		\$37.00	\$37.00	\$37.00	\$38.00	\$38.00	\$45.00
<b>Other specify: Natural Gas Charge \$23.10</b>		\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	\$23.00
Range /Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
					Air Conditioning		
Unit Address					Water Heating		
					Water		
					Sewer		
					Trash Collection		
					Other		
Number of Bedrooms					Range / Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type <b>Manufactured/Mobile Home</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$29.00	\$34.00	\$36.00	\$40.00	\$44.00	\$48.00
	Bottle Gas						
	Electric	\$20.00	\$24.00	\$24.00	\$25.00	\$25.00	\$26.00
	Fuel Oil						
Cooking	Natural Gas	\$6.00	\$6.00	\$10.00	\$11.00	\$15.00	\$17.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$10.00	\$13.00	\$15.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$43.00	\$48.00	\$60.00	\$73.00	\$85.00	\$98.00
Air Conditioning		\$14.00	\$16.00	\$27.00	\$39.00	\$51.00	\$62.00
Water Heating	Natural Gas	\$13.00	\$17.00	\$25.00	\$32.00	\$38.00	\$46.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$24.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$41.00	\$42.00	\$50.00	\$59.00	\$67.00	\$75.00
Sewer		\$90.00	\$92.00	\$108.00	\$125.00	\$142.00	\$159.00
Trash Collection		\$37.00	\$37.00	\$37.00	\$38.00	\$38.00	\$45.00
<b>Other specify: Natural Gas Charge \$23.10</b>		\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	\$23.00
Range Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
Unit Address					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
Number of Bedrooms					Trash Collection		
					Other		
					Range / Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

**U.S. Department of Housing and Urban  
Development**

Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Multi-Family Energy Efficient</b>					Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Heating	Natural Gas	\$19.00	\$23.00	\$25.00	\$27.00	\$29.00	\$32.00	
	Bottle Gas							
	Electric	\$7.00	\$9.00	\$11.00	\$13.00	\$15.00	\$17.00	
	Electric Heat Pump							
	Fuel Oil							
Cooking	Natural Gas	\$4.00	\$6.00	\$8.00	\$10.00	\$11.00	\$15.00	
	Bottle Gas							
	Electric	\$4.00	\$4.00	\$7.00	\$9.00	\$11.00	\$13.00	
Other Electric	<i>(Includes climate credit)</i>	\$32.00	\$34.00	\$41.00	\$48.00	\$54.00	\$61.00	
Air Conditioning		\$12.00	\$14.00	\$19.00	\$25.00	\$30.00	\$35.00	
Water Heating	Natural Gas	\$10.00	\$11.00	\$15.00	\$21.00	\$25.00	\$31.00	
	Bottle Gas							
	Electric	\$9.00	\$10.00	\$13.00	\$16.00	\$19.00	\$22.00	
	Fuel Oil							
Water		\$38.00	\$42.00	\$50.00	\$58.00	\$66.00	\$74.00	
Sewer		\$83.00	\$91.00	\$107.00	\$123.00	\$140.00	\$156.00	
Trash Collection		\$37.00	\$37.00	\$37.00	\$38.00	\$38.00	\$45.00	
<b>Other specify: Natural Gas Charge \$23.10</b>		\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	\$23.00	
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance		
					Heating			
Head of Household Name					Cooking			
					Other Electric			
					Air Conditioning			
Unit Address					Water Heating			
					Water			
					Sewer			
					Trash Collection			
					Other			
Number of Bedrooms					Range/Microwave			
					Refrigerator			
					Total			



adapted from form HUD-52667  
(04/2023)

## **Reasonable Accommodation Medical Equipment Allowances**

### **Electric Provider: Austin Energy**

<b>Item</b>	<b>Hours per Day</b>	<b>Wattage</b>	<b>Monthly kWh</b>	<b>Energy Charge</b>	<b>Utility Allowance</b>
Oxygen Concentrator	18	400	223	0.11165	\$25.00
Nebulizer	2	75	5	0.11165	\$1.00
Electric Hospital Bed	0.2	200	1	0.11165	\$1.00
Alternating Pressure Pad	24	70	52	0.11165	\$6.00
Low Air-Loss Mattress	24	120	89	0.11165	\$10.00
Power Wheelchair/Scooter	3	360	33	0.11165	\$4.00
Feeding Tube Pump	24	120	89	0.11165	\$10.00
CPAP Machine	10	30	9	0.11165	\$1.00
Leg Compression Pump	24	30	22	0.11165	\$2.00
Dialysis Machine/Equipment	2	710	44	0.11165	\$5.00

#### ***Oxygen Concentrator***

Use per day varies, assume 12-14 hours a day. The 5-Liter model uses 400 W, the 3-Liter model uses 320 W.

#### ***Nebulizer***

A medicine delivery system used mostly for pediatric care. Used 4-6 times a day for 20 minutes at a time at 75W.

#### ***Semi/Fully Electric Hospital Bed***

Use depends on adjustments. 200 W.

#### ***Alternating Pressure Pad***

An air-filled mattress overlay. Used 24 hours a day for someone who is bed-ridden.

#### ***Low Air-Loss Mattress***

Takes the place of mattress - air -filled pressurized mattress. Cycles air around every 15-20 minutes.

#### ***Power Wheelchairs and Scooters***

Need to be charged approximately 8 hours every 3 days. Batteries are 120 V, 3 Amp, 360 W.

#### ***Feeding Tube Pump (Continuous Feed)***

A pump delivers a constant amount of formula throughout the day or night.

#### ***CPAP Machine***

For Sleep Apnea. Runs only at night for people who have a tendency to stop breathing at night. At maximum pressure use is 40 Watts. On average - 30 Watts

#### ***Leg Compression Pump***

Provides intensive compression therapy. Use varies, generally from 8-24 hours daily.

#### ***Dialysis Machine/Equipment (Small/Portable)***

Filters a patient's blood to remove excess water and waste products. Used 2 hours daily.

## **INSTRUCTIONS FOR HUD FORMS-52667 UTILITY ALLOWANCE SCHEDULE**

PHAs must maintain a completed HUD Form-52667 Utility Allowance Schedule for each unit type that is typical in the PHA's jurisdiction. The utility allowance schedule is based on the typical cost of utilities and services paid by energy conservation households that occupy housing of similar size and type in the same locality. In developing the schedule, the PHA must use normal patterns of consumption for the community as a whole and current utility rates.

This form includes the utilities that the PHA must consider: heating (space), cooking, other electric (e.g. lights, appliances, general usage), air conditioning (if the majority of housing units in the market provide centrally airconditioned units or there is appropriate wiring for tenant-installed air conditioners), water heating, water, sewer, trash, the cost to provide a range, and the cost to provide a refrigerator. This form includes several fuel types, however, the PHA is not required to have a utility allowance for every fuel type listed on the form. The PHA is only required to have an allowance for the fuel types that are typical in the PHA's jurisdiction.

Electric resistance vs. electric heat pump: The most recent update to the HUD-52667 includes "Electric Heat Pump" as a fuel type under "Heating". PHAs may choose to provide an allowance on the schedule for electric (resistance), electric heat pump, or both. Heat pumps are more efficient and are associated with lower consumption. By adding this to the form, HUD is not requiring PHAs to consider both. This is up to the PHA, however, the [HUD Utility Schedule Model](#) tool available on HUDUser.gov provides an allowance for both electric resistance and electric heat pump.

Determining Allowances: In general, PHAs use local sources of information on the cost of utilities and services, such as:

1. Electric utility suppliers
2. Natural gas utility suppliers
3. Water and sewer suppliers
4. Fuel oil and bottled gas suppliers
5. Public service commissions
6. Real estate and property management firms
7. State and local agencies
8. Appliance sales and leasing firms

PHAs may use the HUD Utility Schedule Model (HUSM) available on HUDUser.org to determine their Utility Allowance Schedules. The tool uses geographic-specific utility consumption rates combined with user entered data on utility rates to determine the overall monthly allowance

The public reporting burden for this information collection is estimated to be up to 0.25 hours, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The Department of Housing and Urban Development (HUD) is authorized to collect the information on this form by Section 8 of the U.S. Housing Act (42 U.S.C. 1437f). Form is only valid if it includes an OMB Control Number.

**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 members' names and unit address, and owner's name and payment address is mandatory. The information is used to provide Section 8 tenant-based assistance under the Housing Choice Voucher program in the form of housing assistance payments. The information also specifies what utilities and appliances are to be supplied by the owner, and what utilities and appliances are to be supplied to the tenant. 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 family or owner participation in the program.

Previous versions are obsolete.

**Form HUD-52667 (04/2023)**

# UTILITY ALLOWANCES MONTHLY FIXED CHARGES

## Form HUD-52667

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### **Explanation of Utility Provider Monthly Fixed Charges** **(Monthly Customer Charge - See "Other-specify")**

- Fact 1: Utility providers do not separate consumption usage like that required for the form HUD-52667 (by end-uses: Space Heating is Natural Gas; Cooking is Natural Gas; Water Heating is Natural Gas; or Space Heating is Electric; etc.).
- Fact 2: Most utility providers bill their customers a service charge that is not based on usage. It is usually called a Monthly Customer Charge (e.g. Base Charge, Service Availability Charge, etc.). Some utility providers have an ongoing monthly (or Semi-Annual) credit. It is added to (or subtracted from) the customer's bill each month. Even if the client does not use any utilities during the month, they are still billed a monthly service charge.
- Fact 3: Per HUD regulations, Section 8 HCV Utility Allowances are based on the community as-a-whole. Your agency doesn't necessarily know in advance what utilities the tenant will have to pay, or whether the unit has natural gas appliances, bottle gas service, etc.

### **Service Fixed Charge (Monthly Customer Charge)**

Therefore, since the service charge is not based on consumption usage, it cannot be divided equally between the end-uses on the form HUD-52667. That is why HUD supplied a row on the utility allowance schedule labeled "**Other-specify**". This row is to be used for **any monthly charges** that cannot be divided or combined with any other end-use. Some examples of customer charges: extermination charge for mosquito spraying (which is billed to tenant by the City even though the tenant themselves do not pay for water usage); fire protection charge; street lights; etc.).

### **Calculating Total Utility Allowances on form HUD-52667**

#### ***Natural Gas Service Monthly Fixed Charge***

When the total utility allowance is calculated for a particular unit which has natural gas appliances, if the tenant pays natural gas utilities, and the utility provider has a monthly service charge, **add the service charge amount once in the "per month cost" column on the form HUD-52667**. It does not matter how many appliances the tenant has that are fueled by natural gas.

#### ***Electric Service Monthly Fixed Charge***

All dwelling units are supplied with electricity. Some housing agency's management systems software is not designed with these separate allowances entry, therefore, they have chosen to include the **electric monthly charge** in the calculations in the "Other Electric (Lights and Appliances) allowances.

## Description of Unit (Structure/Building) Types (Grouped by use of Energy)

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### 1. **Apartment/Walk-Up/Condominium/GardenApartment/Low-Rise/Flat/Mid-Rise (Multi-Family) – 3 or More Units**

Building with a group of individual units with 2 or more common walls; attached to other units; separate entrances, and may have common staircases.

- Each building may have an end unit, inside unit, top unit, bottom unit, etc.
- Usually, but not always, have units on both sides of building.
- Apartments usually have one owner while condominiums are usually individually owned.

### 2. **High-Rise Apartment (Multi-Family) – 5 or More Units**

A multi-unit building; 5 or more stories; sharing one or more common entrances (may have elevator).

### 3. **Row House/Townhouse/Triplex/Fourplex/Multiplex (Multi-Family) - 3 or More Units**

An individual unit attached to other individual units; 1 or more common walls; separate ground level entrances; 1 or 2 story units.

- Each building will have end units and inside units.
- Fourplex units usually share 2 common walls; can be square-shaped or L-shaped.
- Triplex building can be V-shaped.

### 4. **Semi-Detached/Duplex (Multi-Family)**

Building with 2 individual housing units; with separate entrances; one common wall; 1 or 2 story units.

### 5. **Detached House (Single-Family)**

A detached building intended to house one family; sits on its own piece of land; not attached to another dwelling.

### 6. **Manufactured/Mobile Home (Single-Family)**

A detached movable or portable housing structure; at least 32 feet in length and over 8 feet in width; constructed to be towed on its own chassis and designed to be installed with or without a permanent foundation.

- May be 2 or more units fitted together to make one residence.

## **SECTION 8 CONSUMPTION SOURCES AND ADJUSTMENTS**

## SECTION 8 CONSUMPTION SOURCES AND ADJUSTMENTS

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We have utilized HUD's engineering-methodology tool for developing the base consumptions and utility allowances for the Section 8 Program. The Microsoft Excel spreadsheet HUD Utility Schedule Model (**HUSM-Ver13i\_813\_Summit-Update**) is available on HUD User's website.

**Note: HUSM-Ver13i\_813\_Summit-Update includes allowances for a Heat Pump for Electric space Heating. Only one type of Heating should be chosen for determining the total utility allowances for a unit.**

HUSM is a tool provided by HUD for use in Section 8 HCV utility allowances. HUD realizes there may be errors or discrepancies in the database regarding consumptions and adjustments, and expects the user to correct them as needed.

***The Nelrod Company and its ResidentLife Utility Allowance division assume no liability for discrepancies in the HUD HUSM Tool or from uses of the outcome data produced and utilized for utility allowances.***

**This tool provides for a choice of "None" (Standard), "Energy Star", "LEED", or "Significant Green Retrofit", utility allowances.**

The HUSM tool provides a choice of locations for the climatic adjustment of the base consumptions, by housing agency code or zip code. For agencies that cover more than one climatic zone, we utilize climatic data from the PHA\_Average\_HDD-CDD spreadsheet to determine the appropriate base consumptions.

HUD's tool combines consumptions and allowances for the building types, **Row House and Semi-Detached** together on one form HUD-52667.

**Water** average consumption is based on a national average, acquired via internet research, per building type and bedroom size.

Since HUSM only provides export of the results of the calculations on the form HUD-52667, we have provided in this report Cost of Consumption charts showing how the allowances are calculated for each applicable building type, fuel type and bedroom size.

**Tenant Purchased Refrigerator and/or Range:**

Allowances for ranges and refrigerators must be based on the lesser of the cost of leasing or installment purchasing of suitable equipment (reference Instructions to Form HUD-52667). This allowance is not intended to cover the cost of purchase or lease of the appliance. The maintenance of a landlord-provided appliance is the responsibility and cost of the landlord. This allowance is provided to supplement the tenant-supplied appliance's maintenance cost.

This amount is added to the monthly utility allowance only if the dwelling unit was not furnished with a refrigerator, a range (stove), or for a SRO (Single Room Occupancy-studio unit) a microwave, and the tenant has had to purchase or lease the appliance(s). Note: An allowance cannot be given for both a range and a microwave.

**Range or Microwave (for SRO or Studio Units) Purchase/Lease**

\$450.00 (includes tax) @ 14.95% add-on interest for 60 months = \$11.00

**Refrigerator Purchase/Lease**

\$500.00 (includes tax) @ 14.95% add-on interest for 60 months = \$12.00

## **SECTION 8 CONSUMPTIONS**

# HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX

## Standard Schedule

HUSM 13i for Section 8 Housing Choice Voucher Program

January 15, 2026

<b>Apartment - Total Monthly Consumptions</b>							
<b>Utility or Service</b>	<b>Units</b>	<b>0BR</b>	<b>1BR</b>	<b>2BR</b>	<b>3BR</b>	<b>4BR</b>	<b>5BR</b>
Heating with Natural Gas	therms	12	14	16	17	19	20
Heating with Electric Resistance	kWh	79	93	115	137	159	180
Cooking with Natural Gas	therms	3	3	5	6	8	9
Cooking with Electricity	kWh	41	48	70	91	113	134
Other Electric	kWh	154	182	253	324	395	466
Air Conditioning	kWh	125	147	204	261	317	374
Water Heating with Natural Gas	therms	6	7	10	13	16	19
Water Heating with Electricity	kWh	93	109	140	170	200	230

### Developed by ResidentLife Utility Allowances®

Water	gal	3600	3750	5250	6750	8250	9750
Sewer	gal	3600	3750	5250	6750	8250	9750

Based on research of national averages

# HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX

## Standard Schedule

HUSM 13i for Section 8 Housing Choice Voucher Program

January 15, 2026

### Row House/Townhouse/Semi-Detached/Duplex - Total Monthly Consumptions

Utility or Service	Units	0BR	1BR	2BR	3BR	4BR	5BR
Heating with Natural Gas	therms	17	20	22	23	25	27
Heating with Electric Resistance	kWh	117	138	165	192	218	245
Cooking with Natural Gas	therms	3	3	5	6	8	9
Cooking with Electricity	kWh	41	48	70	91	113	134
Other Electric	kWh	195	230	319	409	499	589
Air Conditioning	kWh	123	145	248	352	455	558
Water Heating with Natural Gas	therms	7	9	13	17	20	24
Water Heating with Electricity	kWh	116	137	175	212	250	288

### Developed by ResidentLife Utility Allowances®

Water	gal	3600	3750	5250	6750	8250	9750
Sewer	gal	3600	3750	5250	6750	8250	9750

Based on research of national averages

# HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX

## Standard Schedule

HUSM 13i for Section 8 Housing Choice Voucher Program

January 15, 2026

<b>Single-Family Detached House - Total Monthly Consumptions</b>							
<b>Utility or Service</b>	<b>Units</b>	<b>0BR</b>	<b>1BR</b>	<b>2BR</b>	<b>3BR</b>	<b>4BR</b>	<b>5BR</b>
Heating with Natural Gas	therms	18	21	23	25	27	29
Heating with Electric Resistance	kWh	159	187	211	236	260	285
Cooking with Natural Gas	therms	3	3	5	6	8	9
Cooking with Electricity	kWh	41	48	70	91	113	134
Other Electric	kWh	227	267	371	476	580	685
Air Conditioning	kWh	97	114	256	398	540	682
Water Heating with Natural Gas	therms	7	9	13	17	20	24
Water Heating with Electricity	kWh	116	137	175	212	250	288

### Developed by ResidentLife Utility Allowances®

Water	gal	3600	3750	5250	6750	8250	9750
Sewer	gal	3600	3750	5250	6750	8250	9750

Based on research of national averages

# HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX

## Standard Schedule

HUSM 13i for Section 8 Housing Choice Voucher Program

January 15, 2026

<b>Mobile/Manufactured Home - Total Monthly Consumptions</b>							
<b>Utility or Service</b>	<b>Units</b>	<b>0BR</b>	<b>1BR</b>	<b>2BR</b>	<b>3BR</b>	<b>4BR</b>	<b>5BR</b>
Heating with Natural Gas	therms	15	18	19	21	23	25
Heating with Electric Resistance	kWh	174	204	209	214	219	223
Cooking with Natural Gas	therms	3	3	5	6	8	9
Cooking with Electricity	kWh	41	48	70	91	113	134
Other Electric	kWh	227	267	371	476	580	685
Air Conditioning	kWh	118	139	237	335	433	532
Water Heating with Natural Gas	therms	7	9	13	17	20	24
Water Heating with Electricity	kWh	116	137	175	212	250	288

### Developed by ResidentLife Utility Allowances®

Water	gal	3600	3750	5250	6750	8250	9750
Sewer	gal	3600	3750	5250	6750	8250	9750

Based on research of national averages

# HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX

## Energy Efficient Schedule

HUSM 13i for Section 8 Housing Choice Voucher Program

January 15, 2026

<b>Apartment - Total Monthly Consumptions</b>							
<b>Utility or Service</b>	<b>Units</b>	<b>0BR</b>	<b>1BR</b>	<b>2BR</b>	<b>3BR</b>	<b>4BR</b>	<b>5BR</b>
Heating with Natural Gas	therms	10	12	13	14	15	17
Heating with Electric Resistance	kWh	65	77	94	112	130	148
Cooking with Natural Gas	therms	2	3	4	5	6	8
Cooking with Electricity	kWh	34	39	57	75	92	110
Other Electric	kWh	127	149	207	265	324	382
Air Conditioning	kWh	102	121	167	214	260	307
Water Heating with Natural Gas	therms	5	6	8	11	13	16
Water Heating with Electricity	kWh	76	90	114	139	164	189

### Developed by ResidentLife Utility Allowances®

Water	gal	3000	3720	5160	6600	8040	9480
Sewer	gal	3000	3720	5160	6600	8040	9480

Based on research of national averages (with water saving appliances)

**UTILITY ALLOWANCE  
COST OF CONSUMPTION  
CALCULATIONS**

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**Section 8 HCV Program (Community-Wide)**

**UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS**  
**Standard Schedule**

**ELECTRICITY - Austin Energy**

**UPDATE 2025**

**Building Type: Apartment**

**A Monthly Charge of \$16.50 is included in the  
 'Other Electric, Lighting, Refrigeration, Etc' calculations.**

**HEATING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Winter</b>	0BR	1BR	2BR	3BR	4BR	5BR
	79	93	115	137	159	180
Total Energy Charges (0-300) per kwh 0.11165	\$8.82	\$10.38	\$12.84	\$15.30	\$17.75	\$20.10
Total Taxes % of total 3.1637%	\$0.28	\$0.33	\$0.41	\$0.48	\$0.56	\$0.64
<b>Total Monthly Average Cost</b>	<b>\$9.10</b>	<b>\$10.71</b>	<b>\$13.25</b>	<b>\$15.78</b>	<b>\$18.31</b>	<b>\$20.74</b>

**AIR CONDITIONING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Summer</b>	0BR	1BR	2BR	3BR	4BR	5BR
	125	147	204	261	317	374
Total Energy Charges (0-300) per kwh 0.11165	\$13.96	\$16.41	\$22.78	\$29.14	\$33.50	\$33.50
Total Energy Charges (301-900) per kwh 0.11663					\$1.98	\$8.63
<i>Subtotal</i>	\$13.96	\$16.41	\$22.78	\$29.14	\$35.48	\$42.13
Total Taxes % of total 3.1637%	\$0.44	\$0.52	\$0.72	\$0.92	\$1.12	\$1.33
<b>Total Monthly Average Cost</b>	<b>\$14.40</b>	<b>\$16.93</b>	<b>\$23.50</b>	<b>\$30.06</b>	<b>\$36.60</b>	<b>\$43.46</b>

**COOKING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	41	48	70	91	113	134
Total Energy Charges (0-300) per kwh 0.11163	\$4.58	\$5.36	\$7.81	\$10.16	\$12.61	\$14.96
Total Taxes % of total 3.1637%	\$0.14	\$0.17	\$0.25	\$0.32	\$0.40	\$0.47
<b>Total Monthly Average Cost</b>	<b>\$4.72</b>	<b>\$5.53</b>	<b>\$8.06</b>	<b>\$10.48</b>	<b>\$13.01</b>	<b>\$15.43</b>

**OTHER ELECTRIC LIGHTING, REFRIGERATION, ETC.**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	154	182	253	324	395	466
Customer Charge per month \$16.50	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50
Total Energy Charges (0-300) per kwh 0.11163	\$17.19	\$20.32	\$28.24	\$33.49	\$33.49	\$33.49
Total Energy Charges (301-900) per kwh 0.11663				\$2.80	\$11.08	\$19.36
<b>Subtotal</b>	<b>\$33.69</b>	<b>\$36.82</b>	<b>\$44.74</b>	<b>\$52.79</b>	<b>\$61.07</b>	<b>\$69.35</b>
Total Taxes % of total 3.1637%	\$1.07	\$1.16	\$1.42	\$1.67	\$1.93	\$2.19
<b>Total Monthly Average Cost</b>	<b>\$34.76</b>	<b>\$37.98</b>	<b>\$46.16</b>	<b>\$54.46</b>	<b>\$63.00</b>	<b>\$71.54</b>

**WATER HEATING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	93	109	140	170	200	230
Total Energy Charges (0-300) per kwh 0.11163	\$10.38	\$12.17	\$15.63	\$18.98	\$22.33	\$25.67
Total Taxes % of total 3.1637%	\$0.33	\$0.39	\$0.49	\$0.60	\$0.71	\$0.81
<b>Total Monthly Average Cost</b>	<b>\$10.71</b>	<b>\$12.56</b>	<b>\$16.12</b>	<b>\$19.58</b>	<b>\$23.04</b>	<b>\$26.48</b>

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**Section 8 HCV Program (Community-Wide)**

**UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS**  
**Standard Schedule**

**ELECTRICITY - Austin Energy**

**UPDATE 2025**

**Building Type: Row House/Townhouse/Semi-Detached/Duplex**

A Monthly Charge of \$16.50 is included in the  
 'Other Electric, Lighting, Refrigeration, Etc' calculations.

**HEATING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Winter</b>	0BR	1BR	2BR	3BR	4BR	5BR
	117	138	165	192	218	245
Total Energy Charges (0-300) per kwh 0.11165	\$13.06	\$15.41	\$18.42	\$21.44	\$24.34	\$27.35
Total Taxes % of total 3.1637%	\$0.41	\$0.49	\$0.58	\$0.68	\$0.77	\$0.87
<b>Total Monthly Average Cost</b>	<b>\$13.47</b>	<b>\$15.90</b>	<b>\$19.00</b>	<b>\$22.12</b>	<b>\$25.11</b>	<b>\$28.22</b>

**AIR CONDITIONING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Summer</b>	0BR	1BR	2BR	3BR	4BR	5BR
	123	145	248	352	455	558
Total Energy Charges (0-300) per kwh 0.11165	\$13.73	\$16.19	\$27.69	\$33.50	\$33.50	\$33.50
Total Energy Charges (301-900) per kwh 0.11663				\$6.06	\$18.08	\$30.09
<i>Subtotal</i>	\$13.73	\$16.19	\$27.69	\$39.56	\$51.58	\$63.59
Total Taxes % of total 3.1637%	\$0.43	\$0.51	\$0.88	\$1.25	\$1.63	\$2.01
<b>Total Monthly Average Cost</b>	<b>\$14.16</b>	<b>\$16.70</b>	<b>\$28.57</b>	<b>\$40.81</b>	<b>\$53.21</b>	<b>\$65.60</b>

**COOKING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	41	48	70	91	113	134
Total Energy Charges (0-300) per kwh 0.11163	\$4.58	\$5.36	\$7.81	\$10.16	\$12.61	\$14.96
Total Taxes % of total 3.1637%	\$0.14	\$0.17	\$0.25	\$0.32	\$0.40	\$0.47
<b>Total Monthly Average Cost</b>	<b>\$4.72</b>	<b>\$5.53</b>	<b>\$8.06</b>	<b>\$10.48</b>	<b>\$13.01</b>	<b>\$15.43</b>

**OTHER ELECTRIC LIGHTING, REFRIGERATION, ETC.**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	195	230	319	409	499	589
Customer Charge per month \$16.50	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50
Total Energy Charges (0-300) per kwh 0.11163	\$21.77	\$25.67	\$33.49	\$33.49	\$33.49	\$33.49
Total Energy Charges (301-900) per kwh 0.11663			\$2.22	\$12.71	\$23.21	\$33.71
<b>Subtotal</b>	<b>\$38.27</b>	<b>\$42.17</b>	<b>\$52.21</b>	<b>\$62.70</b>	<b>\$73.20</b>	<b>\$83.70</b>
Total Taxes % of total 3.1637%	\$1.21	\$1.33	\$1.65	\$1.98	\$2.32	\$2.65
<b>Total Monthly Average Cost</b>	<b>\$39.48</b>	<b>\$43.50</b>	<b>\$53.86</b>	<b>\$64.68</b>	<b>\$75.52</b>	<b>\$86.35</b>

**WATER HEATING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	116	137	175	212	250	288
Total Energy Charges (0-300) per kwh 0.11163	\$12.95	\$15.29	\$19.54	\$23.67	\$27.91	\$32.15
Total Taxes % of total 3.1637%	\$0.41	\$0.48	\$0.62	\$0.75	\$0.88	\$1.02
<b>Total Monthly Average Cost</b>	<b>\$13.36</b>	<b>\$15.77</b>	<b>\$20.16</b>	<b>\$24.42</b>	<b>\$28.79</b>	<b>\$33.17</b>

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**Section 8 HCV Program (Community-Wide)**

**UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS**  
**Standard Schedule**

**ELECTRICITY - Austin Energy**

**UPDATE 2025**

**Building Type: Detached House**

A Monthly Charge of \$16.50 is included in the  
 'Other Electric, Lighting, Refrigeration, Etc' calculations.

**HEATING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Winter</b>	0BR	1BR	2BR	3BR	4BR	5BR
	159	187	211	236	260	285
Total Energy Charges (0-300) per kwh 0.11165	\$17.75	\$20.88	\$23.56	\$26.35	\$29.03	\$31.82
Total Taxes % of total 3.1637%	\$0.56	\$0.66	\$0.75	\$0.83	\$0.92	\$1.01
<b>Total Monthly Average Cost</b>	<b>\$18.31</b>	<b>\$21.54</b>	<b>\$24.31</b>	<b>\$27.18</b>	<b>\$29.95</b>	<b>\$32.83</b>

**AIR CONDITIONING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Summer</b>	0BR	1BR	2BR	3BR	4BR	5BR
	97	114	256	398	540	682
Total Energy Charges (0-300) per kwh 0.11165	\$10.83	\$12.73	\$28.58	\$33.50	\$33.50	\$33.50
Total Energy Charges (301-900) per kwh 0.11663				\$11.43	\$27.99	\$44.55
<i>Subtotal</i>	<i>\$10.83</i>	<i>\$12.73</i>	<i>\$28.58</i>	<i>\$44.93</i>	<i>\$61.49</i>	<i>\$78.05</i>
Total Taxes % of total 3.1637%	\$0.34	\$0.40	\$0.90	\$1.42	\$1.95	\$2.47
<b>Total Monthly Average Cost</b>	<b>\$11.17</b>	<b>\$13.13</b>	<b>\$29.48</b>	<b>\$46.35</b>	<b>\$63.44</b>	<b>\$80.52</b>

**COOKING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	41	48	70	91	113	134
Total Energy Charges (0-300) per kwh 0.11163	\$4.58	\$5.36	\$7.81	\$10.16	\$12.61	\$14.96
Total Taxes % of total 3.1637%	\$0.14	\$0.17	\$0.25	\$0.32	\$0.40	\$0.47
<b>Total Monthly Average Cost</b>	<b>\$4.72</b>	<b>\$5.53</b>	<b>\$8.06</b>	<b>\$10.48</b>	<b>\$13.01</b>	<b>\$15.43</b>

**OTHER ELECTRIC LIGHTING, REFRIGERATION, ETC.**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	227	267	371	476	580	685
Customer Charge per month \$16.50	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50
Total Energy Charges (0-300) per kwh 0.11163	\$25.34	\$29.81	\$33.49	\$33.49	\$33.49	\$33.49
Total Energy Charges (301-900) per kwh 0.11663			\$8.28	\$20.53	\$32.66	\$44.90
<b>Subtotal</b>	<b>\$41.84</b>	<b>\$46.31</b>	<b>\$58.27</b>	<b>\$70.52</b>	<b>\$82.65</b>	<b>\$94.89</b>
Total Taxes % of total 3.1637%	\$1.32	\$1.47	\$1.84	\$2.23	\$2.61	\$3.00
<b>Total Monthly Average Cost</b>	<b>\$43.16</b>	<b>\$47.78</b>	<b>\$60.11</b>	<b>\$72.75</b>	<b>\$85.26</b>	<b>\$97.89</b>

**WATER HEATING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	116	137	175	212	250	288
Total Energy Charges (0-300) per kwh 0.11163	\$12.95	\$15.29	\$19.54	\$23.67	\$27.91	\$32.15
Total Taxes % of total 3.1637%	\$0.41	\$0.48	\$0.62	\$0.75	\$0.88	\$1.02
<b>Total Monthly Average Cost</b>	<b>\$13.36</b>	<b>\$15.77</b>	<b>\$20.16</b>	<b>\$24.42</b>	<b>\$28.79</b>	<b>\$33.17</b>

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**Section 8 HCV Program (Community-Wide)**

**UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS**  
**Standard Schedule**

**ELECTRICITY - Austin Energy**

**UPDATE 2025**

**Building Type: Mobile Home**

A Monthly Charge of \$16.50 is included in the  
 'Other Electric, Lighting, Refrigeration, Etc' calculations.

**HEATING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Winter</b>	0BR	1BR	2BR	3BR	4BR	5BR
	174	204	209	214	219	223
Total Energy Charges (0-300) per kwh 0.11165	\$19.43	\$22.78	\$23.33	\$23.89	\$24.45	\$24.90
Total Taxes % of total 3.1637%	\$0.61	\$0.72	\$0.74	\$0.76	\$0.77	\$0.79
<b>Total Monthly Average Cost</b>	<b>\$20.04</b>	<b>\$23.50</b>	<b>\$24.07</b>	<b>\$24.65</b>	<b>\$25.22</b>	<b>\$25.69</b>

**AIR CONDITIONING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Summer</b>	0BR	1BR	2BR	3BR	4BR	5BR
	118	139	237	335	433	532
Total Energy Charges (0-300) per kwh 0.11165	\$13.17	\$15.52	\$26.46	\$33.50	\$33.50	\$33.50
Total Energy Charges (301-900) per kwh 0.11663				\$4.08	\$15.51	\$27.06
<i>Subtotal</i>	<i>\$13.17</i>	<i>\$15.52</i>	<i>\$26.46</i>	<i>\$37.58</i>	<i>\$49.01</i>	<i>\$60.56</i>
Total Taxes % of total 3.1637%	\$0.42	\$0.49	\$0.84	\$1.19	\$1.55	\$1.92
<b>Total Monthly Average Cost</b>	<b>\$13.59</b>	<b>\$16.01</b>	<b>\$27.30</b>	<b>\$38.77</b>	<b>\$50.56</b>	<b>\$62.48</b>

**COOKING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	41	48	70	91	113	134
Total Energy Charges (0-300) per kwh 0.11163	\$4.58	\$5.36	\$7.81	\$10.16	\$12.61	\$14.96
Total Taxes % of total 3.1637%	\$0.14	\$0.17	\$0.25	\$0.32	\$0.40	\$0.47
<b>Total Monthly Average Cost</b>	<b>\$4.72</b>	<b>\$5.53</b>	<b>\$8.06</b>	<b>\$10.48</b>	<b>\$13.01</b>	<b>\$15.43</b>

**OTHER ELECTRIC LIGHTING, REFRIGERATION, ETC.**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	227	267	371	476	580	685
Customer Charge per month \$16.50	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50
Total Energy Charges (0-300) per kwh 0.11163	\$25.34	\$29.81	\$33.49	\$33.49	\$33.49	\$33.49
Total Energy Charges (301-900) per kwh 0.11663			\$8.28	\$20.53	\$32.66	\$44.90
<b>Subtotal</b>	<b>\$41.84</b>	<b>\$46.31</b>	<b>\$58.27</b>	<b>\$70.52</b>	<b>\$82.65</b>	<b>\$94.89</b>
Total Taxes % of total 3.1637%	\$1.32	\$1.47	\$1.84	\$2.23	\$2.61	\$3.00
<b>Total Monthly Average Cost</b>	<b>\$43.16</b>	<b>\$47.78</b>	<b>\$60.11</b>	<b>\$72.75</b>	<b>\$85.26</b>	<b>\$97.89</b>

**WATER HEATING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	116	137	175	212	250	288
Total Energy Charges (0-300) per kwh 0.11163	\$12.95	\$15.29	\$19.54	\$23.67	\$27.91	\$32.15
Total Taxes % of total 3.1637%	\$0.41	\$0.48	\$0.62	\$0.75	\$0.88	\$1.02
<b>Total Monthly Average Cost</b>	<b>\$13.36</b>	<b>\$15.77</b>	<b>\$20.16</b>	<b>\$24.42</b>	<b>\$28.79</b>	<b>\$33.17</b>

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**Section 8 HCV Program (Community-Wide)**

**UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS**  
**Standard Schedule**

**NATURAL GAS - Texas Gas Service**

**UPDATE 2025**

**Building Type: Apartment**

**Total Monthly Charges of \$21.36 plus taxes of \$1.74 are not included in these calculations.**  
**(See form HUD-52667 - Other:Specify: \$23.10)**

**HEATING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Winter</b>	0BR	1BR	2BR	3BR	4BR	5BR
	12	14	16	17	19	20
Total Energy Charges per ccf 1.76392	\$21.17	\$24.69	\$28.22	\$29.99	\$33.51	\$35.28
Total Taxes % of Total 8.1637%	\$1.73	\$2.02	\$2.30	\$2.45	\$2.74	\$2.88
<b>Total Monthly Average Cost</b>	<b>\$22.90</b>	<b>\$26.71</b>	<b>\$30.52</b>	<b>\$32.44</b>	<b>\$36.25</b>	<b>\$38.16</b>

**COOKING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	3	3	5	6	8	9
Total Energy Charges per ccf 1.76392	\$5.29	\$5.29	\$8.82	\$10.58	\$14.11	\$15.88
Total Taxes % of Total 8.1637%	\$0.43	\$0.43	\$0.72	\$0.86	\$1.15	\$1.30
<b>Total Monthly Average Cost</b>	<b>\$5.72</b>	<b>\$5.72</b>	<b>\$9.54</b>	<b>\$11.44</b>	<b>\$15.26</b>	<b>\$17.18</b>

**WATER HEATING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	6	7	10	13	16	19
Total Energy Charges per ccf 1.76392	\$10.58	\$12.35	\$17.64	\$22.93	\$28.22	\$33.51
Total Taxes % of Total 8.1637%	\$0.86	\$1.01	\$1.44	\$1.87	\$2.30	\$2.74
<b>Total Monthly Average Cost</b>	<b>\$11.44</b>	<b>\$13.36</b>	<b>\$19.08</b>	<b>\$24.80</b>	<b>\$30.52</b>	<b>\$36.25</b>

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**Section 8 HCV Program (Community-Wide)**

**UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS**  
**Standard Schedule**

**NATURAL GAS - Texas Gas Service**

**UPDATE 2025**

**Building Type: Row House/Townhouse/Semi-Detached/Duplex**

**Total Monthly Charges of \$21.36 plus taxes of \$1.74 are not included in these calculations.**  
**(See form HUD-52667 - Other:Specify: \$23.10)**

**HEATING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Winter</b>	0BR	1BR	2BR	3BR	4BR	5BR
	17	20	22	23	25	27
Total Energy Charges per ccf 1.76392	\$29.99	\$35.28	\$38.81	\$40.57	\$44.10	\$47.63
Total Taxes % of Total 8.1637%	\$2.45	\$2.88	\$3.17	\$3.31	\$3.60	\$3.89
<b>Total Monthly Average Cost</b>	<b>\$32.44</b>	<b>\$38.16</b>	<b>\$41.98</b>	<b>\$43.88</b>	<b>\$47.70</b>	<b>\$51.52</b>

**COOKING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	3	3	5	6	8	9
Total Energy Charges per ccf 1.76392	\$5.29	\$5.29	\$8.82	\$10.58	\$14.11	\$15.88
Total Taxes % of Total 8.1637%	\$0.43	\$0.43	\$0.72	\$0.86	\$1.15	\$1.30
<b>Total Monthly Average Cost</b>	<b>\$5.72</b>	<b>\$5.72</b>	<b>\$9.54</b>	<b>\$11.44</b>	<b>\$15.26</b>	<b>\$17.18</b>

**WATER HEATING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	7	9	13	17	20	24
Total Energy Charges per ccf 1.76392	\$12.35	\$15.88	\$22.93	\$29.99	\$35.28	\$42.33
Total Taxes % of Total 8.1637%	\$1.01	\$1.30	\$1.87	\$2.45	\$2.88	\$3.46
<b>Total Monthly Average Cost</b>	<b>\$13.36</b>	<b>\$17.18</b>	<b>\$24.80</b>	<b>\$32.44</b>	<b>\$38.16</b>	<b>\$45.79</b>

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**Section 8 HCV Program (Community-Wide)**

**UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS**  
**Standard Schedule**

**NATURAL GAS - Texas Gas Service**

**UPDATE 2025**

**Building Type: Detached House**

**Total Monthly Charges of \$21.36 plus taxes of \$1.74 are not included in these calculations.**  
**(See form HUD-52667 - Other:Specify: \$23.10)**

**HEATING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Winter</b>	0BR	1BR	2BR	3BR	4BR	5BR
	18	21	23	25	27	29
Total Energy Charges per ccf 1.76392	\$31.75	\$37.04	\$40.57	\$44.10	\$47.63	\$51.15
Total Taxes % of Total 8.1637%	\$2.59	\$3.02	\$3.31	\$3.60	\$3.89	\$4.18
<b>Total Monthly Average Cost</b>	<b>\$34.34</b>	<b>\$40.06</b>	<b>\$43.88</b>	<b>\$47.70</b>	<b>\$51.52</b>	<b>\$55.33</b>

**COOKING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	3	3	5	6	8	9
Total Energy Charges per ccf 1.76392	\$5.29	\$5.29	\$8.82	\$10.58	\$14.11	\$15.88
Total Taxes % of Total 8.1637%	\$0.43	\$0.43	\$0.72	\$0.86	\$1.15	\$1.30
<b>Total Monthly Average Cost</b>	<b>\$5.72</b>	<b>\$5.72</b>	<b>\$9.54</b>	<b>\$11.44</b>	<b>\$15.26</b>	<b>\$17.18</b>

**WATER HEATING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	7	9	13	17	20	24
Total Energy Charges per ccf 1.76392	\$12.35	\$15.88	\$22.93	\$29.99	\$35.28	\$42.33
Total Taxes % of Total 8.1637%	\$1.01	\$1.30	\$1.87	\$2.45	\$2.88	\$3.46
<b>Total Monthly Average Cost</b>	<b>\$13.36</b>	<b>\$17.18</b>	<b>\$24.80</b>	<b>\$32.44</b>	<b>\$38.16</b>	<b>\$45.79</b>

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**Section 8 HCV Program (Community-Wide)**

**UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS**  
**Standard Schedule**

**NATURAL GAS - Texas Gas Service**

**UPDATE 2025**

**Building Type: Mobile Home**

**Total Monthly Charges of \$21.36 plus taxes of \$1.74 are not included in these calculations.**  
**(See form HUD-52667 - Other:Specify: \$23.10)**

**HEATING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Winter</b>	0BR	1BR	2BR	3BR	4BR	5BR
	15	18	19	21	23	25
Total Energy Charges per ccf 1.76392	\$26.46	\$31.75	\$33.51	\$37.04	\$40.57	\$44.10
Total Taxes % of Total 8.1637%	\$2.16	\$2.59	\$2.74	\$3.02	\$3.31	\$3.60
<b>Total Monthly Average Cost</b>	<b>\$28.62</b>	<b>\$34.34</b>	<b>\$36.25</b>	<b>\$40.06</b>	<b>\$43.88</b>	<b>\$47.70</b>

**COOKING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	3	3	5	6	8	9
Total Energy Charges per ccf 1.76392	\$5.29	\$5.29	\$8.82	\$10.58	\$14.11	\$15.88
Total Taxes % of Total 8.1637%	\$0.43	\$0.43	\$0.72	\$0.86	\$1.15	\$1.30
<b>Total Monthly Average Cost</b>	<b>\$5.72</b>	<b>\$5.72</b>	<b>\$9.54</b>	<b>\$11.44</b>	<b>\$15.26</b>	<b>\$17.18</b>

**WATER HEATING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	7	9	13	17	20	24
Total Energy Charges per ccf 1.76392	\$12.35	\$15.88	\$22.93	\$29.99	\$35.28	\$42.33
Total Taxes % of Total 8.1637%	\$1.01	\$1.30	\$1.87	\$2.45	\$2.88	\$3.46
<b>Total Monthly Average Cost</b>	<b>\$13.36</b>	<b>\$17.18</b>	<b>\$24.80</b>	<b>\$32.44</b>	<b>\$38.16</b>	<b>\$45.79</b>

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**Section 8 HCV Program (Community-Wide)**

**UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS**  
**Energy Efficient Schedule**

**ELECTRICITY - Austin Energy**

**UPDATE 2025**

**Building Type: Apartment**

A Monthly Charge of \$16.50 is included in the  
 'Other Electric, Lighting, Refrigeration, Etc' calculations.

**HEATING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Winter</b>	0BR	1BR	2BR	3BR	4BR	5BR
	65	77	94	112	130	148
Total Energy Charges (0-300) per kwh 0.11165	\$7.26	\$8.60	\$10.50	\$12.50	\$14.51	\$16.52
Total Taxes % of total 3.1637%	\$0.23	\$0.27	\$0.33	\$0.40	\$0.46	\$0.52
<b>Total Monthly Average Cost</b>	<b>\$7.49</b>	<b>\$8.87</b>	<b>\$10.83</b>	<b>\$12.90</b>	<b>\$14.97</b>	<b>\$17.04</b>

**AIR CONDITIONING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Summer</b>	0BR	1BR	2BR	3BR	4BR	5BR
	102	121	167	214	260	307
Total Energy Charges (0-300) per kwh 0.11165	\$11.39	\$13.51	\$18.65	\$23.89	\$29.03	\$33.50
Total Energy Charges (301-900) per kwh 0.11663						\$0.82
<i>Subtotal</i>	\$11.39	\$13.51	\$18.65	\$23.89	\$29.03	\$34.32
Total Taxes % of total 3.1637%	\$0.36	\$0.43	\$0.59	\$0.76	\$0.92	\$1.09
<b>Total Monthly Average Cost</b>	<b>\$11.75</b>	<b>\$13.94</b>	<b>\$19.24</b>	<b>\$24.65</b>	<b>\$29.95</b>	<b>\$35.41</b>

**COOKING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	34	39	57	75	92	110
Total Energy Charges (0-300) per kwh 0.11165	\$3.80	\$4.35	\$6.36	\$8.37	\$10.27	\$12.28
Total Taxes % of total 3.1637%	\$0.12	\$0.14	\$0.20	\$0.26	\$0.32	\$0.39
<b>Total Monthly Average Cost</b>	<b>\$3.92</b>	<b>\$4.49</b>	<b>\$6.56</b>	<b>\$8.63</b>	<b>\$10.59</b>	<b>\$12.67</b>

**OTHER ELECTRIC LIGHTING, REFRIGERATION, ETC.**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	127	149	207	265	324	382
Customer Charge per month \$16.50	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50	\$16.50
Total Energy Charges (0-300) per kwh 0.11165	\$14.18	\$16.64	\$23.11	\$29.59	\$33.50	\$33.50
Total Energy Charges (301-900) per kwh 0.11663					\$2.80	\$9.56
<b>Subtotal</b>	<b>\$30.68</b>	<b>\$33.14</b>	<b>\$39.61</b>	<b>\$46.09</b>	<b>\$52.80</b>	<b>\$59.56</b>
Total Taxes % of total 3.1637%	\$0.97	\$1.05	\$1.25	\$1.46	\$1.67	\$1.88
<b>Total Monthly Average Cost</b>	<b>\$31.65</b>	<b>\$34.19</b>	<b>\$40.86</b>	<b>\$47.55</b>	<b>\$54.47</b>	<b>\$61.44</b>

**WATER HEATING**

Monthly Average Unit Consumption KWH for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	76	90	114	139	164	189
Total Energy Charges (0-300) per kwh 0.11165	\$8.49	\$10.05	\$12.73	\$15.52	\$18.31	\$21.10
Total Taxes % of total 3.1637%	\$0.27	\$0.32	\$0.40	\$0.49	\$0.58	\$0.67
<b>Total Monthly Average Cost</b>	<b>\$8.76</b>	<b>\$10.37</b>	<b>\$13.13</b>	<b>\$16.01</b>	<b>\$18.89</b>	<b>\$21.77</b>

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**Section 8 HCV Program (Community-Wide)**

**UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS**  
**Energy Efficient Schedule**

**NATURAL GAS - Texas Gas Service**

**UPDATE 2025**

**Building Type: Apartment**

**Total Monthly Charges of \$21.36 plus taxes of \$1.74 are not included in these calculations.**  
**(See form HUD-52667 - Other:Specify: \$23.10)**

**HEATING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Winter</b>	0BR	1BR	2BR	3BR	4BR	5BR
	10	12	13	14	15	17
Total Energy Charges per ccf 1.76392	\$17.64	\$21.17	\$22.93	\$24.69	\$26.46	\$29.99
Total Taxes % of Total 8.1637%	\$1.44	\$1.73	\$1.87	\$2.02	\$2.16	\$2.45
<b>Total Monthly Average Cost</b>	<b>\$19.08</b>	<b>\$22.90</b>	<b>\$24.80</b>	<b>\$26.71</b>	<b>\$28.62</b>	<b>\$32.44</b>

**COOKING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	2	3	4	5	6	8
Total Energy Charges per ccf 1.76392	\$3.53	\$5.29	\$7.06	\$8.82	\$10.58	\$14.11
Total Taxes % of Total 8.1637%	\$0.29	\$0.43	\$0.58	\$0.72	\$0.86	\$1.15
<b>Total Monthly Average Cost</b>	<b>\$3.82</b>	<b>\$5.72</b>	<b>\$7.64</b>	<b>\$9.54</b>	<b>\$11.44</b>	<b>\$15.26</b>

**WATER HEATING**

Monthly Average Unit Consumption ccf for all bedroom types - <b>Year Round</b>	0BR	1BR	2BR	3BR	4BR	5BR
	5	6	8	11	13	16
Total Energy Charges per ccf 1.76392	\$8.82	\$10.58	\$14.11	\$19.40	\$22.93	\$28.22
Total Taxes % of Total 8.1637%	\$0.72	\$0.86	\$1.15	\$1.58	\$1.87	\$2.30
<b>Total Monthly Average Cost</b>	<b>\$9.54</b>	<b>\$11.44</b>	<b>\$15.26</b>	<b>\$20.98</b>	<b>\$24.80</b>	<b>\$30.52</b>

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**Section 8 HCV Program (Community-Wide)**

**UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS**  
**Standard Schedule**

**WATER, SEWER, & TRASH COLLECTION - Austin Water**

**UPDATE 2025**

**Building Type: Multi-Family**

**WATER**

Monthly Average Unit	0BR	1BR	2BR	3BR	4BR	5BR
Consumption gallons for all bedroom types	3600	3750	5250	6750	8250	9750
Total Monthly Charges per month \$20.72	\$20.72	\$20.72	\$20.72	\$20.72	\$20.72	\$20.72
Total Usage Charges per 1000 gallons \$5.61	\$20.20	\$21.04	\$29.45	\$37.87	\$46.28	\$54.70
<b>Total Monthly Average Cost</b>	<b>\$40.92</b>	<b>\$41.76</b>	<b>\$50.17</b>	<b>\$58.59</b>	<b>\$67.00</b>	<b>\$75.42</b>

**SEWER**

Monthly Average Unit	0BR	1BR	2BR	3BR	4BR	5BR
Consumption gallons for all bedroom types	3600	3750	5250	6750	8250	9750
Total Monthly Charges per month \$49.83	\$49.83	\$49.83	\$49.83	\$49.83	\$49.83	\$49.83
Total Usage Charges per 1000 gallons \$11.16	\$40.18	\$41.85	\$58.59	\$75.33	\$92.07	\$108.81
<b>Total Monthly Average Cost</b>	<b>\$90.01</b>	<b>\$91.68</b>	<b>\$108.42</b>	<b>\$125.16</b>	<b>\$141.90</b>	<b>\$158.64</b>

**TRASH COLLECTION**

Monthly Average Unit	0BR	1BR	2BR	3BR	4BR	5BR
Consumption gallons for all bedroom types	1	1	1	1	1	1
Total Monthly Charges (24 gal) per month \$33.95	\$33.95	\$33.95	\$33.95			
Total Monthly Charges (32 gal) per month \$35.50				\$35.50	\$35.50	
Total Monthly Charges (64 gal) per month \$41.75						\$41.75
Sales Tax % of total 8.25%	\$2.80	\$2.80	\$2.80	\$2.93	\$2.93	\$3.44
<b>Total Monthly Charges</b>	<b>\$36.75</b>	<b>\$36.75</b>	<b>\$36.75</b>	<b>\$38.43</b>	<b>\$38.43</b>	<b>\$45.19</b>

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**Section 8 HCV Program (Community-Wide)**

**UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS**  
**Standard Schedule**

**WATER, SEWER, & TRASH COLLECTION - Austin Water**

**UPDATE 2025**

**Building Type: Single-Family**

**WATER**

Monthly Average Unit Consumption gallons for all bedroom types	0BR	1BR	2BR	3BR	4BR	5BR
	3600	3750	5250	6750	8250	9750
Total Monthly Charges (if 2001-6000) per month \$11.66	\$11.66	\$11.66	\$11.66			
Total Monthly Charges (if 6001-11000) per month \$18.18				\$18.18	\$18.18	\$18.18
Total Usage Charges (0-2000) per 1000 gallons \$3.77	\$7.54	\$7.54	\$7.54	\$7.54	\$7.54	\$7.54
Total Usage Charges (2001-6000) per 1000 gallons \$6.07	\$9.71	\$10.62	\$19.73	\$24.28	\$24.28	\$24.28
Total Usage Charges (6001-11000) per 1000 gallons \$10.76				\$8.07	\$24.21	\$40.35
<b>Total Monthly Average Cost</b>	<b>\$28.91</b>	<b>\$29.82</b>	<b>\$38.93</b>	<b>\$58.07</b>	<b>\$74.21</b>	<b>\$90.35</b>

**SEWER**

Monthly Average Unit Consumption gallons for all bedroom types	0BR	1BR	2BR	3BR	4BR	5BR
	3600	3750	5250	6750	8250	9750
Total Monthly Charges (House) per month \$49.76	\$49.76	\$49.76	\$49.76	\$49.76	\$49.76	\$49.76
Total Usage Charges (0-2000) per 1000 gallons \$6.75	\$13.50	\$13.50	\$13.50	\$13.50	\$13.50	\$13.50
Total Usage Charges (over 2000) per 1000 gallons \$13.85	\$22.16	\$24.24	\$45.01	\$65.79	\$86.56	\$107.34
<b>Total Monthly Average Cost</b>	<b>\$85.42</b>	<b>\$87.50</b>	<b>\$108.27</b>	<b>\$129.05</b>	<b>\$149.82</b>	<b>\$170.60</b>

**TRASH COLLECTION**

Monthly Average Unit Consumption gallons for all bedroom types	0BR	1BR	2BR	3BR	4BR	5BR
	1	1	1	1	1	1
Total Monthly Charges (24 gal) per month \$33.95	\$33.95	\$33.95	\$33.95			
Total Monthly Charges (32 gal) per month \$35.50				\$35.50	\$35.50	
Total Monthly Charges (64 gal) per month \$41.75						\$41.75
Sales Tax % of total 8.25%	\$2.80	\$2.80	\$2.80	\$2.93	\$2.93	\$3.44
<b>Total Monthly Charges</b>	<b>\$36.75</b>	<b>\$36.75</b>	<b>\$36.75</b>	<b>\$38.43</b>	<b>\$38.43</b>	<b>\$45.19</b>

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**Section 8 HCV Program (Community-Wide)**

**UTILITY ALLOWANCE COST OF CONSUMPTION CALCULATIONS**  
**Energy Efficient Schedule**

**WATER, SEWER, & TRASH COLLECTION - Austin Water**

**UPDATE 2025**

**Building Type: Multi-Family**

**WATER**

Monthly Average Unit	0BR	1BR	2BR	3BR	4BR	5BR
Consumption gallons for all bedroom types	3000	3720	5160	6600	8040	9480
Total Monthly Charges per month \$20.72	\$20.72	\$20.72	\$20.72	\$20.72	\$20.72	\$20.72
Total Usage Charges per 1000 gallons \$5.61	\$16.83	\$20.87	\$28.95	\$37.03	\$45.10	\$53.18
<b>Total Monthly Average Cost</b>	<b>\$37.55</b>	<b>\$41.59</b>	<b>\$49.67</b>	<b>\$57.75</b>	<b>\$65.82</b>	<b>\$73.90</b>

**SEWER**

Monthly Average Unit	0BR	1BR	2BR	3BR	4BR	5BR
Consumption gallons for all bedroom types	3000	3720	5160	6600	8040	9480
Total Monthly Charges per month \$49.83	\$49.83	\$49.83	\$49.83	\$49.83	\$49.83	\$49.83
Total Usage Charges per 1000 gallons \$11.16	\$33.48	\$41.52	\$57.59	\$73.66	\$89.73	\$105.80
<b>Total Monthly Average Cost</b>	<b>\$83.31</b>	<b>\$91.35</b>	<b>\$107.42</b>	<b>\$123.49</b>	<b>\$139.56</b>	<b>\$155.63</b>

**TRASH COLLECTION**

Monthly Average Unit	0BR	1BR	2BR	3BR	4BR	5BR
Consumption gallons for all bedroom types	1	1	1	1	1	1
Total Monthly Charges (24 gal) per month \$33.95	\$33.95	\$33.95	\$33.95			
Total Monthly Charges (32 gal) per month \$35.50				\$35.50	\$35.50	
Total Monthly Charges (64 gal) per month \$41.75						\$41.75
Sales Tax % of total 8.25%	\$2.80	\$2.80	\$2.80	\$2.93	\$2.93	\$3.44
<b>Total Monthly Charges</b>	<b>\$36.75</b>	<b>\$36.75</b>	<b>\$36.75</b>	<b>\$38.43</b>	<b>\$38.43</b>	<b>\$45.19</b>

# SUPPORT DOCUMENTATION

## **UTILITY PROVIDER RATES AND CHARGES**

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**SECTION 8 HCV PROGRAM & ENERGY EFFICIENT**

**Utility Providers Residential Rates and Charges**  
**As of December 2025**

**ELECTRICITY**

**UPDATE 2025**

**Source: Austin Energy**

512-494-9400

austinenergy.com\*

<b>Year Round</b>				
<b>Customer Charge</b>	Per Month	<b>\$16.50</b>		
	<b>Tiers*</b>	<b>0-300</b>	<b>301-900</b>	<b>901-2000</b>
Energy Charge*	Per KWH	0.0464	0.05138	0.07525
Power Supply Adjustment	Per KWH	0.04118	0.04118	0.04118
PSA Administrative Adjustment	Per KWH	-0.00206	-0.00206	-0.00206
Regulatory Charge	Per KWH	0.01338	0.01338	0.01338
Community Benefit Charge	Per KWH	0.01275	0.01275	0.01275
<b>Total Energy Charges</b>	Per KWH	<b>0.11165</b>	<b>0.11663</b>	<b>0.1405</b>
Public Utility Gross Receipts Tax	% of Total	0.1667%		
Misc Gross Receipts Tax (pop > 10000)	% of Total	1.997%		
Local Tax Rate	% of Total	1%		
<b>Total Taxes</b>	% of Total	<b>3.1637%</b>		

**NATURAL GAS**

**Source: Texas Gas Service**

830-875-2133

texasgasservice.com\*

<b>Year Round</b>		<b>Central-Gulf Texas Service Area (RS 10)</b>	
<b>Total Customer Charge</b>	Per Month	<b>\$21.36</b>	
	<b>Tiers</b>	<b>All</b>	
Commodity Charge	Per CCF	0.87646	
Cost of Gas (COG)	Per CCF	0.88736	
Pipeline Integrity Testing (PIT) Surcharge	Per CCF	0.0001	
<b>Total Energy Charges</b>	Per CCF	<b>1.76392</b>	
Public Utility Gross Receipts Tax	% of Total	0.1667%	
Misc Gross Receipts Tax (pop > 10000)	% of Total	1.997%	
Local Tax Rate	% of Total	1%	
Franchise Fee	% of Total	5%	
<b>Total Taxes</b>	% of Total	<b>8.1637%</b>	

*Continue...*

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**SECTION 8 HCV PROGRAM & ENERGY EFFICIENT**

**WATER, SEWER, AND TRASH COLLECTION**

Source: Austin Water

512-494-9400

austintexas.gov\*

<b>Water</b>		<i>Multi-Family</i>		
Water Meter Equivalent Charge	Per Month	\$7.75		
Water Minimum Charge	Per Month	\$12.97		
<b>Total Monthly Charges</b>	Per Month	<b>\$20.72</b>		
<i>Volume Unit Charge Peak (Jul-Oct) (4)</i>	Per 1000 Gallons	\$5.60		
<i>Volume Unit Charge Off Peak (Nov-Jun) (8)</i>	Per 1000 Gallons	\$4.86		
Volume Charge (year round wtd avg)	Per 1000 Gallons	\$5.11		
Reserve Fund Surcharge	Per 1000 Gallons	\$0.05		
Community Benefit Charge	Per 1000 Gallons	\$0.30		
GoPurple Community Benefit Charge	Per 1000 Gallons	\$0.15		
<b>Total Usage Charges</b>	Per 1000 Gallons	<b>\$5.61</b>		
<b>Sewer</b>				
Wastewater Minimum Charge	Per Month	\$11.26		
Transportation User Fee (avg)	Per Month	\$17.99		
Drainage Charge* (avg)	Per Month	\$20.59		
<b>Total Monthly Charges</b>	Per Month	<b>\$49.83</b>		
Wastewater Volume Charge	Per 1000 Gallons	\$10.71		
Community Benefit Charge	Per 1000 Gallons	\$0.30		
GoPurple Community Benefit Charge	Per 1000 Gallons	\$0.15		
<b>Total Usage Charges</b>	Per 1000 Gallons	<b>\$11.16</b>		
<b>Water</b>		<i>Single Family</i>		
	<b>Tiers*</b>	<b>if 2001-6000</b>	<b>if 6001-11000</b>	
Water Meter Equivalent Charge	Per Month	\$7.75	\$7.75	
Water Fixed Charge*	Per Month	\$3.91	\$10.43	
<b>Total Monthly Charges</b>	Per Month	<b>\$11.66</b>	<b>\$18.18</b>	
	<b>Tiers*</b>	<b>0-2000</b>	<b>2001-6000</b>	<b>6001-11000</b>
Water Volume Charge*	Per 1000 Gallons	\$3.27	\$5.57	\$10.26
Reserve Fund Surcharge	Per 1000 Gallons	\$0.05	\$0.05	\$0.05
Community Benefit Charge	Per 1000 Gallons	\$0.30	\$0.30	\$0.30
GoPurple Community Benefit Charge	Per 1000 Gallons	\$0.15	\$0.15	\$0.15
<b>Total Usage Charges</b>	Per 1000 Gallons	<b>\$3.77</b>	<b>\$6.07</b>	<b>\$10.76</b>
<b>Sewer</b>				
Wastewater Minimum Charge	Per Month	\$11.26		
Transportation Fee (avg)	Per Month	\$17.92		
Drainage Charge* (avg)	Per Month	\$20.59		
<b>Total Monthly Charges (House)</b>	Per Month	<b>\$49.76</b>		
	<b>Tiers*</b>	<b>0-2000</b>	<b>over 2000</b>	
Wastewater Volume Charge*	Per 1000 Gallons	\$6.30	\$13.40	
Community Benefit Charge	Per 1000 Gallons	\$0.30	\$0.30	
GoPurple Community Benefit Charge	Per 1000 Gallons	\$0.15	\$0.15	
<b>Total Usage Charges</b>	Per 1000 Gallons	<b>\$6.75</b>	<b>\$13.85</b>	

\*based on the avg of 1500-2500 sq footage of impervious cover

Continue...

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**  
**SECTION 8 HCV PROGRAM & ENERGY EFFICIENT**

*Austin Water Continued...*

<b>Trash Collection</b>		<i>MF/SF</i>		
	<b>Tiers*</b>	<b>24 gal (0-2 br)</b>	<b>32 gal (3-4 br)</b>	<b>64 gal (5 br)</b>
Trash Collection Charge*	Per Month	\$28.50	\$30.05	\$36.30
Clean Community Fee	Per Month	\$5.45	\$5.45	\$5.45
<b>Total Monthly Charges</b>	Per Month	<b>\$33.95</b>	<b>\$35.50</b>	<b>\$41.75</b>
<b>Sales Tax</b>	% of Total	<b>8.25%</b>		

# UTILITY PROVIDER DOCUMENTATION

**Texas Taxes**  
**Public Utility Gross Receipts Assessment**

# Public Utility Gross Receipts Assessment

A fee is imposed on each public utility within the jurisdiction of the Public Utility Commission.

## Rate Details and Other Information

### Rates

#### Public Utility Gross Receipts Tax:

1/6 of 1% (.001667) of gross receipts from rates charged to the ultimate customers in Texas.

Percentage of gross receipts from business done in incorporated cities and towns, according to population:

#### Miscellaneous Gross Receipts Tax

- 1,000 to 2,499 = .581% (.00581)
- 2,500 to 9,999 = 1.07% (.0107)
- 10,000 or more = 1.997% (.01997)

Listing of Cities with sales tax for electricity and natural gas -  
[http://www.window.state.tx.us/taxinfo/utility/gas\\_elec.html](http://www.window.state.tx.us/taxinfo/utility/gas_elec.html)

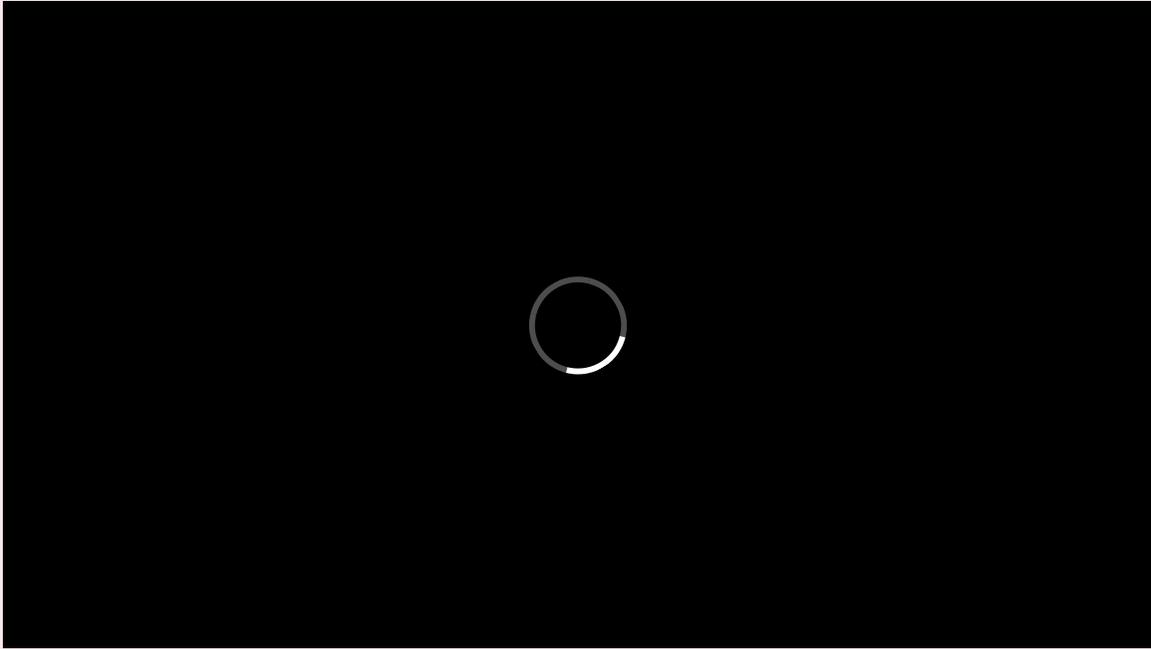
For individual city rates – [www.window.state.tx.us/taxinfo/local/city.html](http://www.window.state.tx.us/taxinfo/local/city.html)

<http://www.window.state.tx.us/taxinfo/audit/utility/ch3.htm#nontaxableutil>

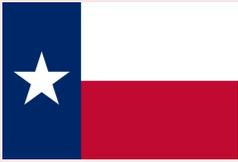
## Nontaxable Utilities

The following types of utilities are exempt from taxation under the Miscellaneous Gross Receipts Tax:

- A plant or utility used for distribution but who does not make retail sales to the ultimate consumer within an incorporated city or town in this state. (*Tax Code, Sec. 182.021*)
- **Municipal utilities:**  
Any utility owned and operated by any city or town, county, water improvement district or conservation district. (*Tax Code, Sec. 182.026*)
- **Co-ops:**  
A utility organized under the "Electric Cooperative Corporation Act" is exempt. (*Miscellaneous Tax Rule. 3.52*)



US Cities > Texas > Austin



# Austin

County: [Travis County](#)

County Seat: Yes

Area (mi<sup>2</sup>): 326.365

State: [Texas](#)

Austin is a city located in [Travis County, Texas](#). Austin has a 2025 population of **1,000,511** . It is also the county seat of [Travis County](#) . Austin is currently growing at a rate of **0.7%** annually and its population has increased by **3.58%** since the most recent census, which recorded a population of **965,893** in 2020.

The average household income in Austin is \$130,163 with a poverty rate of 12.27%. The median age in Austin is 34.5 years: 34.5 years for males, and 34.6 years for females. For every 100 females there are 104.9 males.

1M

3,066

TEXAS SALES AND USE TAX RATES – October 2025

Name	Local Code	Local Rate	Total Rate	Name	Local Code	Local Rate	Total Rate
Amarillo (Randall Co)	2188013	.020000	.082500	Aransas Pass (San Patricio Co)	2205012	.010000	.082500
Amarillo/Randall Co Asst Dist 1 (Randall Co)	6191606	.020000	.082500	Aransas Pass Mun Dev Dist	5205502	.005000	
Ames	2146096	.010000	.077500	Aransas Pass Crm Con Dist	5205511	.005000	
Liberty Co	4146005	.005000		Archer City	2005023	.015000	.082500
Amherst (Lamb Co)	2140010	.012500	.075000	Archer Co	4005005	.005000	
Ammansville			.067500	Arcola (Fort Bend Co)	2079131	.020000	.082500
Fayette Co	4075000	.005000		Argenta			.067500
Amsterdam			.067500	Live Oak Co	4149002	.005000	
Brazoria Co	4020006	.005000		Argyle (Denton Co)	2061104	.015000	.082500
Anahuac (Chambers Co)	2036017	.010000	.082500	Argyle Crm Con Dist	5061550	.002500	
Chambers Co Health Serv	5036507	.005000		Argyle Mun Dev Dist	5061710	.002500	
Anahuac Mun Dev Dist	5036534	.005000		Arlington (Tarrant Co)	2220095	.020000	.082500
Anchor			.067500	Arnett			.067500
Brazoria Co	4020006	.005000		Coryell Co	4050009	.005000	
Anderson	2093035	.012500	.080000	Arney			.067500
Grimes Co	4093008	.005000		Castro Co	4035009	.005000	
Andrews (Andrews Co)	2002017	.020000	.082500	Arp	2212068	.015000	.082500
Angleton	2020042	.015000	.082500	Smith Co	4212004	.005000	
Brazoria Co	4020006	.005000		Art (Mason Co)			.072500
Angus	2175107	.015000	.082500	Mason Co Health Serv	5157500	.010000	
Navarro Co	4175009	.005000		Arthur City			.067500
Anna (Collin Co)	2043134	.020000	.082500	Lamar Co	4139004	.005000	
Annarose			.067500	Asa			.067500
Live Oak Co	4149002	.005000		McLennan Co	4161005	.005000	
Annetta	2184099	.012500	.082500	Asherton	2064030	.010000	.077500
Parker Co	4184008	.005000		Dimmit Co	4064003	.005000	
Annetta Crm Con Dist	5184525	.002500		Ashland			.067500
Annetta North	2184124	.015000	.082500	Upshur Co	4230002	.005000	
Parker Co	4184008	.005000		Asia			.067500
Annetta South	2184115	.010000	.082500	Polk Co	4187005	.005000	
Parker Co	4184008	.005000		Aspermont (Stonewall Co)	2217018	.020000	.082500
Parker Co ESD 1	5184534	.005000		Atascocita (Harris Co)			.072500
Annona	2194042	.010000	.077500	Houston MTA	3101990	.010000	
Red River Co	4194006	.005000		Atascosa (Bexar Co)			.082500
Anson (Jones Co)	2127026	.020000	.082500	San Antonio MTA	3015995	.005000	
Anthony	2071022	.010000	.082500	Bexar Co ESD 5	5015628	.015000	
El Paso Co	4071004	.005000		Ater			.067500
El Paso Co ESD 2	5071503	.005000		Coryell Co	4050009	.005000	
Anton (Hockley Co)	2110025	.020000	.082500	Athens (Henderson Co)	2107011	.020000	.082500
Appleby (Nacogdoches Co)	2174055	.010000	.082500	Atlanta (Cass Co)	2034028	.020000	.082500
Nacogdoches Co Hosp Dist	5174509	.010000		Aubrey (Denton Co)	2061051	.015000	.082500
Aquilla	2109108	.010000	.082500	Aubrey Mun Dev Dist	5061676	.005000	
Hill Co	4109000	.005000		Augusta			.067500
Hill Co ESD 2	5109518	.005000		Houston Co	4113004	.005000	
Aransas Pass	2205012	.010000	.082500	Aurora	2249136	.010000	.082500
Aransas Co	4004006	.005000		Wise Co	4249001	.005000	
Aransas Co Health Serv	5004505	.005000		Aurora Mun Dev Dist	5249537	.005000	
Aransas Pass (Nueces Co)	2205012	.010000	.082500	Austin (Travis Co)	2227016	.010000	.082500
Aransas Pass Mun Dev Dist	5205502	.005000		Austin MTA	3227999	.010000	
Aransas Pass Crm Con Dist	5205511	.005000					



**CITY OF AUSTIN UTILITY RATES AND FEES SCHEDULE**

T-52766  
12/01/2025 Pg. 1 of 3



For detailed information on rates and fees, call **512-494-9400** or **1-888-340-6465**.  
Para información detallada o tarifas en español, llame al **512-494-9400** o llame al **1-888-340-6465**.

**RATES**  
**Austin Energy — ELECTRIC**

RESIDENTIAL RATES	Customer Charge (\$/Month)	Energy Charge (\$/kWh) kWh Tier	Power Supply Adjustment (\$/kWh)	PSA Administrative Adjustment*	Regulatory Charge (\$/kWh)	Community Benefit Charge (\$/kWh)
Inside City Limits	\$16.50	0 - 300 \$0.04640 301 - 900 \$0.05138 901 - 2,000 \$0.07525 Over 2,000 \$0.10884	\$0.04118	-\$0.00206	\$0.01338	\$0.01275
Outside City Limits	\$16.50	0 - 300 \$0.04640 301 - 900 \$0.04664 901 - 2,000 \$0.06066 Over 2,000 \$0.07937	\$0.04118	-\$0.00206	\$0.01338	\$0.01021

**INSIDE COMMERCIAL RATES — INSIDE CITY LIMITS**

Customer Classification	Customer Charge (\$/Month)	Demand Charge (\$/kW)	Energy Charge (\$/kWh)	Power Supply Adjustment (\$/kWh)	PSA Administrative Adjustment*	Regulatory Charge	Community Benefit Charge (\$/kWh)
Secondary < 10 kW	\$38.23	N/A	\$0.03129	\$0.04118	-\$0.00206	0.01338 / kWh	\$0.00948
Secondary ≥ 10 < 300 kW	\$60.08	\$9.83	\$0.01932	\$0.04118	-\$0.00206	\$3.73 / kW	\$0.00948
Secondary ≥ 300 kW	\$300.42	\$12.56	\$0.01840	\$0.04118	-\$0.00206	\$3.73 / kW	\$0.00948
Primary < 3 MW	\$327.73	\$12.56	\$0.00119	\$0.04005	-\$0.00200	\$3.65 / kW	\$0.00927
Primary ≥ 3 < 20 MW	\$2,731.05	\$15.30	\$0.00020	\$0.04005	-\$0.00200	\$3.65 / kW	\$0.00927
Primary ≥ 3 < 20 MW HLF	\$6,881.15	\$14.66	N/A	\$0.04005	-\$0.00200	\$3.65 / kW	\$0.00237
Primary ≥ 20 MW	\$3,004.16	\$16.24	\$0.00166	\$0.04005	-\$0.00200	\$3.65 / kW	\$0.00927
Primary ≥ 20 MW HLF	\$21,848.40	\$15.74	N/A	\$0.04005	-\$0.00200	\$3.65 / kW	\$0.00237
Transmission	\$3,823.47	\$14.21	\$0.00375	\$0.03956	-\$0.00199	\$3.61 / kW	\$0.00918
HLF (Contract) Transmission	\$21,848.40	\$12.10	N/A	\$0.03956	-\$0.00199	\$3.61 / kW	\$0.00237

**OUTSIDE COMMERCIAL RATES — OUTSIDE CITY LIMITS**

Customer Classification	Customer Charge (\$/Month)	Demand Charge (\$/kW)	Energy Charge (\$/kWh)	Power Supply Adjustment (\$/kWh)	PSA Administrative Adjustment*	Regulatory Charge	Community Benefit Charge (\$/kWh)
Secondary < 10 kW	\$38.23	N/A	\$0.03129	\$0.04118	-\$0.00206	0.01338 / kWh	\$0.00694
Secondary ≥ 10 < 300 kW	\$60.08	\$9.83	\$0.01932	\$0.04118	-\$0.00206	\$3.73 / kW	\$0.00694
Secondary ≥ 300 kW	\$300.42	\$12.56	\$0.01840	\$0.04118	-\$0.00206	\$3.73 / kW	\$0.00694
Primary < 3 MW	\$327.73	\$12.56	\$0.00119	\$0.04005	-\$0.00200	\$3.65 / kW	\$0.00681
Primary ≥ 3 < 20 MW	\$2,731.05	\$15.30	\$0.00020	\$0.04005	-\$0.00200	\$3.65 / kW	\$0.00681
Primary ≥ 3 < 20 MW HLF	\$6,881.15	\$14.66	N/A	\$0.04005	-\$0.00200	\$3.65 / kW	\$0.00237
Primary ≥ 20 MW	\$3,004.16	\$16.24	\$0.00166	\$0.04005	-\$0.00200	\$3.65 / kW	\$0.00681
Primary ≥ 20 MW HLF	\$21,848.40	\$15.74	N/A	\$0.04005	-\$0.00200	\$3.65 / kW	\$0.00237
Transmission	\$3,823.47	\$14.21	\$0.00375	\$0.03956	-\$0.00199	\$3.61 / kW	\$0.00675
HLF (Contract) Transmission	\$21,848.40	\$12.10	N/A	\$0.03956	-\$0.00199	\$3.61 / kW	\$0.00237

**OTHER RATES**

Customer Classification	Customer Charge (\$/Month)	Energy Charge (\$/kWh)	Power Supply Adjustment (\$/kWh)	PSA Administrative Adjustment*
Customer Owned Metered Lighting	\$16.39	\$0.08342	\$0.04118	-\$0.00206
Customer Owned Non-Metered Lighting	N/A	\$0.03176	\$0.04118	-\$0.00206

Customer Classification	100 Watt or Less (Billed 35 kWh)	101 - 175 Watt (Billed 60 kWh)	176 - 250 Watt (Billed 90 kWh)	251 Watt or Greater (Billed 140 kWh)	Power Supply Adjustment (\$/kWh)	PSA Administrative Adjustment*
Security Lights	\$10.16	\$17.37	\$26.11	\$40.64	\$0.04118	-\$0.00206

\*Pursuant to Austin City Council Ordinance, the Austin Energy Power Supply Adjustment may be updated monthly as necessary to recover pass-through costs.

In case of discrepancies, the official rates and fees on file with the Austin City Clerk's office takes precedence. For a complete listing of rates and fees, contact us at: 512-494-9400 or 1-888-340-6465, [coutilities.com](http://coutilities.com) or [bulletins.com](http://bulletins.com) or City of Austin, P.O. Box 2267, Austin, TX 78783-2267.

**SMALL RESIDENTIAL SERVICE RATE**

**APPLICABILITY**

Applicable to a small residential customer or builder in a single dwelling, or in a dwelling unit of a multiple dwelling or residential apartment, for domestic purposes. A residential customer includes an individually-metered residential unit or dwelling that is operated by a public housing agency acting as an administrator of public housing programs under the direction of the U.S. Department of Housing and Urban Development and builders prior to sale or re-sale of a property for domestic purposes.

**TERRITORY**

The incorporated areas of the Central-Gulf Service Area which includes Austin, Bayou Vista, Beaumont, Bee Cave, Buda, Cedar Park, Creedmoor, Cuero, Dripping Springs, Galveston, Georgetown, Gonzales, Groves, Hutto, Jamaica Beach, Jarrell, Kyle, Lakeway, Lockhart, Luling, Marble Falls, Mustang Ridge, Nederland, Nixon, Pflugerville, Port Arthur, Port Neches, Rollingwood, Shiner, Sunset Valley, West Lake Hills and Yoakum, Texas.

**COST OF SERVICE RATE**

During each monthly billing period:

A customer charge per meter per month of	\$18.00 plus
Interim Rate Adjustments (IRA)	<u>\$3.36 per month (Footnote 1)</u>
Total Customer Charge	\$21.36 per month

All Ccf per monthly billing period @ \$0.87646 per Ccf

The Company will initially assign each Customer to the rate schedule that is the most economical based on the annual normalized volume at the Customer’s service location for the prior twelve (12)-month period. An anticipated annual normalized usage level assessment will be conducted on each new service and for existing service that has less than twelve (12) months of service. The results of this assessment will decide the initial rate assignment:

Annual Normalized Volume Less than 352 Ccf	Small Residential, Rate Schedule 10
Annual Normalized Volume 352 Ccf or Greater	Large Residential, Rate Schedule 15

Supersedes Rate Schedule Dated  
 November 27, 2024

Meters Read On and After  
 May 27, 2025 (CGSA Cities except Jarrell and Creedmoor)  
 July 1, 2025 (City of Jarrell)  
 August 15, 2025 (City of Creedmoor)

SMALL RESIDENTIAL SERVICE RATE  
(Continued)

The Company will allow customers to elect service on a different rate schedule, provided that the customer must remain on the alternative rate schedule for a period of no less than twelve (12) months. Rate Schedule changes will be effective with the Customer's next scheduled bill.

**OTHER ADJUSTMENTS**

Cost of Gas Component: The basic rates for cost of service set forth above shall be increased by the amount of the Cost of Gas Component for the billing month computed in accordance with the provisions of Rate Schedule 1-INC.

Conservation Adjustment: The billing shall reflect adjustments in accordance with the provisions of the Conservation Adjustment Clause, Rate Schedule CAC and Rate Schedule 1C, if applicable.

Pipeline Integrity Testing Rider: The billing shall reflect adjustments in accordance with provisions of the Pipeline Integrity Testing Rider, Rate Schedule PIT and PIT-Rider, if applicable.

Pipeline Safety and Regulatory Program Fees: The billing shall reflect adjustments in accordance with provisions of the Pipeline Safety and Regulatory Program Fees Rider, Rate Schedule PSF.

Rate Case Expense Rider: The billing shall reflect adjustments in accordance with provisions of the Rate Case Expense Surcharge Rider, Rate Schedule RCE.

Taxes: Plus applicable taxes and fees (including franchise fees) related to above.

Weather Normalization Adjustment: The billing shall reflect adjustments in accordance with the provisions of the Weather Normalization Adjustment Clause, Rate Schedule WNA.

**CONDITIONS**

Subject to all applicable laws and orders, and the Company's rules and regulations on file with the regulatory authority.

Footnote 1: 2024 IRA - \$3.36 (Gas Utilities Case No. 00020233)

Supersedes Rate Schedule Dated  
November 27, 2024

Meters Read On and After  
May 27, 2025 (CGSA Cities except Jarrell  
and Creedmoor)  
July 1, 2025 (City of Jarrell)  
August 15, 2025 (City of Creedmoor)

**Texas Gas Service**  
**Cost of Gas - \$/Mcf (including CRR)**  
**December 2025**

	December 2025	November 2025	Change from last month	December 2024	Change from last year
<b>Central Texas</b>					
Austin - Inc.	8.8736	7.8848	0.9888	8.2472	0.6264
Cedar Park - Inc.	8.8736	7.8848	0.9888	8.2472	0.6264
Westlake Hills - Inc.	8.8736	7.8848	0.9888	8.2472	0.6264
Sunset Valley - Inc.	8.8736	7.8848	0.9888	8.2472	0.6264
Rollingwood - Inc.	8.8736	7.8848	0.9888	8.2472	0.6264
Kyle, Mustang Ridge - Inc.	8.8736	7.8848	0.9888	8.2472	0.6264
Dripping Springs - Inc.	8.8736	7.8848	0.9888	8.2472	0.6264
Bee Cave - Inc.	8.8736	7.8848	0.9888	8.2472	0.6264
Lakeway, Marble Falls - Inc.	8.8736	7.8848	0.9888	8.2472	0.6264
Georgetown, Hutto, Jarrell, Pflugerville - Inc.	8.8736	7.8848	0.9888	8.2472	0.6264
Austin, Bee Cave, Cedar Park, Marble Falls & Westlake Hills - Env.	8.8744	7.8856	0.9888	8.3262	0.5482
Bastrop, Buda, Kyle - Env.	8.8744	7.8856	0.9888	8.3262	0.5482
Dripping Springs - Env.	8.8744	7.8856	0.9888	8.3262	0.5482
Georgetown, Jarrell, Pflugerville - Env.	8.8744	7.8856	0.9888	8.3262	0.5482
<b>South Texas</b>					
STX - Inc.	8.9220	7.9278	0.9942	8.2921	0.6299
STX - Env.	8.9228	7.9286	0.9942	8.3716	0.5512
<b>West Texas</b>					
El Paso - Inc.	5.1143	3.8036	1.3107	4.7939	0.3204
Vinton - Inc.	5.1143	3.8036	1.3107	4.7939	0.3204
Clint - Inc.	5.1143	3.8036	1.3107	4.7939	0.3204
Anthony - Inc.	5.1143	3.8036	1.3107	4.7939	0.3204
Socorro - Inc.	5.1143	3.8036	1.3107	4.7939	0.3204
Horizon City - Inc.	5.1143	3.8036	1.3107	4.7939	0.3204
San Elizario - Inc.	5.1143	3.8036	1.3107	4.7939	0.3204
El Paso, Vinton, Clint, Anthony, Socorro, S.Elizario & Horizon City - Env.	5.4237	3.7837	1.6400	5.2254	0.1983
Fort Bliss	5.8393	4.3544	1.4849	5.4874	0.3519
Dell City - Inc.	5.1143	3.8036	1.3107	4.7939	0.3204
Dell City - Env.	5.4237	3.7837	1.6400	5.2254	0.1983
Monahans, Wink - Inc.	5.3886	4.0076	1.3810	5.0511	0.3375
Barstow - Inc.	5.3886	4.0076	1.3810	5.0511	0.3375
Pyote - Inc.	5.3886	4.0076	1.3810	5.0511	0.3375
Pecos - Inc.	5.3886	4.0076	1.3810	5.0511	0.3375
Thorntonville - Inc.	5.3886	4.0076	1.3810	5.0511	0.3375
Wickett - Inc.	5.3886	4.0076	1.3810	5.0511	0.3375
Pecos, Monahans, Barstow, Wink, Wickett, Thorntonville, Pyote - Env.	5.7146	3.9866	1.7280	5.5056	0.2090
Andrews - Inc.	5.2318	3.8910	1.3408	4.9041	0.3277
Andrews - Env.	5.5484	3.8707	1.6777	5.3455	0.2029
Crane - Inc.	5.3886	4.0076	1.3810	5.0511	0.3375
Crane - Env.	5.7146	3.9866	1.7280	5.5056	0.2090
McCamey - Inc.	5.3886	4.0076	1.3810	5.0511	0.3375
McCamey - Env.	5.7146	3.9866	1.7280	5.5056	0.2090
<b>North Texas</b>					
Jacksboro, Bryson, Mineral Wells, Milsap, Graford, Aledo, Hudson Oaks, Willow Park and Possum Kingdom - Inc.	8.9367	6.9440	1.9927	7.8538	1.0829
Jacksboro, Bryson, Mineral Wells, Milsap, Graford, Aledo, Hudson Oaks, Willow Park and Possum Kingdom - Env.	8.7217	6.9440	1.7777	7.6169	1.1048
Breckenridge, Graham - Inc.	9.0895	7.0627	2.0268	7.9880	1.1015
Breckenridge, Graham - Env.	8.8708	7.0627	1.8081	7.7470	1.1238
Weatherford - Inc.	9.3144	7.3217	1.9927	8.2219	1.0925
Weatherford - Env.	8.7217	6.9440	1.7777	7.6169	1.1048
<b>Panhandle</b>					
Borger - Inc.	4.3008	3.6565	0.6443	5.0363	(0.7355)
Borger - Env.	4.0018	3.4606	0.5412	4.6446	(0.6428)
Skellytown - Inc.	4.2752	3.6347	0.6405	5.0062	(0.7310)
Skellytown - Env.	3.9780	3.4400	0.5380	4.6168	(0.6388)
<b>Rio Grande Valley</b>					
RGV - Inc.	6.6454	4.9860	1.6594	5.1639	1.4815
RGV - Env.	6.1418	4.6788	1.4630	4.8299	1.3119
<b>Galveston</b>					
Galveston - Inc.	9.0553	8.0462	1.0091	8.4161	0.6392
Bayou Vista & Jamaica Beach - Inc.	9.0553	8.0462	1.0091	8.4161	0.6392
Galveston & Bayou Vista - Env.	9.0561	8.0470	1.0091	8.4967	0.5594
<b>Port Arthur</b>					
Port Arthur, Nederland, Port Neches, Groves, Beaumont - Inc.	9.0553	8.0462	1.0091	8.4161	0.6392
Port Arthur, Nederland, Port Neches, Groves - Env.	9.0561	8.0470	1.0091	8.4967	0.5594

**PIPELINE INTEGRITY TESTING (PIT) SURCHARGE RIDER**

**A. APPLICABILITY**

The Pipeline Integrity Testing Surcharge (PIT) rate as set forth in Section (B) below is for the recovery of costs associated with pipeline integrity testing as defined in Rate Schedule PIT. This rate shall apply to the following gas sales and standard transportation rate schedules of Texas Gas Service Company, a Division of ONE Gas, Inc. currently in force in the Company's Central-Gulf Service Area ("CGSA") within the incorporated and unincorporated areas of Austin, Bee Cave, Buda, Cedar Park, Creedmoor, Cuero, Dripping Springs, Georgetown, Gonzales, Hutto, Jarrell, Kyle, Lakeway, Lockhart, Luling, Marble Falls, Mustang Ridge, Nixon, Pflugerville, Rollingwood, Shiner, Sunset Valley, West Lake Hills and Yoakum, Texas and in the environs area of Bastrop and Jonah, Texas: 10, 15, 20, 25, 30, 40, C-1, CNG-1, T-1, 1Z, 1Y, 2Z, 2Y, 3Z, 4Z, C-1-ENV, CNG-1-ENV and T-1-ENV.

**B. PIT RATE**

\$0.00010 per Ccf

This rate will be in effect until all approved and expended pipeline integrity testing expenses are recovered under the applicable rate schedules.

**C. OTHER ADJUSTMENTS**

Taxes: Plus applicable taxes and fees (including franchises fees) related to above.

**D. CONDITIONS**

Subject to all applicable laws and orders, and the Company's rules and regulations on file with the regulatory authority.

Supersedes Rate Schedule Dated  
March 27, 2024

Meters Read On and After  
March 27, 2025 (CGSA Cities except Jarrell and Creedmoor  
and All Unincorporated Central- Gulf Areas except Jarrell, Jonah  
and Creedmoor)  
July 1, 2025 (City of Jarrell and Unincorporated Jarrell and Jonah)  
August 15, 2025 (City of Creedmoor and Unincorporated Creedmoor)

Need Franchise Fee amounts for these cities:

**Travis County**

Austin 5%

**Cameron County**

Brownsville 5%

Rio Grande Valley *Not a city*

Harlingen 5%

La Feria 2%

Los Fresnos 2%

Port Isabel 5%

San Benito 5%

**Dewitt County**

Cuero 2%

**El Paso County**

Anthony 2.25%

El Paso City 5%

Fabens *Not an incorporated city  
No Franchise Fee*

**Hidalgo County**

Alamo 5%

Donna 5%

Edcouch 3%

Edinburg 5%

Elsa 5%

Hidalgo 5%

La Joya 5%

McAllen 5%

Mercedes 5%

Mission 4%

North Alamo *Not TGS*

Pharr 5%

San Juan 5%

Weslaco 5%

**Caldwell County**

Luling 5%

**Jefferson County**

Port Arthur 5%

**Parker County**

\* Weatherford .02846/ccf. (2016)

**Willacy County**

Raymondville 4%

\* Weatherford franchise fee is charged on volumetric basis. The rate is re-calculated each year base on previous year revenue and volume.



## Water & Wastewater Rates

**Multi-Family Water Customers** – Monthly water charges include billing, metering, collections, customer service, and servicing / monitoring of fire hydrants.

Meter Size	Retail Meter Equivalent Charge	Fixed Minimum Charge	TOTAL
5/8	\$7.75	\$12.97	<b>\$20.72</b>
3/4	\$11.63	\$19.46	<b>\$31.09</b>
1	\$19.38	\$32.43	<b>\$51.81</b>
1½	\$50.38	\$84.31	<b>\$134.69</b>
2	\$84.48	\$141.37	<b>\$225.85</b>
3	\$142.60	\$238.65	<b>\$381.25</b>
4	\$253.43	\$424.12	<b>\$677.55</b>
6	\$585.13	\$979.24	<b>\$1,564.37</b>
8	\$1,557.75	\$2,606.97	<b>\$4,164.72</b>
10	\$2,712.50	\$4,539.50	<b>\$7,252.00</b>
12	\$3,410.00	\$5,706.80	<b>\$9,116.80</b>

**Volume Unit Charge** – Rate is charged per 1,000 gallons of water billed during the billing period.

Season	Charge
Off Peak ( <i>November – June Bills</i> )	\$4.86
Peak ( <i>July – October Bills</i> )	\$5.60

**Reserve Fund Surcharge** – **\$0.05** fee is charged per 1,000 gallons of water billed for the billing period to retail customers. The fee revenue goes into a restricted reserve fund to offset water service revenue shortfalls that may impact operations and services.

**Community Benefit Charge** – **\$0.30** fee charged per 1,000 gallons of water billed for the billing period to Non-CAP customers to fund the Customer Assistance Program (CAP).

**GoPurple Community Benefit Charge** – **\$0.15** fee is charged per 1,000 gallons of water billed for the billing period to support foundational aspects of Water Forward initiative.

**Purple Choice (Voluntary)** – retail customers, including CAP customers, can voluntarily opt in for the **Purple Choice** program to support the Reuse strategies outlined in the Water Forward plan. This **\$6.00** charge is billed per account/per customer per month.

**Multi-Family Wastewater Customers** – A monthly wastewater charge of **\$11.26** includes the costs of billing, collections, customer service and other account management services.

**Volume Charge** – A rate of **\$10.71** is charged per 1,000 gallons of wastewater billed during the billing period. The amount of wastewater billed is based on the same volume as domestic meter water usage for properties with an irrigation meter, otherwise it is based on a [Wastewater Average](#).

**Community Benefit Charge** – **\$0.30** fee is charged per 1,000 gallons of wastewater billed for the billing period to Non-CAP customers to fund the Customer Assistance Program (CAP).

**GoPurple Community Benefit Charge** – **\$0.15** fee is charged per 1,000 gallons of wastewater billed for the billing period to support foundational aspects of Water Forward initiative.

## Water & Wastewater Rates

**Residential Water Customers** – Monthly water charges include billing, metering, collections, customer service, and servicing / monitoring of fire hydrants.

Meter Size	Retail Meter Equivalent Charge
5/8*	\$7.75
3/4	\$11.63
1	\$19.38
1½	\$50.38
2	\$84.48
3	\$142.60
4	\$253.43
6	\$585.13
8	\$1,557.75
10	\$2,712.50
12	\$3,410.00

\*5/8 is the average residential customer meter size

**Five-Tier Fixed Charge** – Based on total billed water consumption for the billing period.

Gallons of Water	Fixed Charge
0 - 2,000 Gallons	\$1.36
2,001 - 6,000 Gallons	\$3.91
6,001 - 11,000 Gallons	\$10.43
11,001 - 20,000 Gallons	\$23.54
20,001 - over Gallons	\$35.54

**Five-Tier Volume Charge** – Rate is charged per 1,000 gallons of total billed water consumption for the billing period. Customers must meet qualifications for **Community Assistance Program (CAP) rates**.

Gallons of Water	Non-CAP	CAP**
0 - 2,000 Gallons	\$3.27	\$1.37
2,001 - 6,000 Gallons	\$5.57	\$4.22
6,001 - 11,000 Gallons	\$10.26	\$8.10
11,001 - 20,000 Gallons	\$16.52	\$14.45
20,001 - over Gallons	\$20.40	\$19.20

**Reserve Fund Surcharge** – **\$0.05** fee is charged per 1,000 gallons of water billed for the billing period to Non-CAP and CAP customers. The fee revenue goes into a restricted reserve fund to offset water service revenue shortfalls that may impact operations and services.

**Community Benefit Charge** – **\$0.30** fee is charged per 1,000 gallons of water billed for the billing period to Non-CAP customers to fund the Customer Assistance Program (CAP).

**GoPurple Community Benefit Charge** – **\$0.15** fee is charged per 1,000 gallons of water billed for the billing period to support foundational aspects of Water Forward initiative.

**Purple Choice (Voluntary)** – retail customers, including CAP customers, can voluntarily opt in for the **Purple Choice** program to support the Reuse strategies outlined in the Water Forward plan. This **\$6.00** charge is billed per account/per customer per month.

**Residential Wastewater Customers** – A monthly wastewater charge of **\$11.26** includes the costs of billing, collections, customer service and other account management services.

**Two-Tier Volume Charge** – Rate is charged per 1,000 gallons of wastewater billed during the billing period. The amount of wastewater billed is based upon water usage during the **Wastewater Averaging period**, or monthly water consumption, whichever is lower.

## Water & Wastewater Rates

Gallons of Water	Volume Charge Non-CAP	Volume Charge CAP**
0 - 2,000 Gallons	\$6.30	\$3.80
2,001 – or more Gallons	\$13.40	\$9.85

**Community Benefit Charge – \$0.30** fee is charged per 1,000 gallons of wastewater billed for the billing period to Non-CAP customers to fund the Customer Assistance Program (CAP).

**GoPurple Community Benefit Charge – \$0.15** fee is charged per 1,000 gallons of wastewater billed for the billing period to support foundational aspects of Water Forward initiative.

*\*\*Customers must meet qualifications for Customer Assistance Program (CAP) rates.*

Departments (/departments)

- > Transportation and Public Works (/department/transportation-public-works)
- > About (/department/transportation/about) > Transportation User Fee

# Transportation User Fee

The Transportation User Fee (TUF) is a fee assessed to residents and businesses based on the traffic levels generated by each dwelling unit or business. [View the City of Austin Ordinance regarding the fee. \(http://www.municode.com/library/tx/austin/codes/code\\_of\\_ordinances?nodeId=TIT14USSTPUPR\\_CH14-10TRUSFE\)](http://www.municode.com/library/tx/austin/codes/code_of_ordinances?nodeId=TIT14USSTPUPR_CH14-10TRUSFE)

This monthly fee, as defined in the municipal code, funds the maintenance and repair of roadways, signs, signals and markings, sidewalks and urban trails. This includes annual street resurfacing and other maintenance activities necessary for keeping Austin connected and our infrastructure in good condition. By managing and maintaining public right of way infrastructure, the City of Austin is able to save taxpayer money by intervening before full reconstruction is needed. Full street reconstruction can be costly and time-consuming, therefore preventative maintenance provided by the fee helps reduce these costs.

As part of the annual budget process, Austin City Council reviews and adjusts the fee based on current needs. Residents can expect to see the new rate go into effect during the November billing cycle. For residential customers, the fee is a variable monthly rate.

## Residential Transportation User Fee Rates

Effective Oct. 1, 2025

Building Type	Monthly Fee
Single family home	\$21.80 (SF)
Garage apartment	\$21.80 (SF)
Mobile home	\$14.03 (SF)
Townhouse/condominium	\$16.35 (MF)
Duplex	\$19.62 (MF)
Triplex	\$16.34
Fourplex	\$16.34
Five or more units	\$16.57

$$\begin{array}{r}
 21.80 \\
 +14.03 \\
 \hline
 35.83/2 = \$17.92
 \end{array}$$

$$\begin{array}{r}
 16.35 \\
 +19.62 \\
 \hline
 35.97/2 = \$17.99
 \end{array}$$

For commercial customers, the rate is \$109.00 per developed acre and then multiplied by the usage category, which is based on the type of business.

# Drainage Charge Estimator

The Drainage Charge Estimator can provide a rough estimate of your future drainage charge. In general, the more accurate the information you enter into the calculator the more accurate the estimate is likely to be.

**Enter the amount of impervious cover in square feet.**

(You can estimate by measuring buildings, driveways, garages, decks, walkways, etc., or by using the ruler tool on free [Google Earth Pro \(https://www.google.com/work/mapsearch/products/earthpro.html\)](https://www.google.com/work/mapsearch/products/earthpro.html) software. The City uses aerial photography, permit information and GIS as data sources.)

**Enter the size of the property in square feet.**

(You can estimate by measuring property boundaries or by getting information online from the [Travis Central Appraisal District \(http://www.traviscad.org\)](http://www.traviscad.org), [Hays Central Appraisal District \(http://www.hayscad.com/\)](http://www.hayscad.com/) or the [Williamson Central Appraisal District \(http://www.wcad.org\)](http://www.wcad.org). The City uses the appraisal districts and GIS as data sources.)

**Percentage of impervious cover:** 100%

**Adjustment Factor:** 1.735800

**Estimated Monthly Drainage Charge:** \$15.44

**Disclaimer:**

- The drainage charges shown are estimates made available by the City of Austin as a service to drainage charge ratepayers. The estimates are subject to change.

# Drainage Charge Estimator

The Drainage Charge Estimator can provide a rough estimate of your future drainage charge. In general, the more accurate the information you enter into the calculator the more accurate the estimate is likely to be.

**Enter the amount of impervious cover in square feet.**

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**Enter the size of the property in square feet.**

(You can estimate by measuring property boundaries or by getting information online from the [Travis Central Appraisal District \(http://www.traviscad.org\)](http://www.traviscad.org), [Hays Central Appraisal District \(http://www.hayscad.com/\)](http://www.hayscad.com/) or the [Williamson Central Appraisal District \(http://www.wcad.org\)](http://www.wcad.org). The City uses the appraisal districts and GIS as data sources.)

	1500 SF:	15.44
	2500 SF:	+25.73
	1500-2500 SF	41.17/2= \$20.59

**Percentage of impervious cover:** 100%

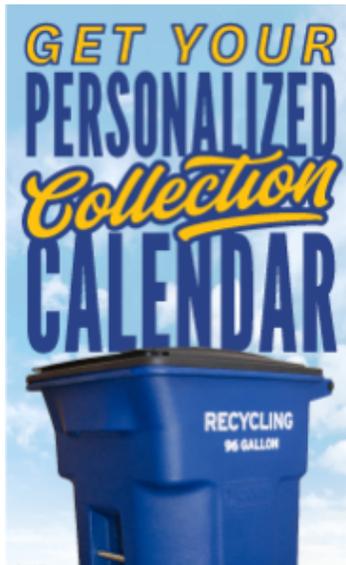
**Adjustment Factor:** 1.735800

**Estimated Monthly Drainage Charge:** \$25.73

**Disclaimer:**

- The drainage charges shown are estimates made available by the City of Austin as a service to drainage charge ratepayers. The estimates are subject to change.

# Residential Services Rates and Fees



[\(/page/my-collection-schedule\)](/page/my-collection-schedule)

Austin Resource Recovery provides bundled services to manage your [recycling](http://www.austintexas.gov/department/single-stream-recycling) (<http://www.austintexas.gov/department/single-stream-recycling>), [composting](http://www.austintexas.gov/department/composting) ([/composting](http://www.austintexas.gov/department/composting)), [trash](http://www.austintexas.gov/department/residential-trash-collection) (<http://www.austintexas.gov/department/residential-trash-collection>), [brush, bulk and household hazardous waste collection](https://www.austintexas.gov/ondemand) (<https://www.austintexas.gov/ondemand>).

Monthly service costs are based on your trash cart size. We offer four trash cart sizes; choose the size that best fits your household's needs. Save money on your utility bill by recycling and composting as much as possible so that you can switch to a smaller trash cart.

Trash cart size	Monthly rates	
Small (24-gallon)	\$28.50*	(0-2 BR)
Medium (32-gallon)	\$30.05*	(3-4 BR)
Large (64-gallon)	\$36.30*	(5 BR)

Extra Large (96-gallon)

\$64.10\*

\*Includes a base fee of \$23.80

## Learn about the base fee

The base fee on the Solid Waste Services section of the City of Austin utility bill pays for curbside recycling, composting, brush, bulk and household hazardous waste collection. Because all these services are bundled into one base fee, you will still be charged for the services even if you opt-out or choose not to participate in one or more services. Austin Resource Recovery encourages you to recycle and compost as much as possible so you can save on your utility bill by choosing a smaller, less expensive trash cart.

## Change the size of your trash cart

You may downsize to a smaller trash cart at no charge. If you switch to a larger trash cart, you will be charged a \$15 one-time cart exchange fee. Administrative rules require that each household have an extra large trash cart before requesting an additional cart. The City also requires that customers' recycling capacity be equal to or larger than their trash capacity. To change your trash cart size, call 512-494-9400.

## Learn about extra trash fees

Extra bags of trash that do not fit in your trash cart with the lid closed must be placed next to the trash cart and tagged with an **extra trash sticker (/extrattrash)**, which can be purchased at most local grocery stores for \$5 plus tax. Extra bags without a sticker will be charged \$10.20 plus tax per bag.

## Learn about the clean community fee

All residents in Austin, including single-family homes and apartment and condo dwellers, pay a monthly \$5.45 Clean Community Fee (this includes the Austin Resource Recovery portion only and is a price increase of \$0.45, effective October 1, 2024) for services that keep Austin clean and enhance the livability of our neighborhoods and the downtown area. The Clean Community Fee funds the following:

- **Street sweeping** (<http://www.austintexas.gov/department/street-sweeping>)
- Litter Abatement
- **Recycle & Reuse Drop-off Center** (<http://www.austintexas.gov/dropoff>)
- **Business outreach** (<http://www.austintexas.gov/department/business-outreach-and-services>)
- Austin Reuse Centers
- **Zero waste program development** (<http://www.austintexas.gov/zerowaste>)
- Clean Austin
- **Dead animal collection** (<http://www.austintexas.gov/department/dead-animal-pick>)
- Boulevard sweeping



# **COMPARISON OF PREVIOUS AND CURRENT UTILITY RATES**

## Comparison of Previous and Current Utility Rates SECTION 8 HCV PROGRAM & ENERGY EFFICIENT

### HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX

**Note: Rates in bold text indicate changes and gray print indicates removal.**

(We use the absolute value of the changes which gives us the percentage of change. This is the best way to determine a 10% change in utility rates and charges.)

#### ELECTRIC

**UPDATE 2025**

<b>Austin Energy</b>		Rates		Difference	
Description	Measure	11/2024	12/2025	Amount	Percent
Customer Charge	per month	\$15.00	<b>\$16.50</b>	\$1.50	<b>10%</b>
Tier-1 Total Energy Chgs (0-300)	per kwh	0.11247	<b>0.11165</b>	-0.00082	<b>-1%</b>
Tier-2 Total Energy Chgs (301-900)	per kwh	0.12279	<b>0.11663</b>	-0.00616	<b>-6%</b>
Tier-3 Total Energy Chgs (901-2000)	per kwh	0.14666	<b>0.14050</b>	-0.00616	<b>-5%</b>
Total Taxes	% of total	3.1637%	3.1637%	0.00	<b>0%</b>

#### NATURAL GAS

<b>Texas Gas Service</b> <i>(Central-Gulf Texas Services Area) (RS 10)</i>		Rates		Difference	
Description	Measure	11/2024	12/2025	Amount	Percent
Total Monthly Charges	per month	\$26.21	<b>\$21.36</b>	-\$4.85	<b>-19%</b>
Total Energy Charges	per ccf	1.23744	<b>1.76392</b>	0.52648	<b>43%</b>
Total Taxes	% of total	8.1637%	8.1637%	0.00	<b>0%</b>

#### WATER, SEWER & TRASH COLLECTION

<b>Austin Water - Multi-Family</b>		Rates		Difference	
Description - <b>Water</b>	Measure	11/2024	12/2025	Amount	Percent
Total Monthly Charges	per month	\$20.30	<b>\$20.72</b>	\$0.42	<b>3%</b>
Total Usage Charges	per 1000 gals	\$5.40	<b>\$5.61</b>	\$0.21	<b>4%</b>
Description - <b>Sewer</b>	Measure	11/2024	12/2025	Amount	Percent
Total Monthly Charges	per month	\$46.48	<b>\$49.83</b>	\$3.35	<b>8%</b>
Total Usage Charges	per 1000 gals	\$10.86	<b>\$11.16</b>	\$0.30	<b>3%</b>

*Continue...*

## Comparison of Previous and Current Utility Rates

### SECTION 8 HCV PROGRAM & ENERGY EFFICIENT

*Austin Water Continued...*

Description - <b>Water</b>	Measure	Rates		Difference	
		11/2024	12/2025	Amount	Percent
Total Monthly Charges (if 2001-6000)	per month	\$11.19	<b>\$11.66</b>	\$0.47	<b>5%</b>
Total Monthly Charges (if 6001-11000)	per month	\$17.43	<b>\$18.18</b>	\$0.75	<b>5%</b>
Tier-1 Total Usage Chgs (0-2000)	per 1000 gals	\$3.63	<b>\$3.77</b>	\$0.14	<b>4%</b>
Tier-2 Total Usage Chgs (2001-6000)	per 1000 gals	\$5.76	<b>\$6.07</b>	\$0.31	<b>6%</b>
Tier-3 Total Usage Chgs (6001-11000)	per 1000 gals	\$10.02	<b>\$10.76</b>	\$0.74	<b>8%</b>
Description - <b>Sewer</b>	Measure	11/2024	12/2025	Amount	Percent
Total Monthly Charges (House)	per month	\$46.49	<b>\$49.76</b>	\$3.27	<b>8%</b>
Tiers-1 Total Usage Chgs (0-2000)	per 1000 gals	\$5.80	<b>\$6.75</b>	\$0.95	<b>17%</b>
Tiers-2 Total Usage Chgs (over 2000)	per 1000 gals	\$11.70	<b>\$13.85</b>	\$2.15	<b>19%</b>
Description - <b>Trash Collection</b> <i>(MF/SF)</i>	Measure	11/2024	12/2025	Amount	Percent
Total Monthly Chgs (24 gal) (0-2 br)	per month	\$31.65	<b>\$33.95</b>	\$2.30	<b>8%</b>
Total Monthly Chgs (32 gal) (3-4 br)	per month	\$33.10	<b>\$35.50</b>	\$2.40	<b>8%</b>
Total Monthly Chgs (64 gal) (5 br)	per month	\$38.85	<b>\$41.75</b>	\$2.90	<b>8%</b>
Sales Tax	% of total	8.25%	8.25%	0.00	<b>0%</b>

**CURRENTLY ADOPTED SECTION 8 UTILITY ALLOWANCES**

# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Multi-Family (Elevator)</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$16.00	\$19.00	\$21.00	\$23.00	\$25.00	\$27.00
	Bottle Gas						
	Electric	\$9.00	\$11.00	\$13.00	\$16.00	\$18.00	\$21.00
	Fuel Oil						
Cooking	Natural Gas	\$4.00	\$4.00	\$7.00	\$8.00	\$11.00	\$12.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$11.00	\$13.00	\$16.00
Other Electric	<b>(Includes Monthly Charge)</b>	\$33.00	\$37.00	\$45.00	\$53.00	\$62.00	\$71.00
Air Conditioning		\$15.00	\$17.00	\$24.00	\$30.00	\$37.00	\$44.00
Water Heating	Natural Gas	\$8.00	\$9.00	\$13.00	\$17.00	\$21.00	\$25.00
	Bottle Gas						
	Electric	\$11.00	\$13.00	\$16.00	\$20.00	\$23.00	\$27.00
	Fuel Oil						
Water		\$40.00	\$41.00	\$49.00	\$57.00	\$65.00	\$73.00
Sewer		\$86.00	\$87.00	\$104.00	\$120.00	\$136.00	\$152.00
Trash Collection		\$34.00	\$34.00	\$34.00	\$36.00	\$36.00	\$42.00
<b>Other specify: Natural Gas Charge \$28.35</b>		\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	\$28.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
Unit Address					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
					Trash Collection		
Number of Bedrooms					Other		
					Range/Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Multi-Family (Apartment)</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$16.00	\$19.00	\$21.00	\$23.00	\$25.00	\$27.00
	Bottle Gas						
	Electric	\$9.00	\$11.00	\$13.00	\$16.00	\$18.00	\$21.00
	Fuel Oil						
Cooking	Natural Gas	\$4.00	\$4.00	\$7.00	\$8.00	\$11.00	\$12.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$11.00	\$13.00	\$16.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$33.00	\$37.00	\$45.00	\$53.00	\$62.00	\$71.00
Air Conditioning		\$15.00	\$17.00	\$24.00	\$30.00	\$37.00	\$44.00
Water Heating	Natural Gas	\$8.00	\$9.00	\$13.00	\$17.00	\$21.00	\$25.00
	Bottle Gas						
	Electric	\$11.00	\$13.00	\$16.00	\$20.00	\$23.00	\$27.00
	Fuel Oil						
Water		\$40.00	\$41.00	\$49.00	\$57.00	\$65.00	\$73.00
Sewer		\$86.00	\$87.00	\$104.00	\$120.00	\$136.00	\$152.00
Trash Collection		\$34.00	\$34.00	\$34.00	\$36.00	\$36.00	\$42.00
<b>Other specify: Natural Gas Charge \$28.35</b>		\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	\$28.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
Unit Address					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
					Trash Collection		
Number of Bedrooms					Other		
					Range/Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Row House/Townhouse</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$23.00	\$27.00	\$29.00	\$31.00	\$33.00	\$36.00
	Bottle Gas						
	Electric	\$14.00	\$16.00	\$19.00	\$22.00	\$25.00	\$28.00
	Fuel Oil						
Cooking	Natural Gas	\$4.00	\$4.00	\$7.00	\$8.00	\$11.00	\$12.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$11.00	\$13.00	\$16.00
Other Electric	<b>(Includes Monthly Charge)</b>	\$38.00	\$42.00	\$53.00	\$64.00	\$76.00	\$87.00
Air Conditioning		\$14.00	\$17.00	\$29.00	\$41.00	\$54.00	\$67.00
Water Heating	Natural Gas	\$9.00	\$12.00	\$17.00	\$23.00	\$27.00	\$32.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$25.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$40.00	\$41.00	\$49.00	\$57.00	\$65.00	\$73.00
Sewer		\$86.00	\$87.00	\$104.00	\$120.00	\$136.00	\$152.00
Trash Collection		\$34.00	\$34.00	\$34.00	\$36.00	\$36.00	\$42.00
<b>Other specify: Natural Gas Charge \$28.35</b>		\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	\$28.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
Unit Address					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
Number of Bedrooms					Trash Collection		
					Other		
					Range/Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Semi-Detached/Duplex</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$23.00	\$27.00	\$29.00	\$31.00	\$33.00	\$36.00
	Bottle Gas						
	Electric	\$14.00	\$16.00	\$19.00	\$22.00	\$25.00	\$28.00
	Fuel Oil						
Cooking	Natural Gas	\$4.00	\$4.00	\$7.00	\$8.00	\$11.00	\$12.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$11.00	\$13.00	\$16.00
Other Electric	<b>(Includes Monthly Charge)</b>	\$38.00	\$42.00	\$53.00	\$64.00	\$76.00	\$87.00
Air Conditioning		\$14.00	\$17.00	\$29.00	\$41.00	\$54.00	\$67.00
Water Heating	Natural Gas	\$9.00	\$12.00	\$17.00	\$23.00	\$27.00	\$32.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$25.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$40.00	\$41.00	\$49.00	\$57.00	\$65.00	\$73.00
Sewer		\$86.00	\$87.00	\$104.00	\$120.00	\$136.00	\$152.00
Trash Collection		\$34.00	\$34.00	\$34.00	\$36.00	\$36.00	\$42.00
<b>Other specify: Natural Gas Charge \$28.35</b>		\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	\$28.00
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
Unit Address					Air Conditioning		
					Water Heating		
					Water		
					Sewer		
Number of Bedrooms					Trash Collection		
					Other		
					Range/Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type <b>Single-Family (Detached House)</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$24.00	\$28.00	\$31.00	\$33.00	\$36.00	\$39.00
	Bottle Gas						
	Electric	\$18.00	\$22.00	\$24.00	\$27.00	\$30.00	\$33.00
	Fuel Oil						
Cooking	Natural Gas	\$4.00	\$4.00	\$7.00	\$8.00	\$11.00	\$12.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$11.00	\$13.00	\$16.00
Other Electric	<b>(Includes Monthly Charge)</b>	\$42.00	\$46.00	\$59.00	\$73.00	\$86.00	\$99.00
Air Conditioning		\$11.00	\$13.00	\$30.00	\$47.00	\$65.00	\$83.00
Water Heating	Natural Gas	\$9.00	\$12.00	\$17.00	\$23.00	\$27.00	\$32.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$25.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$40.00	\$41.00	\$49.00	\$57.00	\$65.00	\$73.00
Sewer		\$86.00	\$87.00	\$104.00	\$120.00	\$136.00	\$152.00
Trash Collection		\$34.00	\$34.00	\$34.00	\$36.00	\$36.00	\$42.00
<b>Other specify: Natural Gas Charge \$28.35</b>		\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	\$28.00
Range /Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
Head of Household Name					Heating		
					Cooking		
					Other Electric		
					Air Conditioning		
Unit Address					Water Heating		
					Water		
					Sewer		
					Trash Collection		
					Other		
Number of Bedrooms					Range / Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

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

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type <b>Manufactured/Mobile Home</b>				Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR
Heating	Natural Gas	\$20.00	\$24.00	\$25.00	\$28.00	\$31.00	\$33.00
	Bottle Gas						
	Electric	\$20.00	\$24.00	\$24.00	\$25.00	\$25.00	\$26.00
	Fuel Oil						
Cooking	Natural Gas	\$4.00	\$4.00	\$7.00	\$8.00	\$11.00	\$12.00
	Bottle Gas						
	Electric	\$5.00	\$6.00	\$8.00	\$11.00	\$13.00	\$16.00
Other Electric	<i>(Includes Monthly Charge)</i>	\$42.00	\$46.00	\$59.00	\$73.00	\$86.00	\$99.00
Air Conditioning		\$14.00	\$16.00	\$28.00	\$39.00	\$52.00	\$64.00
Water Heating	Natural Gas	\$9.00	\$12.00	\$17.00	\$23.00	\$27.00	\$32.00
	Bottle Gas						
	Electric	\$13.00	\$16.00	\$20.00	\$25.00	\$29.00	\$33.00
	Fuel Oil						
Water		\$40.00	\$41.00	\$49.00	\$57.00	\$65.00	\$73.00
Sewer		\$86.00	\$87.00	\$104.00	\$120.00	\$136.00	\$152.00
Trash Collection		\$34.00	\$34.00	\$34.00	\$36.00	\$36.00	\$42.00
<b>Other specify: Natural Gas Charge \$28.35</b>		\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	\$28.00
Range Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance	
					Heating		
Head of Household Name					Cooking		
					Other Electric		
					Air Conditioning		
Unit Address					Water Heating		
					Water		
					Sewer		
					Trash Collection		
					Other		
Number of Bedrooms					Range / Microwave		
					Refrigerator		
					Total		



# Utility Allowance Schedule

See Public Reporting and Instructions on back.

**U.S. Department of Housing and Urban  
Development**

Office of Public and Indian Housing

OMB Approval No. 2577-0169  
(exp. 04/30/2026)

The following allowances are used to determine the total cost of tenant-furnished utilities and appliances.

Locality/PHA <b>Housing Authority of the City of Austin, TX</b>		Unit Type: <b>Multi-Family Energy Efficient</b>					Date (mm/dd/yyyy)	
Utility of Service	Fuel Type	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	
Heating	Natural Gas	\$13.00	\$16.00	\$17.00	\$19.00	\$20.00	\$23.00	
	Bottle Gas							
	Electric	\$8.00	\$9.00	\$11.00	\$13.00	\$15.00	\$17.00	
	Electric Heat Pump							
	Fuel Oil							
Cooking	Natural Gas	\$3.00	\$4.00	\$5.00	\$7.00	\$8.00	\$11.00	
	Bottle Gas							
	Electric	\$4.00	\$5.00	\$7.00	\$9.00	\$11.00	\$13.00	
Other Electric	<b>(Includes climate credit)</b>	\$30.00	\$33.00	\$39.00	\$46.00	\$53.00	\$61.00	
Air Conditioning		\$12.00	\$14.00	\$19.00	\$25.00	\$30.00	\$36.00	
Water Heating	Natural Gas	\$7.00	\$8.00	\$11.00	\$15.00	\$17.00	\$21.00	
	Bottle Gas							
	Electric	\$9.00	\$10.00	\$13.00	\$16.00	\$19.00	\$22.00	
	Fuel Oil							
Water		\$37.00	\$40.00	\$48.00	\$56.00	\$64.00	\$71.00	
Sewer		\$79.00	\$87.00	\$103.00	\$118.00	\$134.00	\$149.00	
Trash Collection		\$34.00	\$34.00	\$34.00	\$36.00	\$36.00	\$42.00	
<b>Other specify: Natural Gas Charge \$28.35</b>		\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	\$28.00	
Range/Microwave		\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	\$11.00	
Refrigerator		\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	
<b>Actual Family Allowances</b> -May be used by the family to compute allowance while searching for a unit.					Utility/Service/Appliance	Allowance		
Head of Household Name					Heating			
					Cooking			
					Other Electric			
					Air Conditioning			
Unit Address					Water Heating			
					Water			
					Sewer			
					Trash Collection			
					Other			
Number of Bedrooms					Range/Microwave			
					Refrigerator			
					Total			



adapted from form HUD-52667  
(04/2023)

## **LOCAL CLIMATOLOGICAL DATA**

**General Information**

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**

Study Date:

PHA/Zip Code\* Lookup:

\*If zip code is unavailable, choose adjacent zip code.

Name/City of HA:

State:

Building Types		#BR	Grouping
Apartment	Yes	0-5	
Row House/Townhouse	Yes	0-5	
Semi-Detached/Duplex			
Detached House	Yes	0-5	
Mobile/Manufactured Home	Yes	0-5	

Average	
Electric	No
Natural Gas	No
Water	No
Sewer	No
Trash	No

6 Schedules - all separate, per Agency  
 MF (Elevator), MF (Apt), (RH/TH), (S-D/D), SF (DH), & (M/MH)  
**No Heat Pump**

**Standard Schedule**

**Climate Data (Degree Days)**

**HEATING**

January	489
February	367
March	218
April	54
May	2
Jun	0
July	0
August	0
September	2
October	39
November	210
December	457
<b>Annual</b>	<b>1837</b>

**COOLING**

January	9
February	18
March	61
April	164
May	361
Jun	516
July	620
August	645
September	450
October	221
November	61
December	13
<b>Annual</b>	<b>3139</b>

**Typical Low Temp**      49

**General Information**

HUSM-Ver13i\_813\_Summit-Update

**HOUSING AUTHORITY OF THE CITY OF AUSTIN, TX**

Study Date:

PHA/Zip Code\* Lookup:

\*If zip code is unavailable, choose adjacent zip code.

Name/City of HA:

State:

Building Types		#BR	Grouping
Apartment	Yes	0-5	Multi-Family
Row House/Townhouse			
Semi-Detached/Duplex			
Detached House			
Mobile/Manufactured Home			

Average	
Electric	No
Natural Gas	No
Water	No
Sewer	No
Trash	No

Multi-Family Energy Efficient

**Energy Efficient Schedule**

**Climate Data (Degree Days)**

**HEATING**

January	489
February	367
March	218
April	54
May	2
Jun	0
July	0
August	0
September	2
October	39
November	210
December	457
<b>Annual</b>	<b>1837</b>

**COOLING**

January	9
February	18
March	61
April	164
May	361
Jun	516
July	620
August	645
September	450
October	221
November	61
December	13
<b>Annual</b>	<b>3139</b>

**Typical Low Temp**



# HOUSING AUTHORITY OF THE CITY OF AUSTIN

## BOARD ACTION REQUEST

### Human Resources ITEM 6.

---

**MEETING DATE:** February 19, 2026  
**STAFF CONTACT:** Gloria Morgan  
**ITEM TITLE:** Presentation, Discussion, and Possible Action regarding Resolution No. 02937: Approval of renewal of Employee Medical, Dental and Vision Insurance with United Healthcare  
**BUDGETED ITEM:** YES  
**TOTAL COST:** **TOTAL COST \$5,935,403.00**

#### ACTION

The board is being asked to approve a contract with United Healthcare for Employee Medical, Dental, and Vision insurance coverage.

#### SUMMARY

**Background:**

As part of its comprehensive compensation package, the Housing Authority of the City of Austin (HACA) currently offers its regular full-time employees medical, dental, and vision coverage through United Healthcare's Navigate plan.

**Process:**

Over several months in mid to late 2025, HACA staff met with Gallagher, HACA's insurance broker, to discuss the upcoming insurance renewal for the 2026-2027 fiscal year.

At the meeting, Gallagher informed HACA that United Healthcare was proposing a 29% rate increase to the current medical insurance coverage, an 8.2% increase to the PPO dental plan, and a 7% rate increase to the HMO dental plan. Last year, HACA received an 18.4% rate increase to our medical insurance coverage.

Based on the initial proposed amount of the premium increases, HACA and Gallagher agreed to issue a Request for Proposals (RFP) to insurance carriers, with a submission deadline of December 9, 2025. A total of eleven (11) proposals were distributed for medical, dental, and vision insurance coverage.

Eight (8) carriers submitted proposals for review to provide fully insured coverage: United Healthcare submitted a renewal with single and dual options; Cigna also submitted single and

dual options; BlueCross/BlueShield, Aetna, Curative, Garner, Evry Health, and Texas Health Benefits Pool. HACA also received two (2) quotes for Self-Funded plans from United Healthcare and High Plains Health with Nationwide S/L. The proposals were received and reviewed by Gallagher in order for them to provide a recommendation to HACA.

Following is a breakdown of the received proposals:

Cigna's single option proposal would result in a 14.5% increase to the agency, and Cigna's dual option would result in an 11.8% increase in premiums to the agency.

BlueCross/BlueShield's proposal would result in a 15.9% increase in premiums to the agency.

Aetna's proposal would result in a 36.4% increase in premiums to the agency.

Curative's proposal would result in a 10.2% increase in premiums to the agency.

Garner's proposal would result in a 4.6% to 7.7% increase in premiums to the agency.

Evry Health and Texas Health Benefits Pool decided not to provide a quote to the agency.

Through a subsequent series of negotiations between United Healthcare and Gallagher, United Healthcare proposed an 11.9% rate increase in premiums, with the following revisions made to our current plan:

- 1) Increase deductible from \$500.00 to \$1,000.00/ individual and \$2,000/ family
- 2) Increase the out-of-pocket max from \$2,000 to \$4,000/ individual and \$8,000/family
- 3) Decrease office visit co-pays from \$25.00 per visit to \$10.00 per visit. (Children under the age of 19 are still covered at 100%)
- 4) Increase specialist visit co-pay from \$50.00 per visit to \$60.00 per visit
- 5) Decrease urgent care co-pay from \$75.00 per visit to \$25.00 per visit
- 6) Increase in Emergency room copay from \$300.00/visit to \$500/visit after the deductible is met
- 7) Increase chiropractic co-pay from \$50.00/ visit to \$60.00/ visit
- 8) Decrease Physical/Occupational/Speech Therapy copay from \$25.00/ visit to \$10.00/visit
- 9) Adding a co-pay for diagnostic test (x-ray, blood work) from \$0 co-pay to \$40.00/ co-pay
- 10) Adding a co-pay for Imaging (CT, PET scan and MRI) previously covered at 100% to a \$500 co-pay.

Based on HACA's demographics and claims experience last year, and after additional review of the plans being offered by the five carriers listed above, it was determined that the proposals submitted by Cigna, Aetna, BlueCross/BlueShield, Curative, and Garner and United Healthcare were not comparable to HACA's current coverage with United Healthcare.

The plans offered by the other carriers do not match the coverage currently being provided by United Healthcare. HACA currently offers employees the Navigate plan, a Health Maintenance Organization (HMO) requiring employees to choose a Primary Care Provider (PCP) and get referrals for specialists within United Healthcare's network. Last year, HACA saw an 18.4% rate

increase. Based on our current demographics and utilization, the proposed increase to retain the Navigate Plan with the above revisions to our coverage is considered reasonable and fiscally sound. In 2026–2027, the \$50 monthly tobacco surcharge will remain, and employees must certify spousal eligibility for employer coverage by affidavit.

Through a subsequent series of negotiations between United Healthcare and Gallagher, United Healthcare proposed a 6.2% PPO rate increase and a 5% increase for the HMO Dental premiums. Vision coverage rates remain unchanged.

**Staff Recommendation:**

In an effort to provide employees with the best affordable, available healthcare coverage, HACA recommends United Healthcare be awarded the renewal contract to provide employee medical, dental, and vision insurance coverage for the 2026-2027 fiscal year.

**ATTACHMENTS:**

HACA\_Renewal Presentation ALL v2\_20260401 (004)

**RESOLUTION NO. 2937**  
**APPROVAL OF AWARD OF CONTRACT FOR EMPLOYEE MEDICAL, DENTAL, AND VISION**  
**INSURANCE**

**WHEREAS**, the Housing Authority of the City of Austin seeks to provide insurance coverage benefits for all regular full-time employees,

**WHEREAS**, the Housing Authority of the City of Austin recommends acceptance of a negotiated renewal proposal from United Healthcare to continue providing employee medical, dental, and vision insurance coverage;

**NOW, THEREFORE, BE IT RESOLVED**, the Housing Authority of the City of Austin Board of Commissioners agrees to award the contract with United Healthcare to provide medical, dental, and vision insurance coverage for all regular full-time employees of the Housing Authority of the City of Austin, the Southwest Housing Compliance Corporation, Austin Affordable Housing Corporation, and Pathways Asset Management Inc.

**PASSED, APPROVED AND ADOPTED** this 19th day of February 2026.

\_\_\_\_\_  
Michael G. Gerber, Secretary

\_\_\_\_\_  
Carl S. Richie, Jr., Chairperson



# Housing Authority of the City of Austin Renewal Meeting

Janet Forbes | Katie Clark

January 16, 2026

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**Gallagher**

Insurance | Risk Management | Consulting

# Agenda

- 1**  
Utilization Review
- 2**  
2026 Executive Summary
- 3**  
Medical Renewal & Market Options
- 4**  
Ancillary Renewal & Market Options
- 5**  
Contributions and Timeline
- 6**  
Disclosures and Disclaimers



## Utilization Review

# Utilization: Premium vs. Claims

Bill / Book Year / Month	Restated Billed Premium	Total Payments	Single Subscribers	Subscribers plus Spouse	Subscribers plus Child/Children	Subscribers plus Family	Total Subscribers	Positively Enrolled Dependents	Total Members
202411	\$ 372,358	\$ 539,215	123	24	56	39	242	236	478
202412	\$ 375,628	\$ 358,428	123	25	57	39	244	239	483
202501	\$ 373,917	\$ 508,281	122	25	56	39	242	237	479
202502	\$ 370,276	\$ 505,421	122	24	55	39	240	234	474
202503	\$ 361,723	\$ 337,285	122	22	54	38	236	227	463
202504	\$ 441,822	\$ 331,094	120	26	59	38	243	246	489
202505	\$ 447,571	\$ 477,715	120	27	58	38	243	245	488
202506	\$ 451,313	\$ 383,135	120	27	58	39	244	247	491
202507	\$ 446,117	\$ 438,166	120	27	59	37	243	242	485
202508	\$ 447,264	\$ 298,349	123	27	58	37	245	241	486
202509	\$ 441,963	\$ 481,767	125	26	59	35	245	237	482
202510	\$ 438,319	\$ 523,373	125	26	59	34	244	233	477
<b>Total</b>	<b>\$ 4,968,271</b>	<b>\$ 5,182,229</b>							

Loss Ratio: 104%

# Utilization: High Claimants

INDV ID	UHC TOTAL PAID	HB 2015 KEY	EMPLOYEE STATUS	ELIGIBLE FOR BENEFITS?	AHRQ CODE 1	TOTAL IP ADMITS	TOTAL IP DAYS	TOTAL IP PAYMENTS	TOTAL OP PAYMENTS	CASE MANAGEMENT	CANCER SUPPORT SERVICES CANCER SUPPORT PROGRAM	KIDNEY RESOURCE SERVICES	INPATIENT CARE MANAGEMENT
1	\$94,653.82	12	ACTIVE	YES	HYPERTENSION WITH COMPLICATION	1	6	\$58,297.45	\$0.00			Qualified	Actively Engaged
2	\$231,145.71	3	ACTIVE	YES	DIABETES MELLITUS WITH COMPLIC	1	3	\$13,506.00	\$36,859.16				
3	\$52,369.33	23	ACTIVE	YES	OTHER EAR AND SENSE ORGAN DISORDER	0	0	\$0.00	\$37,399.00				
4	\$52,018.07	24	ACTIVE	YES	UNDISCLOSED DIAGNOSIS	0	0	\$0.00	\$0.00				
5	\$85,722.53	14	ACTIVE	YES	REGIONAL ENTERITIS/ULCERATIVE COLITIS	0	0	\$0.00	\$4,315.50				
6	\$67,700.60	16	ACTIVE	YES	DIABETES MELLITUS WITH COMPLIC	0	0	\$0.00	\$0.00				
7	\$44,689.45	26	ACTIVE	YES	UNDISCLOSED DIAGNOSIS	0	0	\$0.00	\$0.00				
8	\$98,558.64	11	ACTIVE	YES	UNDISCLOSED DIAGNOSIS	0	0	\$0.00	\$0.00				
9	\$45,011.90	25	ACTIVE	YES	DIABETES MELLITUS	0	0	\$0.00	\$0.00				
10	\$57,415.18	20	ACTIVE	YES	SPONDYLOSIS; INTERVERTEBRAL DISC DISORDERS	0	0	\$0.00	\$29,030.75	Unable to Contact	Actively Engaged		
11	\$100,179.48	9	ACTIVE	YES	OSTEOARTHRITIS	2	7	\$61,866.22	\$69,127.31	Enrolled			
12	\$55,853.81	21	ACTIVE	YES	HEMORRHOIDS	0	0	\$0.00	\$9,840.66				
13	\$61,923.71	18	ACTIVE	YES	SPONDYLOSIS; INTERVERTEBRAL DISC DISORDERS	0	0	\$0.00	\$45,499.69				
14	\$67,356.15	17	ACTIVE	YES	ACUTE MYOCARDIAL INFARCTION	1	2	\$45,183.26	\$0.00				Actively Engaged

# Utilization: High Claimants

INDV ID	UHC TOTAL PAID	HB 2015 KEY	EMPLOYEE STATUS	ELIGIBLE FOR BENEFITS?	AHRQ CODE 1	TOTAL IP ADMITS	TOTAL IP DAYS	TOTAL IP PAYMENTS	TOTAL OP PAYMENTS	CASE MANAGEMENT	CANCER SUPPORT SERVICES CANCER SUPPORT PROGRAM	KIDNEY RESOURCE SERVICES	INPATIENT CARE MANAGEMENT
15	\$42,411.40	28	ACTIVE	YES	BENIGN NEOPLASM OF UTERUS	1	4	\$0.00	\$0.00				Actively Engaged
16	\$85,183.50	15	ACTIVE	YES	ESOPHAGEAL DISORDERS	1	2	\$45,279.21	\$11,570.07				Touched
17	\$87,725.13	13	ACTIVE	YES	SPONDYLOPATHIES/SPONDYLOARTHRITIS	0	0	\$0.00	\$0.00				
18	\$121,646.46	7	ACTIVE	YES	ACUTE MYOCARDIAL INFARCTION	1	2	\$72,089.13	\$33,642.25				Actively Engaged
19	\$100,049.56	10	ACTIVE	YES	OTHER SPECIFIED INFLAMMATORY CONDITION OF SKIN	0	0	\$0.00	\$2,877.00				
20	\$178,686.19	4	ACTIVE	YES	REGIONAL ENTERITIS/ULCERATIVE COLITIS	0	0	\$0.00	\$0.00				
21	\$60,094.34	19	ACTIVE	YES	UNDISCLOSED DIAGNOSIS	0	0	\$0.00	\$0.00				
22	\$141,565.61	5	ACTIVE	YES	REGIONAL ENTERITIS/ULCERATIVE COLITIS	0	0	\$0.00	\$2,470.00				
23	\$43,026.20	27	ACTIVE	YES	OTHER LIVER DISEASES	0	0	\$0.00	\$5,681.84				
24	\$327,670.68	1	ACTIVE	YES	MAINTENANCE CHEMOTHERAPY; RADIOTHERAPY	1	5	\$24,312.00	\$28,418.89		Unable to Contact		Actively Engaged
25	\$53,257.62	22	ACTIVE	YES	BILIARY TRACT DISEASE	1	7	\$37,675.39	\$0.00	Unable to Contact			Actively Engaged
26	\$137,600.52	6	ACTIVE	YES	UNDISCLOSED DIAGNOSIS	0	0	\$0.00	\$0.00				
27	\$313,514.16	2	ACTIVE	YES	THYROID DISORDERS	0	0	\$0.00	\$0.00				
28	\$112,093.94	8	ACTIVE	YES	NONSPECIFIC CHEST PAIN	1	2	\$2,332.00	\$45,792.84	Unable to Contact			Actively Engaged

# Utilization: Top 10 Prescription Drugs

Top 10 Rx by Amount Paid

Rank	Drug Name	Therapeutic Use	Number of Claimants	Number of Prescriptions	Total Amount Paid	% of Total Paid Rx
1	HUMIRA PEN	ANALGESICS - ANTI-INFLAMMATORY*	3	19	\$126,320	14.9%
2	MOUNJARO	ANTIDIABETICS*	22	90	\$91,392	10.8%
3	STELARA	DERMATOLOGICALS*	1	3	\$83,881	9.9%
4	RINVOQ	ANALGESICS - ANTI-INFLAMMATORY*	2	7	\$56,900	6.7%
5	COSENTYX SENSOREADY PEN	DERMATOLOGICALS*	1	6	\$45,424	5.4%
6	OZEMPIC	ANTIDIABETICS*	11	44	\$41,929	4.9%
7	ENBREL	ANALGESICS - ANTI-INFLAMMATORY*	1	6	\$39,968	4.7%
8	DESCOVY	ANTIVIRALS*	3	16	\$33,461	3.9%
9	COSENTYX UNOREADY	DERMATOLOGICALS*	1	4	\$30,144	3.6%
10	BIKTARVY	ANTIVIRALS*	1	6	\$25,051	3.0%
<b>Total</b>			<b>46</b>	<b>201</b>	<b>\$574,471</b>	<b>67.7%</b>

# Utilization: Claims by Size of Payment

Incurred 4/1/2025-9/30/2025			
Range (\$)	Total Payments	Number of Claims	% Of Total Payments
\$ .01-\$49	\$223	10	0.01%
\$50-\$99	\$1,559	20	0.06%
\$100-\$249	\$13,054	74	0.54%
\$250-\$499	\$16,333	46	0.67%
\$500-\$999	\$47,382	66	1.95%
\$1,000-\$2,499	\$78,008	51	3.21%
\$2,500-\$4,999	\$175,397	50	7.21%
\$5,000-\$9,999	\$287,219	41	11.80%
\$10,000-\$14,999	\$193,555	16	7.95%
\$15,000-\$19,999	\$120,670	7	4.96%
\$20,000-\$24,999	\$278,611	12	11.45%
\$25,000-\$29,999	\$29,672	1	1.22%
\$30,000-\$39,999	\$203,750	6	8.37%
\$40,000-\$49,999	\$174,167	4	7.16%
\$50,000-\$74,999	\$419,641	7	17.25%
\$75,000-\$99,999	\$89,661	1	3.68%
\$125,000-\$149,999	\$126,573	1	5.20%
\$175,000-\$199,999	\$177,906	1	7.31%

# Utilization: OOP Deductible Report



Member Cost Sharing Threshold	NETWORK BENEFIT-UHC NETWORK					
	SUBSCRIBER		DEPENDENT		TOTAL	
	NUMBER	PERCENT	NUMBER	PERCENT	NUMBER	PERCENT
01. \$0.00 - \$99.99	47	19.34%	56	28.87%	103	23.57%
02. \$100.00 - \$149.99	13	5.35%	13	6.70%	26	5.95%
03. \$150.00 - \$199.99	11	4.53%	9	4.64%	20	4.58%
04. \$200.00 - \$249.99	9	3.70%	5	2.58%	14	3.20%
05. \$250.00 - \$299.99	3	1.23%	12	6.19%	15	3.43%
06. \$300.00 - \$349.99	8	3.29%	14	7.22%	22	5.03%
07. \$350.00 - \$399.99	6	2.47%	5	2.58%	11	2.52%
08. \$400.00 - \$449.99	9	3.70%	7	3.61%	16	3.66%
09. \$450.00 - \$499.99	5	2.06%	6	3.09%	11	2.52%
10. \$500.00 - \$599.99	13	5.35%	13	6.70%	26	5.95%
11. \$600.00 - \$699.99	17	7.00%	7	3.61%	24	5.49%
12. \$700.00 - \$799.99	7	2.88%	7	3.61%	14	3.20%
13. \$800.00 - \$899.99	10	4.12%	5	2.58%	15	3.43%
14. \$900.00 - \$999.99	9	3.70%	5	2.58%	14	3.20%
15. \$1,000.00 - \$1,499.99	38	15.64%	17	8.76%	55	12.59%
16. \$1,500.00 - \$1,999.99	22	9.05%	4	2.06%	26	5.95%
17. \$2,000.00 - \$2,499.99	16	6.58%	9	4.64%	25	5.72%
18. \$2,500.00 - \$2,999.99	0	0	0	0	0	0

## Executive Summary



## Medical:

- Medical underwriting reviews 24 months of claims experience, 9/01/2023 – 8/31/2025, before releasing renewal.
- Subscriber and member counts increased by 2.5%.
- Age/Gender factor rose by 0.9%.
- The 12-month Loss Ratio, at the time UW reviewed, was 111.6%.
- Ongoing large claims are projected to take up 16% of the renewal premium.
- Formula is calling for a rate increase of 29.6%, Gallagher negotiated to 19%
- Renewal pricing includes PCORI fees, a 2.0% Service Fee

## Dental:

- Group in-force since 2016
- Enrolled: 118
- Credibility: 89.6% (Rates are blended with manuals.)
- PPO LR: 76.9%
- UHC is proposed an 8.2% increase on the PPO & 7% increase on the DHMO, Gallagher negotiated to 6.2% on the PPO and 5% on the DHMO
- Renewal rates are guaranteed for 12 months

# Renewal History



Coverage	Carrier	2021 Rate Action	2022 Rate Action	2023 Rate Action	2024 Rate Action	2025 Rate Action	2026 Rate Action
Fully Insured Medical	United Healthcare	Original: 9% Negotiated: 0%	Original: 18.9% Negotiated: 14.9% Final: 5.52% with change to Navigate	Original: 19% Negotiated: 12.5%	Initial: 28% Negotiated: 19%	Initial: 24% Negotiated: 18.4%	Initial: 29.6% increase Negotiated: 19%
Dental	United Healthcare	Original: 6.6% Negotiated: 0%	Original: 12% Negotiated: 4.5%	Rate Pass	12%	Initial: 12% Negotiated: 10%	PPO: Nego. 6.2% increase HMO: Nego. 5% increase
Voluntary Vision	United Healthcare	Rate Guarantee until 3/31/2022	Rate Pass with an RG until 3/31/2024	Rate Guarantee until 3/31/2024	2.5%	Rate Pass	Rate Pass
Life / Vol. Life	Hartford	Rate Guarantee until 3/31/2024	Rate Guarantee until 3/31/2024	Rate Guarantee until 3/31/2024	Rate Pass RG until 3/31/2026	Rate Guarantee until 3/31/26	Grp Life: 28.6% increase Negotiated: 0%  Voluntary Life: Rate Pass
Long Term Disability	Hartford	Rate Guarantee until 3/31/2024	Rate Guarantee until 3/31/2024	Rate Guarantee until 3/31/2024	Rate Pass RG until 3/31/2026	Rate Guarantee until 3/31/26	Initial: 10.3% increase Negotiated: 0%
Employee Assistance Program	AWP	Renewed	Renewed	Renewed	Rate Pass	Rate Pass	Rate Pass

# Medical Renewal & Market Options

# Considerations

## Remain with UHC Single Option

Increase on Current Plan Design: +19%

- a) No disruption to the employees
- b) White Glove Service
- c) Consistent Initial Renewals even when LR is extremely high
- d) Values long-term partnership
- e) Recommend Increasing Deductible; keeping co-insurance at 100%

Estimated Annual Increase from Current: \$977K with \$500 DED and \$611K \$1000-100% DED for 2026 Plan Year

## Remain with UHC with Dual Option Alt #2

Increase from Current: +5.6%

- a) Limited disruption to the employee
- b) Increased Deductibles
- c) Increased ER/Imaging Copays
- d) White Glove Service
- e) Familiarity of Network

Estimated Annual Increase from Current: \$286K 2026 Plan Year

## Move to Cigna (Matching current plan design)

Increase from Current: +14.5%

- a) Possible Network Disruption
- b) No referrals needed
- c) Level Funded: Possibility of benefiting from a surplus on years HACA is running well

Estimated Annual Increase from Current: \$715K 2026 Plan Year

## Self-Funded

Increase from Current: +31%

- a) Possible Network and/or Plan Design Disruption
- b) HR Administration lift
- c) Risk of unknown claims which would be paid by the group
- d) Possible laser for current large claimants
- e) TLO would need to be added for an additional cost impact

Estimated Annual Increase from Current: \$1.5M 2026 Plan Year



Employee Disruption Spectrum

Lowest – Highest

# Employer Cost Overview

	Current	Negotiated Renewal	Proposed 1	Proposed 2	Proposed 3
<b>Medical</b>	UHC (DQ1F)	UHC (EIJQ)	UHC \$1K Alt#3 HMO (EIVJ)	UHC Dual Alt #2 (Base: EIVL Buy-Up EIVJ)	Cigna \$500 DED
<b>Dental</b>	UHC	UHC	UHC	UHC	UHC
<b>Vision</b>	UHC	UHC	UHC	UHC	UHC
<b>Group Term Life and AD&amp;D</b>	The Hartford	The Hartford	The Hartford	The Hartford	The Hartford
<b>Long-Term Disability</b>	The Hartford	The Hartford	The Hartford	The Hartford	The Hartford
<b>Monthly Costs</b>					
<b>Medical</b>	\$411,829	\$490,079	\$460,750	\$426,204	\$471,547
<b>Dental</b>	\$4,673	\$4,936	\$4,936	\$4,936	\$4,936
<b>Vision</b>	\$1,585	\$1,585	\$1,585	\$1,585	\$1,585
<b>Group Term Life and AD&amp;D</b>	\$2,171	\$2,791	\$2,791	\$2,791	\$2,791
<b>Long-Term Disability</b>	\$3,335	\$3,678	\$3,678	\$3,678	\$3,678
<b>Total Monthly Cost</b>					
	\$423,593	\$503,069	\$473,740	\$439,194	\$484,537
<b>Total Annual Cost</b>					
	\$5,083,119	\$6,036,824	\$5,684,878	\$5,270,328	\$5,814,447
<b>Annual Cost Difference</b>					
	N/A	\$953,705	\$601,759	\$187,209	\$731,328
<b>Percentage (Increase/Decrease)</b>					
	N/A	18.76%	11.84%	3.68%	14.39%

# Fully Insured RFP Responses:

Medical Carrier	Response
UHC Renewal	+19%
UHC Alt Single Option	+11.9%
UHC Alt Dual Option	+5.6%
Cigna LF Single Option	+14.5%
Cigna LF Dual Options	+11.8%
BCBS	+15.9%
Aetna	+26.4%
Curative (Single Option)	+10.2%
Garner	+4.6 to +7.7%
Evry Health	DTQ
TX Health Benefits Pool	DTQ

# UHC Renewal

		CURRENT	RENEWAL	NEGOTIATED RENEWAL
Carrier Name		UnitedHealthcare	UnitedHealthcare	UnitedHealthcare
Plan Name		DQ1F MOD / H9	EIUQ MOD / H9	EIUQ MOD / H9
Plan Creditability Status				
<b>PLAN DESIGN*</b>				
<b>In-Network Benefits</b>		Navigate HMO	Navigate HMO	Navigate HMO
Deductible Type		Embedded	Embedded	Embedded
Calendar Year (CY) Deductible (Individual / Family)		\$500 / \$1,000	\$500 / \$1,000	\$500 / \$1,000
Out-of-Pocket Max Type		Embedded	Embedded	Embedded
CY Out-of-Pocket Max (Individual / Family)		\$2,000 / \$4,000	\$2,000 / \$4,000	\$2,000 / \$4,000
Coinsurance (member pays after deductible)		0%	0%	0%
Preventive Care		Covered 100%	Covered 100%	Covered 100%
Primary Care Visit		\$25 Copay (Under age 19: Covered 100%)	\$25 Copay (Under age 19: Covered 100%)	\$25 Copay (Under age 19: Covered 100%)
Specialist Visit		\$50 Copay	\$50 Copay	\$50 Copay
Urgent Care		\$75 Copay	\$75 Copay	\$75 Copay
Emergency Room		\$300 Copay	\$300 Copay	\$300 Copay
Inpatient Hospital		0% after deductible	0% after deductible	0% after deductible
Outpatient Surgery		0% after deductible	0% after deductible	0% after deductible
Chiropractic (visit limits may apply)		\$50 Copay (20 visits)	\$50 Copay (20 visits)	\$50 Copay (20 visits)
Phys/Occ/Speech Therapy (visit limits may apply)		Outpatient: \$25 Copay; Inpatient: 0% after deductible (Outpatient: 20 visits each; Inpatient: 60 Days)	Outpatient: \$25 Copay; Inpatient: 0% after deductible (Outpatient: 20 visits each; Inpatient: 60 Days)	Outpatient: \$25 Copay; Inpatient: 0% after deductible (Outpatient: 20 visits each; Inpatient: 60 Days)
Diagnostic Test (X-ray, blood work)		Covered 100%	Covered 100%	Covered 100%
Imaging (CT/PET scan, MRI)		0% after deductible	0% after deductible	0% after deductible
<b>Prescription Drug Benefit</b>				
Retail		31 Days	31 Days	31 Days
Tier I / Tier II / Tier III		\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50
Specialty		\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50
Mail Order		90 Days	90 Days	90 Days
Tier I / Tier II / Tier III		\$25 / \$75 / \$125	\$25 / \$75 / \$125	\$25 / \$75 / \$125
<b>Out-of-Network Benefits</b>				
Deductible Type		N/A	N/A	N/A
CY Deductible (Individual / Family)		N/A	N/A	N/A
Out-of-Pocket Max Type		N/A	N/A	N/A
CY Out-of-Pocket Max (Individual / Family)		N/A	N/A	N/A
Coinsurance (member pays after deductible)		N/A	N/A	N/A
<b>COST ANALYSIS</b>				
<b>PEPM Rates - Enrollment per Renewal Document</b>				
	Enrollment	DQ1F MOD / H9	EIUQ MOD / H9	EIUQ MOD / H9
Employee (EE) Only		125	\$1,060.70	\$1,374.70
EE + Spouse		26	\$2,333.55	\$3,024.35
EE + Child(ren)		59	\$2,015.33	\$2,611.93
EE + Family		33	\$3,532.15	\$4,577.78
<b>Total Enrollment</b>		<b>243</b>		
Estimated Monthly Premium		\$428,725	\$555,641	\$510,185
Estimated Annual Premium		\$5,144,703	\$6,667,695	\$6,122,225
Dollar Difference from Current			\$1,522,992	\$977,522
Percent Change from Current			29.6%	19.0%

# UHC Alternatives: Single Plan Options

		CURRENT	RENEWAL OPTION 1	RENEWAL OPTION 2	RENEWAL OPTION 3	RENEWAL OPTION 4	
Carrier Name		UnitedHealthcare	UnitedHealthcare	UnitedHealthcare	UnitedHealthcare	UnitedHealthcare	
Plan Name		DQ1F MOD / H9	EIVT	EIVK	EIVJ	E11H	
PLAN DESIGN*							
In-Network Benefits		Navigate HMO	Navigate HMO	Navigate HMO	Navigate HMO	PROformance	
Deductible Type		Embedded	Embedded	Embedded	Embedded	Embedded	
Calendar Year (CY) Deductible (Individual / Family)		\$500 / \$1,000	\$1,000 / \$2,000	\$2,000 / \$4,000	\$1,000 / \$2,000	\$1,000 / \$2,000	
Out-of-Pocket Max Type		Embedded	Embedded	Embedded	Embedded	Embedded	
CY Out-of-Pocket Max (Individual / Family)		\$2,000 / \$4,000	\$4,000 / \$8,000	\$5,000 / \$10,000	\$4,000 / \$8,000	\$7,150 / \$14,300	
Coinsurance (member pays after deductible)		0%	20%	0%	0%	20%	
Preventive Care		Covered 100%	Covered 100%	Covered 100%	Covered 100%	Covered 100%	
Primary Care Visit		\$25 Copay (Under age 19: Covered 100%)	\$10 Copay (Under age 19: Covered 100%)	\$10 Copay (Under age 19: Covered 100%)	\$10 Copay (Under age 19: Covered 100%)	\$10 Copay (Under age 19: Covered 100%)	
Specialist Visit		\$50 Copay	\$60 Copay	\$60 Copay	\$60 Copay	Designated: \$40 Copay Network: \$80 Copay	
Urgent Care		\$75 Copay	\$25 Copay	\$25 Copay	\$25 Copay	\$25 Copay	
Emergency Room		\$300 Copay	\$500 POD then 20% after deductible	\$500 POD after deductible	\$500 POD after deductible	\$300 POD then 20% after deductible	
Inpatient Hospital		0% after deductible	20% after deductible	0% after deductible	0% after deductible	20% after deductible	
Outpatient Surgery		0% after deductible	20% after deductible	0% after deductible	0% after deductible	20% after deductible	
Chiropractic (visit limits may apply)		\$50 Copay (20 visits)	\$60 Copay (20 visits)	\$60 Copay (20 visits)	\$60 Copay (20 visits)	\$10 Copay (20 visits)	
Phys/Occ/Speech Therapy (visit limits may apply)		Outpatient: \$25 Copay; Inpatient: 0% after deductible (Outpatient: 20 visits each; Inpatient: 60 Days)	Outpatient: \$10 Copay (20 visits); Inpatient: 20% after deductible (60 days)	Outpatient: \$10 Copay (20 visits); Inpatient: 0% after deductible (60 days)	Outpatient: \$10 Copay (20 visits); Inpatient: 0% after deductible (60 days)	Outpatient: \$10 Copay (20 visits); Inpatient: 0% after deductible (60 days)	
Diagnostic Test (X-ray, blood work)		Covered 100%	\$40 Copay	\$40 Copay	\$40 Copay	\$40 Copay	
Imaging (CT/PET scan, MRI)		0% after deductible	\$500 Copay	\$500 Copay	\$500 Copay	\$500 Copay	
Prescription Drug Benefit							
Retail		31 Days	31 Days	31 Days	31 Days	31 Days	
Tier I / Tier II / Tier III		\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	
Specialty		\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	
Mail Order		90 Days	90 Days	90 Days	90 Days	90 Days	
Tier I / Tier II / Tier III		\$25 / \$75 / \$125	\$25 / \$75 / \$125	\$25 / \$75 / \$125	\$25 / \$75 / \$125	\$25 / \$75 / \$125	
Out-of-Network Benefits							
Deductible Type		N/A	N/A	N/A	N/A	Embedded	
CY Deductible (Individual / Family)		N/A	N/A	N/A	N/A	\$5,000 / \$10,000	
Out-of-Pocket Max Type		N/A	N/A	N/A	N/A	Embedded	
CY Out-of-Pocket Max (Individual / Family)		N/A	N/A	N/A	N/A	\$10,000 / \$20,000	
Coinsurance (member pays after deductible)		N/A	N/A	N/A	N/A	50%	
COST ANALYSIS							
PEPM Rates - Enrollment per Renewal Document		Enrollment	DQ1F MOD / H9	EIVT	EIVK	EIVJ	E11H
Employee (EE) Only		125	\$1,060.70	\$1,154.43	\$1,138.05	\$1,186.70	\$1,213.06
EE + Spouse		26	\$2,333.55	\$2,539.76	\$2,503.72	\$2,610.75	\$2,668.74
EE + Child(ren)		59	\$2,015.33	\$2,193.42	\$2,162.30	\$2,254.73	\$2,304.81
EE + Family		33	\$3,532.15	\$3,844.27	\$3,789.73	\$3,951.73	\$4,039.51
Total Enrollment		243					
Estimated Monthly Premium			\$428,725	\$466,610	\$459,990	\$479,653	\$490,307
Estimated Annual Premium			\$5,144,703	\$5,599,322	\$5,519,877	\$5,755,838	\$5,883,688
Dollar Difference from Current				\$454,620	\$375,174	\$611,135	\$738,986
Percent Change from Current				8.8%	7.3%	11.9%	14.4%

# UHC Alternatives: Dual Plan Options

Carrier Name				CURRENT	RENEWAL OPTION 1		RENEWAL OPTION 2		RENEWAL OPTION 3			
UnitedHealthcare				UnitedHealthcare	UnitedHealthcare		UnitedHealthcare		UnitedHealthcare			
Plan Name				DQ1F MOD / H9	Base: EITG (HDHP)	Buy-Up: EIVT	Base: EIVL	Buy-Up: EIVJ	Base: EIVT	Buy-Up: EIXA		
<b>PLAN DESIGN*</b>												
<b>In-Network Benefits</b>												
<b>Deductible Type</b>				Embedded	Choice Plus Embedded	Navigate HMO Embedded	Navigate HMO Embedded	Navigate HMO Embedded	Navigate HMO Embedded	Choice Plus Network Embedded		
<b>Calendar Year (CY) Deductible (Individual / Family)</b>				\$500 / \$1,000	\$3,500 / \$7,000	\$1,000 / \$2,000	\$3,000 / \$6,000	\$1,000 / \$2,000	\$1,000 / \$2,000	\$3,000 / \$6,000		
<b>Out-of-Pocket Max Type</b>				Embedded	Embedded	Embedded	Embedded	Embedded	Embedded	Embedded		
<b>CY Out-of-Pocket Max (Individual / Family)</b>				\$2,000 / \$4,000	\$6,350 / \$12,700	\$4,000 / \$8,000	\$6,000 / \$12,000	\$4,000 / \$8,000	\$4,000 / \$8,000	\$4,500 / \$9,000		
<b>Coinsurance (member pays after deductible)</b>				0%	20%	20%	0%	0%	20%	0%		
<b>Preventive Care</b>				Covered 100%	Covered 100%	Covered 100%	Covered 100%	Covered 100%	Covered 100%	Covered 100%		
<b>Primary Care Visit</b>				\$25 Copay (Under age 19: Covered 100%)	20% after deductible	\$10 Copay (Under age 19: Covered 100%)	\$10 Copay	\$10 Copay (Under age 19: Covered 100%)	\$10 Copay (Under age 19: Covered 100%)	\$30 Copay (Under age 19: Covered 100%)		
<b>Specialist Visit</b>				\$50 Copay	20% after deductible	\$60 Copay	\$60 Copay	\$60 Copay	\$60 Copay	Designated Network: \$30 Copay; Network: \$60 Copay		
<b>Urgent Care</b>				\$75 Copay	20% after deductible	\$25 Copay	\$25 Copay	\$25 Copay	\$25 Copay	\$50 Copay		
<b>Emergency Room</b>				\$300 Copay	20% after deductible	\$500 POD then 20% after deductible	\$500 POD	\$500 POD after deductible	\$500 POD then 20% after deductible	\$500 Copay		
<b>Inpatient Hospital</b>				0% after deductible	20% after deductible	20% after deductible	0% after deductible	0% after deductible	20% after deductible	0% after deductible		
<b>Outpatient Surgery</b>				0% after deductible	20% after deductible	20% after deductible	0% after deductible	0% after deductible	20% after deductible	0% after deductible		
<b>Chiropractic (visit limits may apply)</b>				\$50 Copay (20 visits)	20% after deductible (20 visits)	\$60 Copay (20 visits)	\$60 Copay (20 visits)	\$60 Copay (20 visits)	\$60 Copay (20 visits)	\$30 Copay (20 visits)		
<b>Phys/Occ/Speech Therapy (visit limits may apply)</b>				Outpatient: \$25 Copay; Inpatient: 0% after deductible (Outpatient: 20 visits each; Inpatient: 60 Days)	20% after deductible (Inpatient: 60 days); (Outpatient: 20 visits)	Outpatient: \$10 Copay (20 visits); Inpatient: 20% after deductible (60 days)	Outpatient: \$10 Copay (20 visits); Inpatient: 0% after deductible (60 days)	Outpatient: \$10 Copay (20 visits); Inpatient: 0% after deductible (60 days)	Outpatient: \$10 Copay (20 visits); Inpatient: 20% after deductible (60 days)	Outpatient: \$30 Copay (20 visits); Inpatient: 0% after deductible (60 days)		
<b>Diagnostic Test (X-ray, blood work)</b>				Covered 100%	20% after deductible	\$40 Copay	\$40 Copay	\$40 Copay	\$40 Copay	Covered 100%		
<b>Imaging (CT/PET scan, MRI)</b>				0% after deductible	20% after deductible	\$500 Copay	\$500 Copay	\$500 Copay	\$500 Copay	0% after deductible		
<b>Prescription Drug Benefit</b>												
<b>Retail</b>				31 Days	31 Days	31 Days	30 Days	31 Days	31 Days	31 Days		
<b>Tier I / Tier II / Tier III</b>				\$10 / \$30 / \$50	\$10 / \$35 / \$60 after deductible	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50		
<b>Specialty</b>				\$10 / \$30 / \$50	\$10 / \$35 / \$60 after deductible	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50		
<b>Mail Order</b>				90 Days	90 Days	90 Days	90 Days	90 Days	90 Days	90 Days		
<b>Tier I / Tier II / Tier III</b>				\$25 / \$75 / \$125	\$25 / \$87.50 / \$150 after deductible	\$25 / \$75 / \$125	\$25 / \$75 / \$125	\$25 / \$75 / \$125	\$25 / \$75 / \$125	\$25 / \$75 / \$125		
<b>Out-of-Network Benefits</b>												
<b>Deductible Type</b>				N/A	Embedded	N/A	N/A	N/A	N/A	Embedded		
<b>CY Deductible (Individual / Family)</b>				N/A	\$5,000 / \$10,000	N/A	N/A	N/A	N/A	\$5,000 / \$10,000		
<b>Out-of-Pocket Max Type</b>				N/A	Embedded	N/A	N/A	N/A	N/A	Embedded		
<b>CY Out-of-Pocket Max (Individual / Family)</b>				N/A	\$10,000 / \$20,000	N/A	N/A	N/A	N/A	\$10,000 / \$20,000		
<b>Coinsurance (member pays after deductible)</b>				N/A	50%	N/A	N/A	N/A	N/A	30%		
<b>COST ANALYSIS</b>												
				Est. Enrolled								
<b>PEPM Rates - Enrollment per Renewal Document</b>		Plan 1	BASE (75%)	BUY-UP (25%)	DQ1F MOD / H9	Base: EITG (HDHP)	Buy-Up: EIVT	Base: EIVL	Buy-Up: EIVJ	Base: EIVT	Buy-Up: EIXA	
<b>Employee (EE) Only</b>		125	94	31	\$1,060.70	\$938.98	\$1,154.43	\$1,097.19	\$1,186.70	\$1,154.43	\$1,314.89	
<b>EE + Spouse</b>		26	20	6	\$2,333.55	\$2,065.76	\$2,539.76	\$2,413.83	\$2,610.75	\$2,539.76	\$2,892.77	
<b>EE + Child(ren)</b>		59	44	15	\$2,015.33	\$1,784.06	\$2,193.42	\$2,084.66	\$2,254.73	\$2,193.42	\$2,498.29	
<b>EE + Family</b>		33	25	8	\$3,532.15	\$3,126.82	\$3,844.27	\$3,660.42	\$3,951.73	\$3,844.27	\$4,378.61	
<b>Total Enrollment</b>		<b>243</b>	<b>183</b>	<b>60</b>								
<b>Estimated Monthly Premium</b>					\$428,725	\$286,248	\$114,681	\$334,648	\$117,887	\$351,929	\$130,621	
<b>Estimated Annual Premium</b>					\$5,144,703	\$3,434,982	\$1,376,176	\$4,015,776	\$1,414,644	\$4,223,146	\$1,567,457	
<b>Dollar Difference from Current</b>									\$285,717			\$645,901
<b>Percent Change from Current</b>									5.6%			12.6%

# Cigna LF Market Options: Single Plan Options

Carrier Name		CURRENT	MARKET OPTION 1	MARKET OPTION 2	MARKET OPTION 3
Plan Name		UnitedHealthcare	Cigna	Cigna	Cigna
Plan Creditability Status		DQ1F MOD / H9	OAPIN Alt 2 (38262667)	OAPIN Alt 1 (38262665)	OAPIN (38247509)
<b>PLAN DESIGN*</b>					
<b>In-Network Benefits</b>		Navigate HMO	Open Access Plus	Open Access Plus	Open Access Plus
<b>Deductible Type</b>		Embedded	Embedded	Embedded	Embedded
<b>Calendar Year (CY) Deductible (Individual / Family)</b>		\$500 / \$1,000	\$2,000 / \$4,000	\$1,000 / \$2,000	\$500 / \$1,000
<b>Out-of-Pocket Max Type</b>		Embedded	Embedded	Embedded	Embedded
<b>CY Out-of-Pocket Max (Individual / Family)</b>		\$2,000 / \$4,000	\$5,000 / \$10,000	\$4,000 / \$8,000	\$2,000 / \$4,000
<b>Coinsurance (member pays after deductible)</b>		0%	0%	20%	0%
<b>Preventive Care</b>		Covered 100%	Covered 100%	Covered 100%	Covered 100%
<b>Primary Care Visit</b>		\$25 Copay (Under age 19: Covered 100%)	\$10 Copay	\$10 Copay	\$25 Copay
<b>Specialist Visit</b>		\$50 Copay	\$60 Copay	\$60 Copay	\$50 Copay
<b>Urgent Care</b>		\$75 Copay	\$25 Copay	\$25 Copay	\$75 Copay
<b>Emergency Room</b>		\$300 Copay	\$500 Copay	\$500 Copay	\$300 Copay (Copay waived if admitted)
<b>Inpatient Hospital</b>		0% after deductible	0% after deductible	20% after deductible	0% after deductible
<b>Outpatient Surgery</b>		0% after deductible	0% after deductible	20% after deductible	0% after deductible
<b>Chiropractic (visit limits may apply)</b>		\$50 Copay (20 visits)	\$60 Copay	\$60 Copay	\$50 Copay (20 visits)
<b>Phys/Occ/Speech Therapy (visit limits may apply)</b>		Outpatient: \$25 Copay; Inpatient: 0% after deductible (Outpatient: 20 visits each; Inpatient: 60 Days)	\$60 Copay	\$60 Copay	Outpatient: \$50 Copay (PT: 20 visits); (ST & OT: 20 visits); Inpatient: 0% after deductible (60 Days)
<b>Diagnostic Test (X-ray, blood work)</b>		Covered 100%	0% after deductible	20% after deductible	Covered 100%
<b>Imaging (CT/PET scan, MRI)</b>		0% after deductible	0% after deductible	\$500 Copay	0% after deductible
<b>Prescription Drug Benefit</b>					
<b>Retail</b>		31 Days	30 Days	30 Days	30 Days
<b>Tier I / Tier II / Tier III</b>		\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50
<b>Specialty</b>		\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50
<b>Mail Order</b>		90 Days	90 Days	90 Days	90 Days
<b>Tier I / Tier II / Tier III</b>		\$25 / \$75 / \$125	\$25 / \$75 / \$125	\$25 / \$75 / \$125	\$25 / \$75 / \$125
<b>Out-of-Network Benefits</b>					
<b>Deductible Type</b>		N/A	N/A	N/A	N/A
<b>CY Deductible (Individual / Family)</b>		N/A	N/A	N/A	N/A
<b>Out-of-Pocket Max Type</b>		N/A	N/A	N/A	N/A
<b>CY Out-of-Pocket Max (Individual / Family)</b>		N/A	N/A	N/A	N/A
<b>Coinsurance (member pays after deductible)</b>		N/A	N/A	N/A	N/A
<b>COST ANALYSIS</b>					
<b>PEPM Rates - Enrollment per Renewal Document</b>					
	Enrollment	DQ1F MOD / H9	OAPIN Alt 2 (38262667)	OAPIN Alt 1 (38262665)	OAPIN (38247509)
<b>Employee (EE) Only</b>		125	\$1,060.70	\$1,195.67	\$1,208.09
<b>EE + Spouse</b>		26	\$2,333.55	\$2,630.48	\$2,657.81
<b>EE + Child(ren)</b>		59	\$2,015.33	\$2,271.78	\$2,295.37
<b>EE + Family</b>		33	\$3,532.15	\$3,981.59	\$4,022.94
<b>Total Enrollment</b>		243			
<b>Estimated Monthly Premium</b>		\$428,725	\$483,279	\$488,298	\$490,894
<b>Estimated Annual Premium</b>		\$5,144,703	\$5,799,345	\$5,859,578	\$5,890,722
<b>Dollar Difference from Current</b>			\$654,642	\$714,875	\$746,020
<b>Percent Change from Current</b>			12.7%	13.9%	14.5%

# Self-Funding Approach

# Self Funded RFP Responses:

Medical Carrier	
UHC	Claimant #2 lasered at \$400,000
High Plains Health with Nationwide S/L Gallagher Underwriting (Feasibility Projection)	Not competitive; not preferred vendor with Gallagher.

# Self-Funded Feasibility:

	4/1/2025 - 3/31/2026	4/1/2025 - 3/31/2026	4/1/2026 - 3/31/2027
<b>Financial Category</b>	<b>Current Premiums</b>	<b>Latest Estimate</b>	<b>Projection</b>
<b>Scenario Description</b>			<b>No Design or Rate Change</b>
<b>Medical Trend</b>		7.5%	7.5%
<b>RX Trend</b>		13.0%	13.0%
<b>Pooling Point</b>	\$0	\$125,000	\$125,000
<b>Average Subscribers</b>	244	244	245
<b>PEPM Variable Costs</b>			
Medical Cost		\$1,197.53	\$1,273.76
Pharmacy Cost		\$520.18	\$587.80
<b>PEPM Variable Total</b>		<b>\$1,717.71</b>	<b>\$1,861.56</b>
<b>PEPM Fixed Costs</b>			
Admin Fee & Profit		\$240.80	\$248.03
Pooling Charge		\$168.42	\$193.80
Taxes & Other		\$24.78	\$33.16
Commission		\$27.88	\$37.99
Rx Rebates		\$0.00	\$0.00
<b>PEPM Fixed Costs Total</b>		<b>\$461.88</b>	<b>\$512.98</b>
<b>PEPM Total Gross Cost</b>	<b>\$1,800.21</b>	<b>\$2,179.59</b>	<b>\$2,374.54</b>
<b>Annual Total Gross Cost</b>	<b>\$5,271,000</b>	<b>\$6,382,000</b>	<b>\$6,981,000</b>
PEPM Employee Contributions	\$73.03	\$73.03	\$73.03
Annual Employee Contributions	\$214,000	\$214,000	\$215,000
<b>PEPM Total Net Cost</b>	<b>\$1,727.18</b>	<b>\$2,106.56</b>	<b>\$2,301.51</b>
<b>Annual Total Net Cost</b>	<b>\$5,057,000</b>	<b>\$6,168,000</b>	<b>\$6,766,000</b>
<b>Annual</b>			
<b>Δ Change vs. 2025 - 2026 Gross Premium</b>		<b>\$1,111,000</b>	<b>\$1,710,000</b>
<b>Δ Change vs. Latest Estimate</b>			<b>\$599,000</b>
<b>Δ Change vs. Status Quo Projection</b>			<b>-\$54,000</b>
<b>PEPM</b>			
<b>Δ Change vs. 2025 - 2026 Gross Premium</b>		<b>\$379.38   21.1%</b>	<b>\$574.33   31.9%</b>
<b>Δ Change vs. Latest Estimate</b>			<b>\$194.95   8.9%</b>
<b>Δ Change vs. Status Quo Projection</b>			<b>-\$18.55   -0.8%</b>
<b>H.S.A Employer Seed*</b>	\$0	\$0	\$0

\*Not included in Gross Cost

Employee Contributions reflect non-tobacco rate

	4/1/2026 - 3/31/2027
<b>SF Feasibility</b>	
<b>Illustrative</b>	
	7.5%
	13.0%
	\$125,000
<b>Average Subscribers</b>	245
	\$1,273.76
	\$587.80
	\$1,861.56
	\$62.70
	\$298.33
	\$29.34
<b>Commission</b>	<b>\$0.00</b>
Rx Rebate	-\$32.00
<b>Laser Liability Adjustment</b>	<b>\$136.05</b>
	\$494.42
	\$2,355.98
	\$6,927,000
	\$73.03
	\$215,000
	\$2,282.96
	\$6,712,000
	\$1,656,000
	\$545,000
	-\$54,000
	\$555.78   30.9%
	\$176.40   8.1%
	-\$18.55   -0.8%
	\$0

9/1 Original Renewal Projection: +25%

UW gathered more claims data and updated FI Projection: +32%

UW reviewed claims and ASO Quotes received: Self-Funding Feasibility: +31% (No TLO Included)

Outcome: SF Feasibility is higher then UHC FI initial renewal and not recommended at this time.



# Self-Funding

## Financial Considerations

### Pros

- Potentially minimize annual rate increase
- Remove insurer's profits
- Lower retention and risk charges
- Retain and invest reserves
- Potentially improve cash flow because claims are not paid until after they are incurred
- Reduce state premium tax that is built into premiums
- Remove state mandates/requirements

### Cons

- Potentially assume greater risk
- Experience inconsistent monthly total costs
- Accept volatility of reinsurance market
- Potentially receive lasers at renewal
- Utilize zero-balance accounting for weekly payment of claims
- Accrue for outstanding claims

# Self-Funding

## Administrative Considerations



Gallagher

Insurance | Risk Management | Consulting

### Pros

- Retain more control over the plan
- Control which additional services members receive (disease management, nurseline, etc.)
- Experience less need to change carrier/TPA and networks to obtain better rates
- Maintain seamless process for employees and members when changing reinsurance carriers
- Own claims data and receive more extensive reports and detailed analysis

### Cons

- Commit to additional cash flow management
- Comply with additional ERISA compliance mandates
- Be responsible for additional ACA reporting requirements
- Lose the ability to have a TPA handle ACA fee payment and filing (employer must pay for and file ACA fees)
- Engage additional vendor(s) and create more decisions for benefits staff
- Possibly receive appeals from members

# Ancillary Renewal & Market Options



# Ancillary RFP Responses:

Ancillary Carrier	Dental PPO	Dental DHMO	Vision	Life AD&D	Vol Life AD&D	LTD	Vol STD	Notes
UHC Renewal	8.30%	7%	Rate Pass	NA	NA	NA	NA	
The Hartford Renewal	NA	N/a	NA	+28.6%	0%	+10.3%	Pending Quote	Willing to give a rate pass if VB is added
Aetna	-15%	+11.57	NA	NA	NA	NA	NA	
Ameritas	-22%	+11.4%	-8.80%	NA	NA	NA	NA	
BCBS	+112%	+12.7%	Missing??	NA	NA	NA	NA	
Cigna	-5.90%	+12.6%	NA	NA	NA	NA	NA	
Guardian	0%	+1%	0%	0%	0%	+39.9%	NA	
MetLife	-15.90%	-3.30%	-5.30%	0%	Slightly higher	-4.70%	Quoted	
Mutual of Omaha	DTQ	DTQ	DTQ	0%	0%	+50.2%	NA	
Reliance Standard	DTQ	DTQ	DTQ	-28.60%	0%	+26.6%	Quoted	
Securian Financial	NA	NA	NA	+87.3%	0%	-9.40%	NA	
SunLife	-15.1%	+7.5%	-7.60%	DTQ	DTQ	DTQ	NA	
Symetra	NA	NA	NA	0%	0%	0%	NA	
The Standard	-19.20%	NA	DTQ	-8.70%	0%	+7.3%	Quoted	

# PPO Dental Renewal:

		CURRENT		RENEWAL		NEGOTIATED RENEWAL		
Carrier Name		UnitedHealthcare		UnitedHealthcare		UnitedHealthcare		
Plan Name		Dental Passive PPO 2P924		Dental Passive PPO 2P924		Dental Passive PPO 2P924		
PLAN DESIGN*								
Network		INN [Options PPO 30]	OON	INN [Options PPO 30]	OON	INN [Network Name]	OON	
<b>Calendar Year (CY) Deductible (Individual / Family)</b>		\$50 / \$150	\$50 / \$150	\$50 / \$150	\$50 / \$150	\$50 / \$150	\$50 / \$150	
<b>Annual Maximum</b>		\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	
<b>Annual Maximum Provision</b>		Consumer Max Multiplier: Included Calendar year of less than \$1,000 an additional \$500 will be added to the Maximum Benefit in the next calendar year and an additional \$100 will be added to the Maximum Benefit in the next calendar year when only Network Benefits are utilized up to a limit of \$1,500 additional Maximum Benefit		Consumer Max Multiplier: Included Calendar year of less than \$1,000 an additional \$500 will be added to the Maximum Benefit in the next calendar year and an additional \$100 will be added to the Maximum Benefit in the next calendar year when only Network Benefits are utilized up to a limit of \$1,500 additional Maximum Benefit		Consumer Max Multiplier: Included Calendar year of less than \$1,000 an additional \$500 will be added to the Maximum Benefit in the next calendar year and an additional \$100 will be added to the Maximum Benefit in the next calendar year when only Network Benefits are utilized up to a limit of \$1,500 additional Maximum Benefit		
<b>Coinsurance</b>		100%	100%	100%	100%	100%	100%	
<b>Preventive Services</b>		2 per consecutive	2 per consecutive	2 per consecutive	2 per consecutive	2 per consecutive	2 per consecutive	
<b>Cleaning Frequency</b>		12 months	12 months	12 months	12 months	12 months	12 months	
<b>Deductible Waived?</b>		Yes	Yes	Yes	Yes	Yes	Yes	
<b>Basic</b>		80%	80%	80%	80%	80%	80%	
<b>Periodontics</b>		80%	80%	80%	80%	80%	80%	
<b>Endodontics</b>		80%	80%	80%	80%	80%	80%	
<b>Major</b>		50%	50%	50%	50%	50%	50%	
<b>Major Waiting period</b>		12 months	12 months	12 months	12 months	12 months	12 months	
<b>Implants</b>		50%	50%	50%	50%	50%	50%	
<b>Orthodontics</b>		50%	50%	50%	50%	50%	50%	
<b>Maximum Age</b>		To age 19	To age 19	To age 19	To age 19	To age 19	To age 19	
<b>Deductible</b>		No	No	No	No	No	No	
<b>Lifetime Max</b>		\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	
<b>Ortho Waiting Period</b>		12 months	12 months	12 months	12 months	12 months	12 months	
<b>OON Reimbursement Level</b>		UCR 90th		UCR 90th		UCR 90th		
COST ANALYSIS								
<b>PEPM Rates - Enrollment per Renewal</b>		Plan 1	Dental Passive PPO 2P924		Dental Passive PPO 2P924		Dental Passive PPO 2P924	
<b>Employee (EE) Only</b>		56	\$56.28	\$60.90	\$59.77			
<b>EE + Spouse</b>		9	\$127.35	\$137.80	\$135.25			
<b>EE + Child(ren)</b>		35	\$122.90	\$132.99	\$130.52			
<b>EE + Family</b>		18	\$193.94	\$209.86	\$205.97			
<b>Total Enrollment</b>		<b>118</b>						
<b>Estimated Monthly Premium</b>		\$12,090		\$13,083		\$12,840		
<b>Estimated Annual Premium</b>		<b>\$145,083</b>		<b>\$156,993</b>		<b>\$154,080</b>		
<b>Dollar Difference from Current</b>				<b>\$11,910</b>		<b>\$8,997</b>		
<b>Percent Change from Current</b>				<b>8.2%</b>		<b>6.2%</b>		

# DHMO Dental Renewal:

		CURRENT	RENEWAL	NEGOTIATED RENEWAL
Carrier Name		UnitedHealthcare	UnitedHealthcare	UnitedHealthcare
Plan Name		Dental DHMO - D094C	Dental DHMO - D094C	Dental DHMO - D094C
<b>PLAN DESIGN*</b>				
Network Name		TX DHMO Network	TX DHMO Network	TX DHMO Network
Calendar Year (CY) Deductible (Individual / Family)		\$0	\$0	\$0
<b>Diagnostic &amp; Preventive</b>				
Office Visit (D0999)		\$5 Copay	\$5 Copay	\$5 Copay
Exams (D0120)		\$0 Copay	\$0 Copay	\$0 Copay
Cleanings (D1110/1120)		\$0 - \$25 Copay	\$0 - \$25 Copay	\$0 - \$25 Copay
Deductible Waived?		N/A	N/A	N/A
<b>Basic</b>				
Restorative Fillings (D2140-2332)		\$0 Copay	\$0 Copay	\$0 Copay
Extractions (D7111-7240)		\$8 - \$125 Copay	\$8 - \$125 Copay	\$8 - \$125 Copay
Periodontics (D4341-4260, 4261)		\$45 - \$325 Copay	\$45 - \$325 Copay	\$45 - \$325 Copay
Endodontics Root Canal (D3310-3330)		\$95 - \$305 Copay	\$95 - \$305 Copay	\$95 - \$305 Copay
<b>Major</b>				
Crowns (D2710-2794)		\$150 - \$300 Copay	\$150 - \$300 Copay	\$150 - \$300 Copay
Dentures (D5110-5226)		\$115 - \$325 Copay	\$115 - \$325 Copay	\$115 - \$325 Copay
Orthodontia (D8080/D8090)		\$1,895 Copay	\$1,895 Copay	\$1,895 Copay
<b>COST ANALYSIS</b>				
PEPM Rates - Enrollment per Renewal		Dental DHMO - D094C	Dental DHMO - D094C	Dental DHMO - D094C
	Enrollment			
Employee (EE) Only	74	\$13.61	\$14.56	\$14.29
EE + Spouse	10	\$21.97	\$23.50	\$23.07
EE + Child(ren)	27	\$29.72	\$31.79	\$31.20
EE + Family	12	\$34.84	\$37.27	\$36.58
	<b>Total Enrollment</b>	<b>123</b>		
Estimated Monthly Premium		\$2,447	\$2,618	\$2,570
Estimated Annual Premium		<b>\$29,368</b>	<b>\$31,416</b>	<b>\$30,834</b>
Dollar Difference from Current			<b>\$2,048</b>	<b>\$1,466</b>
Percent Change from Current			<b>7.0%</b>	<b>5.0%</b>

# PPO Dental Options:

Carrier Name Plan Name		CURRENT UnitedHealthcare Dental Passive PPO 2P924		MARKET OPTION 1 SunLife Dental PPO Plan		MARKET OPTION 2 Ameritas Passive PPO Plan 1		MARKET OPTION 3 MetLife Dental Option 1	
PLAN DESIGN*		Network		Network		Network		Network	
		INN [Options PPO 30]	OON	INN [Sun Life Dental Network]	OON	INN [Ameritas Dental Network]	OON	INN	OON
<b>Calendar Year (CY) Deductible (Individual / Family)</b>		\$50 / \$150	\$50 / \$150	\$50 / \$150	\$50 / \$150	\$50 / \$150	\$50 / \$150	\$50 / \$150	\$50 / \$150
<b>Annual Maximum</b>		\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,250	\$2,250
<b>Annual Maximum Provision</b>		Consumer Max Multiplier: Included Calendar year of less than \$1,000 an additional \$500 will be added to the Maximum Benefit in the next calendar year and an additional \$100 will be added to the Maximum Benefit in the next calendar year when only Network Benefits are utilized up to a limit of \$1,500 additional Maximum Benefit		Rollover: Not included		Benefit Threshold: \$750; Annual Carryover Amount: \$400; Maximum Carryover: \$1,200		Rollover: Not included	
<b>Coinsurance</b>		100%	100%	100%	100%	100%	100%	100%	100%
<b>Preventive Services</b>		100%	100%	100%	100%	100%	100%	100%	100%
<b>Cleaning Frequency</b>		2 per consecutive 12 months	2 per consecutive 12 months	2 per year	2 per year	2 per year	2 per year	2 per consecutive 12 months	2 per consecutive 12 months
<b>Deductible Waived?</b>		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Basic</b>		80%	80%	80%	80%	80%	80%	80%	80%
<b>Periodontics</b>		80%	80%	80%	80%	80%	80%	80%	80%
<b>Endodontics</b>		80%	80%	80%	80%	80%	80%	80%	80%
<b>Major</b>		50%	50%	50%	50%	50%	50%	50%	50%
<b>Major Waiting period</b>		12 months	12 months	Late Entrant: 12 Months	Late Entrant: 12 Months	None	None	None	None
<b>Implants</b>		50%	50%	50%	50%	50%	50%	50%	50%
<b>Orthodontics</b>		50%	50%	50%	50%	50%	50%	50%	50%
<b>Maximum Age Deductible</b>		To age 19	To age 19	Child only	Child only	To age 19	To age 19	To age 26	To age 26
<b>Lifetime Max</b>		No	No	No	No	No	No	No	No
<b>Ortho Waiting Period</b>		\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
<b>OON Reimbursement Level</b>		12 months	12 months	Late Entrant: 12 Months	Late Entrant: 12 Months	None	None	None	None
		90th R&C	90th R&C	90th U&C	90th U&C	90th U&C	90th U&C	90th R&C	90th R&C
<b>COST ANALYSIS</b>									
<b>PEPM Rates - Enrollment per Renewal</b>		Plan 1	Dental Passive PPO 2P924	Dental PPO Plan	Dental PPO Plan	Passive PPO Plan 1	Passive PPO Plan 1	Dental Option 1	Dental Option 1
<b>Employee (EE) Only</b>		56	\$56.28	\$47.00	\$47.00	\$42.80	\$42.80	\$47.33	\$47.33
<b>EE + Spouse</b>		9	\$127.35	\$108.84	\$108.84	\$82.36	\$82.36	\$107.09	\$107.09
<b>EE + Child(ren)</b>		35	\$122.90	\$105.04	\$105.04	\$105.24	\$105.24	\$103.35	\$103.35
<b>EE + Family</b>		18	\$193.94	\$165.24	\$165.24	\$144.80	\$144.80	\$163.08	\$163.08
<b>Total Enrollment</b>		118							
<b>Estimated Monthly Premium</b>			\$12,090	\$10,262	\$10,262	\$9,428	\$9,428	\$10,167	\$10,167
<b>Estimated Annual Premium</b>			\$145,083	\$123,147	\$123,147	\$113,134	\$113,134	\$122,004	\$122,004
<b>Dollar Difference from Current</b>				-\$21,936	-\$21,936	-\$31,949	-\$31,949	-\$23,079	-\$23,079
<b>Percent Change from Current</b>				-15.1%	-15.1%	-22.0%	-22.0%	-15.9%	-15.9%
<b>PLAN PROVISIONS</b>									
<b>Rate Guarantee</b>		1 Year rate guarantee ending 03/31/2026		2 Year rate guarantee ending 03/31/2028		2 Year rate guarantee ending 03/31/2028		1 Year rate guarantee ending 03/31/2027	

# DHMO Dental Options:

		CURRENT	MARKET OPTION 1	MARKET OPTION 2	MARKET OPTION 3	
Carrier Name		UnitedHealthcare	Sun Life	Ameritas	MetLife	
Plan Name		Dental DHMO - D094C	PREPAID DENTAL SERIES 225	Co-pay Plan	MET290 - Texas	
PLAN DESIGN*						
Network Name		TX DHMO Network	DHMO Network	DentalSelect Gold	MET290 - Texas	
Calendar Year (CY) Deductible (Individual / Family)		\$0	\$0 / \$0	\$0 / \$0	\$50 / \$150	
<b>Diagnostic &amp; Preventive</b>						
Office Visit (D0999)		\$5 Copay	During regularly scheduled hours: \$10 Copay; After regularly scheduled hours: \$40 Copay	\$0 Copay	\$5 Copay	
Exams (D0120)		\$0 Copay	\$0 Copay	\$0 Copay	\$0 Copay	
Cleanings (D1110/1120)		\$0 - \$25 Copay	\$0 Copay	\$0 Copay	\$5 Copay	
Deductible Waived?		N/A	N/A	\$0 Copay		
<b>Basic</b>						
Restorative Fillings (D2140-2332)		\$0 Copay	\$10 - \$55 Copay		\$12 Copay	
Extractions (D7111-7240)		\$8 - \$125 Copay	\$20 - \$145 Copay	Fixed Copay	\$5 - \$135 Copay (D7140 - D7240)	
Periodontics (D4341-4260, 4261)		\$45 - \$325 Copay	\$60 - \$400 Copay	Fixed Copay	\$40 - \$330 Copay (D4260 - D4910)	
Endodontics Root Canal (D3310-3330)		\$95 - \$305 Copay	\$100 - \$250 Copay	Fixed Copay	\$40 - \$265 Copay (D3220 - D3330)	
<b>Major</b>						
Crowns (D2710-2794)		\$150 - \$300 Copay	\$225 Copay	Fixed Copay Fixed Copay	\$290 Copay (D2750 - D2751)	
Dentures (D5110-5226)		\$115 - \$325 Copay	\$335 - \$800 Copay	Fixed Copay	\$440 - \$405 Copay (D5110 - \$5212)	
Orthodontia (D8080/D8090)		\$1,895 Copay	Adolescent: \$2,000; Adult: \$2,200 Copay	N/A	\$2,095 Copay	
COST ANALYSIS						
PEPM Rates - Enrollment per Renewal		Enrollment	Dental DHMO - D094C	PREPAID DENTAL SERIES 225	Co-pay Plan	MET290 - Texas
Employee (EE) Only		74	\$13.61	\$14.15	\$13.38	\$13.17
EE + Spouse		10	\$21.97	\$23.59	\$27.31	\$21.25
EE + Child(ren)		27	\$29.72	\$31.36	\$33.22	\$28.75
EE + Family		12	\$34.84	\$41.79	\$47.15	\$33.70
<b>Total Enrollment</b>		<b>123</b>				
Estimated Monthly Premium		\$2,447	\$2,631	\$2,726	\$2,368	
Estimated Annual Premium		\$29,368	\$31,574	\$32,712	\$28,413	
Dollar Difference from Current			\$2,206	\$3,343	-\$956	
Percent Change from Current			7.5%	11.4%	-3.3%	
PLAN PROVISIONS						
Rate Guarantee		1 Year rate guarantee ending 03/31/2026	2 Year rate guarantee ending 03/31/2028	2 Year rate guarantee ending 03/31/2028	1 Year rate guarantee ending 03/31/2027	

# Vision Options:

		CURRENT		MARKET OPTION 1		MARKET OPTION 2		MARKET OPTION 3		
Carrier Name		UnitedHealthcare		Sun Life		Ameritas		MetLife		
Plan Name		Vision Plan V1076		Plan 3 Choice		Plan 1: ViewPointe		Vision Option 1		
PLAN DESIGN*										
Network Name		INN [Standard Network]	OON	INN [VSP Network]	OON	INN [EyeMed Insight Network]	OON	INN [Superior Vision National Network]	OON	
Exam (including eyewear exam) Frequency Benefit		12 Months \$10 Copay	12 Months Reimburse up to \$40	12 Months \$10 Copay	12 Months Up to \$45	12 Months \$10 Copay	12 Months Up to \$35	12 Months \$10 Copay	12 Months Reimburse up to \$45	
Lenses Materials Copay Frequency Single Bifocal Trifocal Standard Progressive		\$25 Copay 12 Months \$25 Copay \$25 Copay \$25 Copay \$25 Copay \$25 Copay and the lesser of \$55 or retail billed charge	12 Months Reimburse up to \$40 Reimburse up to \$60 Reimburse up to \$80 Reimburse up to \$0	\$25 Copay 12 Months \$25 Copay \$25 Copay \$25 Copay \$0 Copay	12 Months Up to \$30 Up to \$50 Up to \$60 N/A	\$25 Copay 12 Months \$25 Copay \$25 Copay \$25 Copay \$65 + lens deductible	12 Months Up to \$25 Up to \$40 Up to \$55 No benefit	\$25 Copay 12 Months \$25 Copay \$25 Copay \$25 Copay Up to \$55	12 Months Reimburse up to \$30 Reimburse up to \$50 Reimburse up to \$65 Reimburse up to \$50	
Frames Frequency Allowance		24 Months \$25 Copay then Up to \$130 plus 30% off	24 Months Reimburse up to \$45	24 Months \$25 Copay then up to \$130 plus 20% off	24 Months Up to \$70	24 Months Up to \$150 plus 20% off	24 Months Up to \$75	24 Months Frame: Up to \$130; Select Providers: Up to \$155; Plus 20% off	24 Months Reimburse up to \$70	
Contact Lenses Frequency Allowance Medically Necessary Separate Fitting Allowance		12 Months Formulary: Up to 4 boxes; Non-Formulary: Up to \$125 \$25 Copay then covered in full Included in contact lens allowance	12 Months Reimburse up to \$125 Reimburse up to \$210 N/A	12 Months Up to \$130 \$25 Copay then covered in full Up to \$60 plus 15% off	12 Months Up to \$105 Up to \$210 Up to \$105	12 Months Up to \$150 plus 15% off Covered in Full Standard: Up to \$40; Premium: 10% off of retail	12 Months Up to \$120 Up to \$200 No benefit	12 Months Disposable: Up to \$125 Plus 10% off; Conventional: Up to \$125 Plus 20% off Covered in full Standard: \$25 Copay; Specialty \$25 Copay then Up to \$50	12 Months Reimburse up to \$105 Reimburse up to \$210 Applied to the contact lens allowance	
COST ANALYSIS										
PEPM Rates - Enrollment per Renewal		Enrollment	Vision Plan V1076		Plan 3 Choice		Plan 1: ViewPointe		Vision Option 1	
Employee (EE) Only		137	\$6.47		\$6.00		\$6.40		\$6.13	
EE + Spouse		26	\$12.27		\$11.50		\$12.68		\$11.62	
EE + Child(ren)		53	\$14.38		\$13.00		\$11.48		\$13.62	
EE + Family		29	\$20.23		\$19.00		\$17.76		\$19.17	
Total Enrollment		245								
Estimated Monthly Premium		\$2,554		\$2,361		\$2,330		\$2,420		
Estimated Annual Premium		\$30,651		\$28,332		\$27,960		\$29,037		
Dollar Difference from Current				-\$2,319		-\$2,691		-\$1,614		
Percent Change from Current				-7.6%		-8.8%		-5.3%		
PLAN PROVISIONS										
Rate Guarantee		3 Year rate guarantee ending 03/31/2029		2 Year rate guarantee ending 03/31/2028		2 Year rate guarantee ending 03/31/2028		4 Year rate guarantee ending 03/31/2030		

# Group Term Life AD&D Renewal:

		CURRENT	RENEWAL	NEGOTIATED RENEWAL
Carrier Name		The Hartford	The Hartford	The Hartford
<b>PLAN DESIGN*</b>				
<b>Employee</b>				
Life Benefit		1x Annual Earnings to max \$200,000	1x Annual Earnings to max \$200,000	1x Annual Earnings to max \$200,000
AD&D Benefit		Same as Life amount	Same as Life amount	Same as Life amount
Benefit Reduction Schedule (% benefit reduces by at age)		35% at age 65; 50% at age 70	35% at age 65; 50% at age 70	35% at age 65; 50% at age 70
Definition of Earnings		Basic Annual Earnings	Basic Annual Earnings	Basic Annual Earnings
Waiver of Premium		Included	Included	Included
Accelerated Benefit Amount		80% to max \$500,000	80% to max \$500,000	80% to max \$500,000
Convertible/Portable		Included	Included	Included
Suicide Exclusion		AD&D: Included	AD&D: Included	AD&D: Included
Leave of Absence Maximum Duration		12 Months; Military: 12 Months	12 Months; Military: 12 Months	12 Months; Military: 12 Months
<b>COST ANALYSIS</b>				
	Covered Lives per AMP	CURRENT	RENEWAL	CURRENT
Life Volume	238	\$17,230,000	\$17,230,000	\$17,230,000
AD&D Volume	238	\$17,230,000	\$17,230,000	\$17,230,000
Life Rate Per \$1,000 Vol		\$0.101	\$0.131	\$0.101
AD&D Rate Per \$1,000 Vol		\$0.025	\$0.031	\$0.025
Estimated Monthly Premium		\$2,171	\$2,791	\$2,171
Estimated Annual Premium		<b>\$26,052</b>	<b>\$33,495</b>	<b>\$26,052</b>
Dollar Difference from Current			<b>\$7,443</b>	<b>\$0</b>
Percent Change from Current			<b>28.6%</b>	<b>0%</b>
<b>PLAN PROVISIONS</b>				
Rate Guarantee		2 Year rate guarantee ending 03/31/2026	2 Year rate guarantee ending 03/31/2028	2 Year rate guarantee ending 03/31/2029

# Group Term Life AD&D Options:

		CURRENT	MARKET OPTION 1	MARKET OPTION 2	MARKET OPTION 3	MARKET OPTION 4
Carrier Name		The Hartford	Symetra	MetLife	Reliance Standard	The Standard
<b>PLAN DESIGN*</b>						
<b>Employee</b>						
<b>Life Benefit</b>		1x Annual Earnings to max \$200,000				
<b>AD&amp;D Benefit</b>		Same as Life amount				
<b>Benefit Reduction Schedule (% benefit reduces by at age)</b>		35% at age 65; 50% at age 70	35% at age 65; 50% at age 70	35% at age 65; 50% at age 70	35% at age 65; 50% at age 70	35% at age 65; 50% at age 70
<b>Definition of Earnings</b>		Basic Annual Earnings	Basic Annual Earnings	Basic Monthly Earnings	Basic Annual Earnings	Basic Annual Earnings
<b>Waiver of Premium</b>		Included	Included	Included	Included	Included
<b>Accelerated Benefit Amount</b>		80% to max \$500,000	80% to max \$500,000	80% to max \$500,000	75% to max \$500,000	80% to max \$500,000 (when Basic Life and any Additional Life are combined)
<b>Convertible/Portable</b>		Included	Included	Included	Included	Included
<b>Suicide Exclusion</b>		Included	Included	Included	Included	Included
<b>COST ANALYSIS</b>						
<b>Rates</b>	<b>Covered Lives per AMP</b>	CURRENT	MARKET OPTION 1	MARKET OPTION 2	MARKET OPTION 3	MARKET OPTION 4
<b>Life Volume</b>	238	\$17,230,000	\$17,230,000	\$17,230,000	\$17,230,000	\$17,230,000
<b>AD&amp;D Volume</b>	238	\$17,230,000	\$17,230,000	\$17,230,000	\$17,230,000	\$17,230,000
<b>Life Rate Per \$1,000 Vol</b>		\$0.101	\$0.101	\$0.105	\$0.065	\$0.100
<b>AD&amp;D Rate Per \$1,000 Vol</b>		\$0.025	\$0.025	\$0.021	\$0.025	\$0.015
<b>Estimated Monthly Premium</b>		\$2,171	\$2,171	\$2,171	\$1,551	\$1,981
<b>Estimated Annual Premium</b>		<b>\$26,052</b>	<b>\$26,052</b>	<b>\$26,052</b>	<b>\$18,608</b>	<b>\$23,777</b>
<b>Dollar Difference from Current</b>			<b>\$0</b>	<b>\$0</b>	<b>-\$7,443</b>	<b>-\$2,274</b>
<b>Percent Change from Current</b>			<b>0.0%</b>	<b>0.0%</b>	<b>-28.6%</b>	<b>-8.7%</b>
<b>PLAN PROVISIONS</b>						
<b>Rate Guarantee</b>		2 Year rate guarantee ending 03/31/2026	3 Year rate guarantee ending 03/31/2029	3 Year rate guarantee ending 03/31/2029	2 Year rate guarantee ending 03/31/2028	3 Year rate guarantee ending 12/31/2028

# Voluntary Life AD&D Options:

Carrier Name		CURRENT The Hartford		MARKET OPTION 1 Symetra		MARKET OPTION 2 MetLife		MARKET OPTION 3 Reliance Standard		MARKET OPTION 4 The Standard	
<b>PLAN DESIGN*</b>											
<b>Employee Benefit Increments Benefit Maximum</b>		\$10,000 5x Annual Earnings to max \$500,000		\$10,000 5x Annual Earnings to max \$500,000		\$10,000 5x Annual earnings to max \$500,000		\$10,000 5x Annual Earnings to max \$500,000		\$10,000 \$500,000 (Basic Life benefits plus Additional Life benefits may not exceed 8 times annual earnings) \$140,000	
<b>Guarantee Issue AD&amp;D Benefit</b>		\$140,000 Same as Voluntary Life amount		\$140,000 Same as Voluntary Life amount		\$140,000 Same as Voluntary Life amount		\$140,000 Same as Voluntary Life amount		\$140,000 Same as Voluntary Life amount	
<b>Benefit Reduction Schedule (% benefit reduces by at age)</b>		35% at age 65; 50% at age 70		35% at age 65; 50% at age 70		No Age Reduction		35% at age 65; 50% at age 70		35% at age 65; 50% at age 70	
<b>Spouse Benefit Increments Benefit Maximum</b>		\$5,000 \$100,000, not to exceed 100% of EE's amount		\$5,000 \$100,000, not to exceed 100% of EE's amount		\$5,000 \$100,000, not to exceed 50% of EE's amount		\$5,000 \$100,000, not to exceed 100% of EE's amount		\$5,000 \$100,000, not to exceed 100% of EE's amount	
<b>Guarantee Issue AD&amp;D Benefit</b>		\$30,000 Same as Voluntary Life amount		\$30,000 Same as Voluntary Life amount		\$30,000 Same as Voluntary Life amount		\$30,000 \$100,000, not to exceed 50% of EE's amount Employee		\$30,000 Same as Voluntary Life amount	
<b>Based on Employee or Spouse Age Benefit Reduction Schedule (% benefit reduces by at age)</b>		35% at age 65; 50% at age 70		35% at age 65; 50% at age 70		No Age Reduction		35% at age 65; 50% at age 70		35% at age 65; 50% at age 70	
<b>Child Benefit (Life/AD&amp;D)</b>		Live birth but under age 26 year(s): \$10,000		Live birth to age 26: \$10,000		Child Under 15 days: \$5,000; Child 15 days to 6 months old: \$10,000 Child more than 6 months old: Options of \$1,000, \$2,000, \$4,000, \$5,000 or \$10,000; Child limiting age: 26, 26 if a full time student		Live Birth to age 26: \$10,000		Live birth through age 25: \$10,000	
<b>Definition of Earnings Waiver of Premium</b>		Basic Annual Earnings Included		Basic Annual Earnings Included		Basic Monthly Earnings Included		Basic Annual Earnings Included		Employee: Included; Dependents: Not Included 80% to max \$500,000 (When Basic Life and any Additional Life are combined); Dependents: Not Included Life: Included; AD&D - Portability: Included Included	
<b>Accelerated Benefit</b>		80% to max \$500,000		80% to max \$500,000		80% to max \$500,000		75% to max \$500,000			
<b>Conversion/Portability</b>		Included		Life: Included; AD&D: Not Included Included		Included		Included		Included	
<b>Continuity of Coverage Suicide Exclusion</b>		Included Included / 24 Months		Included Included / 24 Months		Included Life: Included / 24 Months; AD&D: Included		Included Included / 24 Months		Included Included / 24 Months	
<b>COST ANALYSIS</b>											
<b>Voluntary Rates per \$1,000</b>		<b>Covered Lives per AMP</b>		<b>Employee</b>		<b>Spouse</b>		<b>Employee</b>		<b>Spouse</b>	
<b>Age Range (spouse based on EE's age)</b>		<b>EE: 107; SP: 42; CH: 43</b>		<b>Employee</b>		<b>Spouse</b>		<b>Employee</b>		<b>Spouse</b>	
0 - 19				\$0.070		\$0.070		\$0.072		\$0.072	
20 - 24				\$0.070		\$0.070		\$0.072		\$0.072	
25 - 29				\$0.070		\$0.070		\$0.072		\$0.072	
30 - 34				\$0.080		\$0.080		\$0.082		\$0.082	
35 - 39				\$0.120		\$0.120		\$0.122		\$0.122	
40 - 44				\$0.180		\$0.180		\$0.182		\$0.182	
45 - 49				\$0.300		\$0.300		\$0.302		\$0.302	
50 - 54				\$0.490		\$0.490		\$0.492		\$0.492	
55 - 59				\$0.800		\$0.800		\$0.802		\$0.802	
60 - 64				\$1.010		\$1.010		\$1.012		\$1.012	
65 - 69				\$1.610		\$1.610		\$1.612		\$1.612	
70 - 74				\$2.810		\$2.810		\$2.812		\$2.812	
75 - 79				\$4.760		\$4.760		\$4.762		\$4.762	
80+				\$4.760		\$4.760		\$4.762		\$4.762	
<b>Child Rate</b>		\$0.022		\$0.200		\$0.185		\$0.200		\$0.200	
<b>AD&amp;D Rate (Employee / Spouse / Child)</b>		\$0.022 / \$0.022 / \$0.022		\$0.022 / \$0.022 / \$0.022		\$0.020 / \$0.020 / \$0.051		\$0.025 / \$0.025 / \$0.025		\$0.025 / \$0.025 / \$0.030	
<b>PLAN PROVISIONS</b>											
<b>Rate Guarantee</b>		3 Year rate guarantee ending 03/31/2020		3 Year rate guarantee ending 03/31/2029		3 Year rate guarantee ending 03/31/2029		2 Year rate guarantee ending 03/31/2028		3 Year rate guarantee ending 12/31/2028	

# ER Paid LTD Renewal:

		CURRENT	RENEWAL	NEGOTIATED RENEWAL
Carrier Name		The Hartford	The Hartford	The Hartford
<b>PLAN DESIGN*</b>				
Benefit		60% to max \$6,000	60% to max \$6,000	60% to max \$6,000
Elimination Period		90 Days	90 Days	90 Days
Duration of Benefits		SSNRA or 42 months, if greater	SSNRA or 42 months, if greater	SSNRA or 42 months, if greater
Own Occupation Continuation		24 Months	24 Months	24 Months
<b>Features and Limitations</b>				
Definition of Earnings		Basic Monthly Earnings	Basic Monthly Earnings	Basic Monthly Earnings
Definition of Disability		"And" Definition of Disability	"And" Definition of Disability	"And" Definition of Disability
Total and Partial Disability		Partial: Included	Partial: Included	Partial: Included
Return to Work		12 Months	12 Months	12 Months
Workplace Modification Benefit		Up to \$25,000	Up to \$25,000	Up to \$25,000
Rehabilitation Benefit		Included	Included	Included
Minimum Benefit		\$100 or 10% of benefit whichever is greater	\$100 or 10% of benefit whichever is greater	\$100 or 10% of benefit whichever is greater
Pre-Existing Condition Limitation		3/12	3/12	3/12
Earnings Test		80% Own Occupation / 60% Any Occupation	80% Own Occupation / 60% Any Occupation	80% Own Occupation / 60% Any Occupation
Social Security Integration		Family	Family	Family
Disability Limitations				
Mental Health		24 Months	24 Months	24 Months
Substance Abuse		24 Months	24 Months	24 Months
Recurrent Disability		6 Months	6 Months	6 Months
Waiver of Premium		Included	Included	Included
<b>COST ANALYSIS</b>				
	Covered Lives per AMP	CURRENT	RENEWAL	CURRENT
Covered Payroll	250	\$1,431,230	\$1,431,230	\$1,431,230
Rate Per \$100 of Covered Payroll		\$0.233	\$0.257	\$0.233
Estimated Monthly Premium		\$3,335	\$3,678	\$3,335
Estimated Annual Premium		<b>\$40,017</b>	<b>\$44,139</b>	<b>\$40,017</b>
Dollar Difference from Current			<b>\$4,122</b>	<b>\$0</b>
Percent Change from Current			<b>10.3%</b>	<b>0%</b>
<b>PLAN PROVISIONS</b>				
Rate Guarantee		2 Year rate guarantee ending 03/31/2026	2 Year rate guarantee ending 03/31/2028	3 Year rate guarantee ending 03/31/2029

# ER Paid LTD Options:

Carrier Name		CURRENT The Hartford	MARKET OPTION 1 Symetra	MARKET OPTION 2 MetLife	MARKET OPTION 3 Reliance Standard	MARKET OPTION 4 The Standard
<b>PLAN DESIGN*</b>						
<b>Benefit</b>		60% to max \$6,000	60% to max \$6,000	60% to max \$6,000	60% to max \$6,000	60% to max \$6,000
<b>Elimination Period</b>		90 Days	90 Days	90 Days	90 Days	90 Days
<b>Duration of Benefits</b>		SSNRA or 42 months, if greater	SSNRA	RBD w/ SSNRA	SSNRA or To age 65	To SSNRA
<b>Own Occupation Continuation</b>		24 Months	24 Months	24 Months	24 Months	24 Months
<b>Features and Limitations</b>						
<b>Definition of Earnings</b>		Basic Monthly Earnings	Basic Monthly Earnings	Basic Monthly Earnings	Basic Monthly Earnings	Basic Monthly Earnings
<b>Definition of Disability</b>		"And" Definition of Disability	"Or" Definition of Disability	"And" Definition of Disability	"And" Definition of Disability	"And" Definition of Disability
<b>Total and Partial Disability</b>		Partial: Included	Partial: Included	Included	Partial: Included	Partial: Included
<b>Return to Work</b>		12 Months	12 Months	24 Months	12 Months	12 Months
<b>Minimum Benefit</b>		\$100 or 10% of benefit whichever is greater	\$100 or 10% of benefit whichever is greater	\$100	\$100	\$100 or 10%
<b>Pre-Existing Condition Limitation</b>		3/12	3/12	3/12	3/12	3/12
<b>Earnings Test</b>		80% Own Occupation / 60% Any Occupation	80% / 60%	80% Own Occupation / 60% Any Gainful Occupation	80% Own Occupation / 60% Any Gainful Occupation	80% Own Occupation / 60% Any Gainful Occupation
<b>Social Security Integration</b>		Family	Direct Family	Direct Family	Full	Primary and Dependents
<b>Disability Limitations</b>						
<b>Mental Health</b>		24 Months	24 Months	24 Months	24 Months	24 Months
<b>Substance Abuse</b>		24 Months	24 Months	24 Months	24 Months	24 Months
<b>Waiver of Premium</b>		Included	Included	Included	Included	Included
<b>EAP Offered?</b>		Included	Included	Included (Premier Option 3 – 5 sessions)	Included: 3 Face-to-face visits	Included: 3 face-to-face
<b>COST ANALYSIS</b>						
	<b>Covered Lives per AMP</b>	CURRENT	MARKET OPTION 1	MARKET OPTION 2	MARKET OPTION 3	MARKET OPTION 4
<b>Covered Payroll</b>	250	\$1,431,320	\$1,431,320	\$1,431,320	\$1,431,320	\$1,431,320
<b>Rate Per \$100 of Covered Payroll</b>		\$0.233	\$0.233	\$0.222	\$0.295	\$0.250
<b>Estimated Monthly Premium</b>		\$3,335	\$3,335	\$3,178	\$4,222	\$3,578
<b>Estimated Annual Premium</b>		<b>\$40,020</b>	<b>\$40,020</b>	<b>\$38,130</b>	<b>\$50,669</b>	<b>\$42,940</b>
<b>Dollar Difference from Current</b>			\$0	-\$1,889	\$10,649	\$4,809
<b>Percent Change from Current</b>			0.0%	-4.7%	26.6%	12.0%
<b>PLAN PROVISIONS</b>						
<b>Rate Guarantee</b>		2 Year rate guarantee ending 03/31/2026	3 Year rate guarantee ending 03/31/2029	3 Year rate guarantee ending 03/31/2029	2 Year rate guarantee ending 03/31/2028	3 Year rate guarantee ending 12/31/2028

# Voluntary STD Option:

	MARKET OPTION 1
Carrier Name	The Hartford
<b>PLAN DESIGN*</b>	
Benefit	60% to max \$1,000
Elimination Period	
Illness	7 Days
Injury	7 Days
Duration of Benefits	90 Days
Definition of Earnings	Basic Annual Earning
Total and Partial Disability	Partial: Included
Recurrent Disability Provision	90 Days
Pre-Existing Condition Limitation	3/3/2012
<b>COST ANALYSIS</b>	
Voluntary Rates	MARKET OPTION 1
Age Range	
0 - 19	\$0.640
20 - 24	\$0.640
25 - 29	\$1.040
30 - 34	\$0.920
35 - 39	\$0.660
40 - 44	\$0.490
45 - 49	\$0.420
50 - 54	\$0.510
55 - 59	\$0.620
60 - 64	\$0.740
65 - 69	\$0.800
70 - 74	\$0.800
75 - 79	\$0.800
80+	\$0.800
<b>PLAN PROVISIONS</b>	
Rate Guarantee	2 Year rate guarantee ending 3/31/2028
Required Participation	15%

## Contributions & Timeline



# Employer Contribution Strategy: Status Quo



## Current Plan Design - Assumes Same Employer Contribution Percentage

Coverage Tier	Lives	CURRENT					RENEWAL					EE Difference \$ΔEE / %Δ ER		
		Monthly Premium Amount	EE Monthly Contribution	EE Semi Monthly Contribution	ER Monthly Contribution	ER Monthly Percentage	Lives	Monthly Premium Amount	EE Monthly Contribution	EE Semi Monthly Contribution	ER Monthly Contribution		ER Monthly Percentage	
<b>DQ1F / H9</b>							<b>EIUQ MOD / H9</b>							
Employee Only:	125	\$1,060.70	\$0.00	\$0.00	\$1,060.70	100%	125	\$1,262.23	\$0.00	\$0.00	\$1,262.23	100%	\$0.00	0%
Employee + Spouse:	26	\$2,333.55	\$107.37	\$53.69	\$2,226.18	95%	26	\$2,776.92	\$127.78	\$63.89	\$2,649.14	95%	\$20.40	0%
Employee + Children:	59	\$2,015.33	\$100.77	\$50.38	\$1,914.56	95%	59	\$2,398.24	\$119.91	\$59.96	\$2,278.33	95%	\$19.15	0%
Employee + Family:	33	\$3,532.15	\$247.25	\$123.63	\$3,284.90	93%	33	\$4,203.35	\$294.23	\$147.12	\$3,909.12	93%	\$46.98	0%
<b>TOTAL</b>	<b>243</b>	<b>\$428,725</b>	<b>\$16,896</b>	<b>\$8,448</b>	<b>\$411,829</b>	<b>96%</b>	<b>243</b>	<b>\$510,185</b>	<b>\$20,107</b>	<b>\$10,053</b>	<b>\$490,079</b>	<b>96%</b>		
<b>DQ1F / H9 TOBACCO</b>							<b>EIUQ MOD / H9 TOBACCO</b>							
Employee Only:		\$1,060.70	\$50.00	\$25.00	\$1,010.70	95%	0	\$1,262.23	\$50.00	\$25.00	\$1,212.23	96%	\$0.00	1%
Employee + Spouse:		\$2,333.55	\$140.67	\$70.34	\$2,192.88	94%	0	\$2,776.92	\$177.78	\$88.89	\$2,599.14	94%	\$37.11	0%
Employee + Children:		\$2,015.33	\$135.09	\$67.55	\$1,880.24	93%	0	\$2,398.24	\$169.91	\$84.96	\$2,228.33	93%	\$34.82	0%
Employee + Family:		\$3,532.15	\$258.79	\$129.40	\$3,273.36	93%	0	\$4,203.35	\$344.23	\$172.12	\$3,859.12	92%	\$85.44	-1%
<b>TOTAL</b>	<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>		<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>			

	CURRENT	RENEWAL
<b>Total Enrollment</b>	<b>243</b>	<b>243</b>
<b>Per Employee Per Month</b>	<b>\$1,764.30</b>	<b>\$2,099.53</b>
<b>Total Annual Premium</b>	<b>\$5,144,703</b>	<b>\$6,122,225</b>
<b>Total Employee Annual Contributions</b>	<b>\$202,755</b>	<b>\$241,281</b>
<b>Total Annual Premium Paid by Company</b>	<b>\$4,941,948</b>	<b>\$5,880,944</b>
<b>\$ Change in Total Annual Premium</b>		<b>\$977,522</b>
<b>% Change in Total Annual Premium</b>		<b>19%</b>
<b>\$ Change in Employee Annual Contribution</b>		<b>\$38,526</b>
<b>% Change in Employee Annual Contribution</b>		<b>19%</b>
<b>\$ Change in Total Annual Premium Paid by Company</b>		<b>\$938,996</b>
<b>% Change in Total Annual Premium Paid by Company</b>		<b>19%</b>

# Alt. Employer Contribution Strategy: UHC Alt. \$1K-100% Single Option

## Current Plan Design - Assumes Same Employer Contribution Percentage

Coverage Tier	Lives	CURRENT					RENEWAL					EE Difference \$ΔEE / %Δ ER			
		Monthly Premium Amount	EE Monthly Contribution	EE Semi Monthly Contribution	ER Monthly Contribution	ER Monthly Percentage	Lives	Monthly Premium Amount	EE Monthly Contribution	EE Semi Monthly Contribution	ER Monthly Contribution	ER Monthly Percentage			
<b>DQ1F / H9</b>							<b>EIVJ/ H9</b>								
Employee Only:	125	\$1,060.70	\$0.00	\$0.00	\$1,060.70	100%	125	\$1,186.70	\$0.00	\$0.00	\$1,186.70	100%	\$0.00	0%	
Employee + Spouse:	26	\$2,333.55	\$107.37	\$53.69	\$2,226.18	95%	26	\$2,610.75	\$120.13	\$60.06	\$2,490.62	95%	\$12.75	0%	
Employee + Children:	59	\$2,015.33	\$100.77	\$50.38	\$1,914.56	95%	59	\$2,254.73	\$112.74	\$56.37	\$2,141.99	95%	\$11.97	0%	
Employee + Family:	33	\$3,532.15	\$247.25	\$123.63	\$3,284.90	93%	33	\$3,951.73	\$276.62	\$138.31	\$3,675.11	93%	\$29.37	0%	
<b>TOTAL</b>	<b>243</b>	<b>\$428,725</b>	<b>\$16,896</b>	<b>\$8,448</b>	<b>\$411,829</b>	<b>96%</b>	<b>243</b>	<b>\$479,653</b>	<b>\$18,903</b>	<b>\$9,452</b>	<b>\$460,750</b>	<b>96%</b>			
<b>DQ1F / H9 TOBACCO</b>							<b>EIVJ/ H9 TOBACCO</b>								
Employee Only:		\$1,060.70	\$50.00	\$25.00	\$1,010.70	95%	0	\$1,186.70	\$50.00	\$25.00	\$1,136.70	96%	\$0.00	1%	
Employee + Spouse:		\$2,333.55	\$140.67	\$70.34	\$2,192.88	94%	0	\$2,610.75	\$170.13	\$85.06	\$2,440.62	93%	\$29.46	0%	
Employee + Children:		\$2,015.33	\$135.09	\$67.55	\$1,880.24	93%	0	\$2,254.73	\$162.74	\$81.37	\$2,091.99	93%	\$27.65	-1%	
Employee + Family:		\$3,532.15	\$258.79	\$129.40	\$3,273.36	93%	0	\$3,951.73	\$326.62	\$163.31	\$3,625.11	92%	\$67.83	-1%	
<b>TOTAL</b>	<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>		<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>				

	CURRENT	RENEWAL
Total Enrollment	243	243
Per Employee Per Month	\$1,764.30	\$1,973.88
Total Annual Premium	\$5,144,703	\$5,755,838
Total Employee Annual Contributions	\$202,755	\$226,840
Total Annual Premium Paid by Company	\$4,941,948	\$5,528,998
\$ Change in Total Annual Premium		\$611,135
% Change in Total Annual Premium		12%
\$ Change in Employee Annual Contribution		\$24,085
% Change in Employee Annual Contribution		12%
\$ Change in Total Annual Premium Paid by Company		\$587,050
% Change in Total Annual Premium Paid by Company		12%

# Renewal Timeline

Activity	Responsibility	Timeframe
<b>Strategic Planning Meeting</b>	<b>Gallagher / HACA</b>	<b>10/29</b>
Request census (including COBRA participants)	Gallagher	11/3
Receive census	HACA	11/10
Prepare marketing specifications for marketplace	Gallagher	Mid November
Release marketing specs to marketplace	Gallagher	Late November
Receive renewals from current carriers	Carriers	Late November
Proposals from all carriers - final due date	Carriers	Mid December
Analyze and negotiate proposals & renewals with carriers	Gallagher / Carriers	Late December/Early January
Develop recommendations based on findings and evaluation of benefits	Gallagher	Early/Mid January
<b>Renewal Meeting - Make decisions for 2026</b>	<b>Gallagher &amp; HACA</b>	<b>1/16</b>
Final Decision Needed	HACA	Early February
Develop, Review & Finalize Employee Benefits Communication	Gallagher / HACA	2/2-2/16
Conduct enrollment meetings / Distribution of all materials to employees	Gallagher / HACA	2/24 & 2/25
Open Enrollment period	HACA	2/24- 3/6
Enrollment Completed	HACA	3/9
Carrier set-up / Implementation of new vendors or plans	Gallagher / HACA / Carriers	Mid March
Submit enrollment	HACA	Mid March
System confirmation of benefits and billing set up	Gallagher & HACA	Mid March
ID cards produced and delivered to employees	Carriers	End of March
<b>2026 Benefit Plan Year Begins!</b>	<b>HACA</b>	<b>4/1/2026</b>

# Appendix

# Cigna LF Market Options: Dual Plan Options

				CURRENT	Market OPTION 1		Market OPTION 2		Market OPTION 3		
Carrier Name				UnitedHealthcare	Cigna		Cigna		Cigna		
Plan Name				DQ1F MOD / H9	Base HSA (38262747)	OAPIN Alt 4 (38262788)	Base OAP (38262746)	OAPIN Alt 5 (38262788)	Base OAP (38262746)	OAPIN Alt 3 (38262779)	
<b>PLAN DESIGN*</b>											
<b>In-Network Benefits</b>				HSA Open Access Plus	Open Access Plus	Open Access Plus	Open Access Plus	Open Access Plus	Open Access Plus	Open Access Plus	
<b>Deductible Type</b>				Embedded	Embedded	Embedded	Embedded	Embedded	Embedded	Embedded	
<b>Calendar Year (CY) Deductible (Individual / Family)</b>				\$500 / \$1,000	\$3,500 / \$7,000	\$1,000 / \$2,000	\$3,000 / \$6,000	\$1,000 / \$2,000	\$3,000 / \$6,000	\$2,000 / \$4,000	
<b>Out-of-Pocket Max Type</b>				Embedded	Embedded	Embedded	Embedded	Embedded	Embedded	Embedded	
<b>CY Out-of-Pocket Max (Individual / Family)</b>				\$2,000 / \$4,000	\$6,350 / \$12,700	\$4,000 / \$8,000	\$6,000 / \$12,000	\$4,000 / \$8,000	\$6,000 / \$12,000	\$5,000 / \$10,000	
<b>Coinsurance (member pays after deductible)</b>				0%	20%	20%	0%	20%	0%	0%	
<b>Preventive Care</b>				Covered 100%	Covered 100%	Covered 100%	Covered 100%	Covered 100%	Covered 100%	Covered 100%	
<b>Primary Care Visit</b>				\$25 Copay (Under age 19: Covered 100%)	20% after deductible	\$10 Copay	\$10 Copay	\$10 Copay	\$10 Copay	\$10 Copay	
<b>Specialist Visit</b>				\$50 Copay	20% after deductible	\$60 Copay	\$60 Copay	\$60 Copay	\$60 Copay	\$60 Copay	
<b>Urgent Care</b>				\$75 Copay	20% after deductible	\$25 Copay	\$25 Copay	\$25 Copay	\$25 Copay	\$25 Copay	
<b>Emergency Room</b>				\$300 Copay	20% after deductible	\$500 Copay	\$500 Copay	\$500 Copay	\$500 Copay	\$500 Copay	
<b>Inpatient Hospital</b>				0% after deductible	20% after deductible	20% after deductible	0% after deductible	20% after deductible	0% after deductible	0% after deductible	
<b>Outpatient Surgery</b>				0% after deductible	20% after deductible	20% after deductible	0% after deductible	20% after deductible	0% after deductible	0% after deductible	
<b>Chiropractic (visit limits may apply)</b>				\$50 Copay (20 visits)	20% after deductible	\$60 Copay	\$60 Copay	\$60 Copay	\$60 Copay	\$60 Copay	
<b>Phys/Occ/Speech Therapy (visit limits may apply)</b>				Outpatient: \$25 Copay; Inpatient: 0% after deductible (Outpatient: 20 visits each; Inpatient: 60 Days)	20% after deductible	\$60 Copay	\$60 Copay	\$60 Copay	\$60 Copay	\$60 Copay	
<b>Diagnostic Test (X-ray, blood work)</b>				Covered 100%	20% after deductible	20% after deductible	0% after deductible	20% after deductible	0% after deductible	0% after deductible	
<b>Imaging (CT/PET scan, MRI)</b>				0% after deductible	20% after deductible	20% after deductible	0% after deductible	20% after deductible	0% after deductible	0% after deductible	
<b>Prescription Drug Benefit</b>											
<b>Retail</b>				31 Days	30 Days	30 Days	30 Days	30 Days	30 Days	30 Days	
<b>Tier I / Tier II / Tier III</b>				\$10 / \$30 / \$50	20% after deductible	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	
<b>Specialty</b>				\$10 / \$30 / \$50	20% after deductible	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	
<b>Mail Order</b>				90 Days	90 Days	90 Days	90 Days	90 Days	90 Days	90 Days	
<b>Tier I / Tier II / Tier III</b>				\$25 / \$75 / \$125	20% after deductible	\$25 / \$75 / \$125	\$25 / \$75 / \$125	\$25 / \$75 / \$125	\$25 / \$75 / \$125	\$25 / \$75 / \$125	
<b>Out-of-Network Benefits</b>											
<b>Deductible Type</b>				N/A	N/A	N/A	N/A	N/A	N/A	N/A	
<b>CY Deductible (Individual / Family)</b>				N/A	N/A	N/A	N/A	N/A	N/A	N/A	
<b>Out-of-Pocket Max Type</b>				N/A	N/A	N/A	N/A	N/A	N/A	N/A	
<b>CY Out-of-Pocket Max (Individual / Family)</b>				N/A	N/A	N/A	N/A	N/A	N/A	N/A	
<b>Coinsurance (member pays after deductible)</b>				N/A	N/A	N/A	N/A	N/A	N/A	N/A	
<b>COST ANALYSIS</b>											
<b>PEPM Rates - Enrollment per Renewal Document</b>				Plan 1	BASE (75%)	BUY-UP (25%)					
				DQ1F MOD / H9	Base HSA (38262747)	OAPIN Alt 4 (38262788)	Base OAP (38262746)	OAPIN Alt 5 (38262788)	Base OAP (38262746)	OAPIN Alt 3 (38262779)	
<b>Employee (EE) Only</b>				125	94	31	\$1,060.70	\$1,028.03	\$1,220.02	\$1,179.16	\$1,218.70
<b>EE + Spouse</b>				26	20	6	\$2,333.55	\$2,261.67	\$2,684.05	\$2,594.16	\$2,595.20
<b>EE + Child(ren)</b>				59	44	15	\$2,015.33	\$1,953.27	\$2,318.03	\$2,240.41	\$2,240.41
<b>EE + Family</b>				33	25	8	\$3,532.15	\$3,423.36	\$4,062.66	\$3,926.62	\$3,926.62
<b>Total Enrollment</b>				243	183	60					
<b>Estimated Monthly Premium</b>				\$428,725	\$313,396	\$121,197	\$359,468	\$118,364	\$359,612	\$119,898	
<b>Estimated Annual Premium</b>				\$5,144,703	\$3,760,753	\$1,454,360	\$4,313,613	\$1,420,365	\$4,315,348	\$1,438,771	
<b>Dollar Difference from Current</b>						\$70,410		\$589,276		\$609,416	
<b>Percent Change from Current</b>						1.4%		11.5%		11.8%	

# BCBS Market Option:

Carrier Name		CURRENT	BCBS MARKET OPTION 1	BCBS MARKET OPTION 2	
Plan Name		UnitedHealthcare DQ1F MOD / H9	BlueCross BlueShield of Texas Blue Essentials HMO \$500 Plan	BlueCross BlueShield of Texas Blue Choice PPO \$500 Plan	
Plan Creditability Status					
PLAN DESIGN*					
In-Network Benefits		Navigate HMO	Blue Essentials HMO	Blue Choice PPO Network	
Deductible Type		Embedded	Embedded	Embedded	
Calendar Year (CY) Deductible (Individual / Family)		\$500 / \$1,000	\$500 / \$1,000	\$500 / \$1,000	
Out-of-Pocket Max Type		Embedded	Embedded	Embedded	
CY Out-of-Pocket Max (Individual / Family)		\$2,000 / \$4,000	\$2,000 / \$4,000	\$2,000 / \$4,000	
Coinsurance (member pays after deductible)		0%	0%	0%	
Preventive Care		Covered 100%	Covered 100%	Covered 100%	
Primary Care Visit		\$25 Copay (Under age 19: Covered 100%)	\$25 Copay	\$25 Copay	
Specialist Visit		\$50 Copay	\$50 Copay	\$50 Copay	
Urgent Care		\$75 Copay	\$75 Copay	\$75 Copay	
Emergency Room		\$300 Copay	ER facility: \$300 Copay then 0% after deductible; (Copay waived if admitted) Emergency care - Physician: 0% after deductible	ER facility: \$300 Copay Emergency care - Physician: 0% after deductible	
Inpatient Hospital		0% after deductible	0% after deductible	0% after deductible	
Outpatient Surgery		0% after deductible	0% after deductible	0% after deductible	
Chiropractic (visit limits may apply)		\$50 Copay (20 visits)	Physician office: PCP: \$25 Copay; SPC: \$50 Copay; Outpatient: 0% after deductible; (Combined 40 Visits (Minimum 35 Visits for FI)	Physician office: PCP: \$25 Copay; SPC: \$50 Copay; Outpatient: 0% after deductible; (Combined 40 Visits (Minimum 35 Visits for FI)	
Phys/Occ/Speech Therapy (visit limits may apply)		Outpatient: \$25 Copay; Inpatient: 0% after deductible (Outpatient: 20 visits each; Inpatient: 60 Days)	PCP: \$25 Copay; SPC: \$50 Copay; Inpatient/ Outpatient: 0% after deductible	Physician office: PCP: \$25 Copay; SPC: \$50 Copay; Outpatient: 0% after deductible; (Combined 40 Visits (Minimum 35 Visits for FI)	
Diagnostic Test (X-ray, blood work)		Covered 100%	0% after deductible	Covered 100%	
Imaging (CT/PET scan, MRI)		0% after deductible	0% after deductible	0% after deductible	
Prescription Drug Benefit					
Retail		31 Days	30 Days	30 Days	
Tier I / Tier II / Tier III		\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	
Specialty		\$10 / \$30 / \$50	\$10 / \$30 / \$50	\$10 / \$30 / \$50	
Mail Order		90 Days	90 Days	90 Days	
Tier I / Tier II / Tier III		\$25 / \$75 / \$125	\$25 / \$75 / \$125	\$25 / \$75 / \$125	
Out-of-Network Benefits					
Deductible Type		N/A	N/A	Embedded	
CY Deductible (Individual / Family)		N/A	N/A	\$1,000 / \$2,000	
Out-of-Pocket Max Type		N/A	N/A	Embedded	
CY Out-of-Pocket Max (Individual / Family)		N/A	N/A	\$4,000 / \$8,000	
Coinsurance (member pays after deductible)		N/A	N/A	30%	
COST ANALYSIS					
PEPM Rates - Enrollment per Renewal Document		Enrollment	DQ1F MOD / H9	Blue Essentials HMO \$500 Plan	Blue Choice PPO \$500 Plan
Employee (EE) Only		125	\$1,060.70	\$1,229.31	\$1,470.99
EE + Spouse		26	\$2,333.55	\$2,704.49	\$3,236.19
EE + Child(ren)		59	\$2,015.33	\$2,335.68	\$2,794.87
EE + Family		33	\$3,532.15	\$4,093.62	\$4,898.42
Total Enrollment		243			
Estimated Monthly Premium			\$428,725	\$496,875	\$594,560
Estimated Annual Premium			\$5,144,703	\$5,962,501	\$7,134,719
Dollar Difference from Current				\$817,798	\$1,990,016
Percent Change from Current				15.9%	38.7%

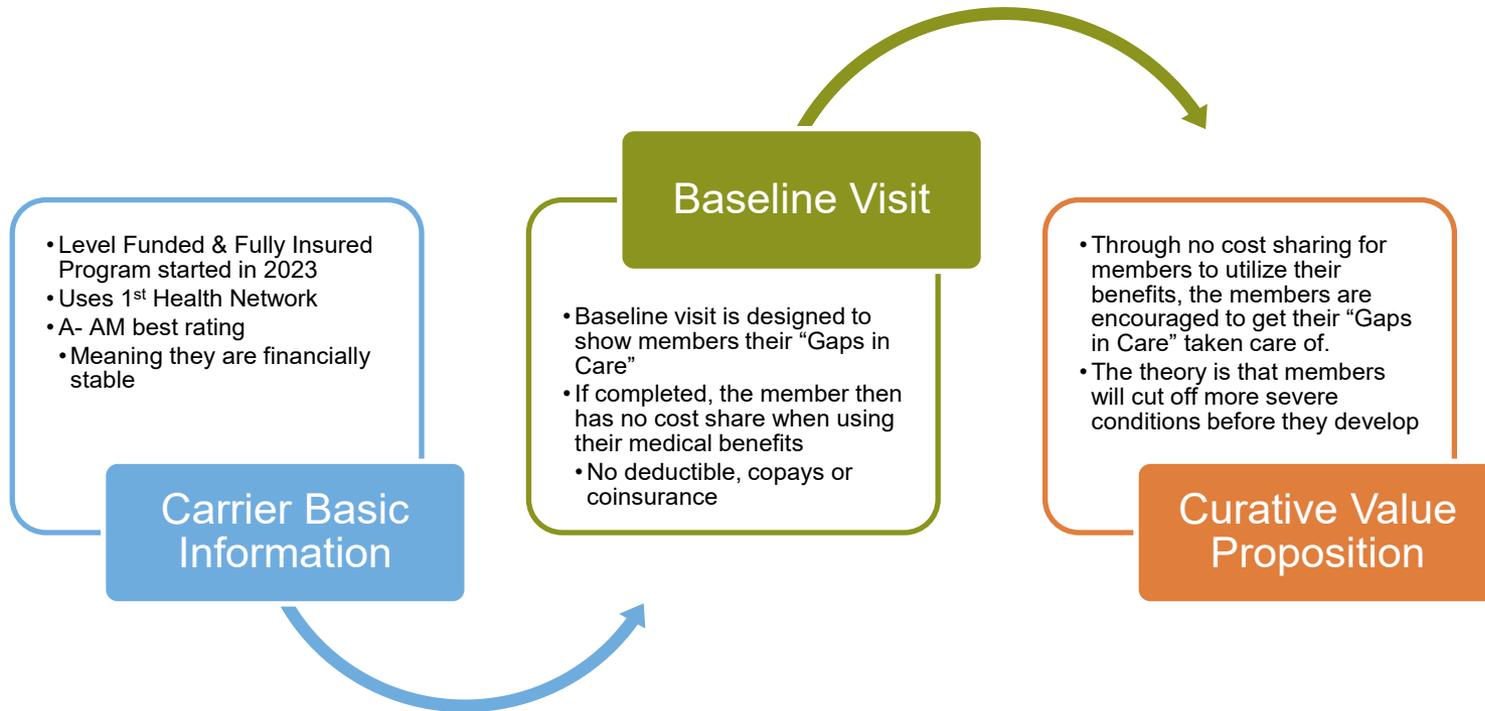
# UHC Alternatives: Dual Plan Option with Surest

Carrier Name				CURRENT	RENEWAL OPTION 1		
UnitedHealthcare				UnitedHealthcare	UnitedHealthcare		
Plan Name				DQ1F MOD / H9	Base: Surest D5500 RXI	Buy-Up: EIXA	
<b>PLAN DESIGN*</b>							
<b>In-Network Benefits</b>					Surest Choice Plus	Choice Plus Network	
<b>Deductible Type</b>				Embedded		Embedded	
<b>Calendar Year (CY) Deductible (Individual / Family)</b>				\$500 / \$1,000	\$0 / \$0	\$3,000 / \$6,000	
<b>Out-of-Pocket Max Type</b>				Embedded	Embedded	Embedded	
<b>CY Out-of-Pocket Max (Individual / Family)</b>				\$2,000 / \$4,000	\$5,500 / \$11,000	\$4,500 / \$9,000	
<b>Coinsurance (member pays after deductible)</b>				0%	0%	0%	
<b>Preventive Care</b>				Covered 100%	Covered 100%	Covered 100%	
<b>Primary Care Visit</b>				\$25 Copay (Under age 19: Covered 100%)	\$25 Copay to \$130 Copay	\$30 Copay (Under age 19: Covered 100%)	
<b>Specialist Visit</b>				\$50 Copay	\$25 Copay to \$130 Copay	Designated Network: \$30 Copay; Network: \$60 Copay	
<b>Urgent Care</b>				\$75 Copay	\$80 Copay	\$50 Copay	
<b>Emergency Room</b>				\$300 Copay	\$850 Copay	\$500 Copay	
<b>Inpatient Hospital</b>				0% after deductible	\$350 Copay to \$3,500 Copay	0% after deductible	
<b>Outpatient Surgery</b>				0% after deductible	\$40 Copay to \$3,500 Copay	0% after deductible	
<b>Chiropractic (visit limits may apply)</b>				\$50 Copay (20 visits)	\$30 Copay (60 visits)	\$30 Copay (20 visits)	
<b>Phys/Occ/Speech Therapy (visit limits may apply)</b>				Outpatient: \$25 Copay; Inpatient: 0% after deductible (Outpatient: 20 visits each; Inpatient: 60 Days)	OT & ST: \$15 Copay to \$115 Copay; PT: \$15 Copay to \$90 Copay (PT & OT: 60 visits; ST: No limits)	Outpatient: \$30 Copay (20 visits); Inpatient: 0% after deductible (60 days)	
<b>Diagnostic Test (X-ray, blood work)</b>				Covered 100%	Covered 100%	Covered 100%	
<b>Imaging (CT/PET scan, MRI)</b>				0% after deductible	\$150 Copay to \$1,050 Copay	0% after deductible	
<b>Prescription Drug Benefit</b>							
<b>Retail</b>				31 Days	30 Days	31 Days	
<b>Tier I / Tier II / Tier III</b>				\$10 / \$30 / \$50	\$10 / \$35 / \$70	\$10 / \$30 / \$50	
<b>Specialty</b>				\$10 / \$30 / \$50	\$10 / \$100 / \$200	\$10 / \$30 / \$50	
<b>Mail Order</b>				90 Days	90 Days	90 Days	
<b>Tier I / Tier II / Tier III</b>				\$25 / \$75 / \$125	\$25 / \$87.50 / \$175	\$25 / \$75 / \$125	
<b>Out-of-Network Benefits</b>							
<b>Deductible Type</b>				N/A		Embedded	
<b>CY Deductible (Individual / Family)</b>				N/A	\$0 / \$0	\$5,000 / \$10,000	
<b>Out-of-Pocket Max Type</b>				N/A	Embedded	Embedded	
<b>CY Out-of-Pocket Max (Individual / Family)</b>				N/A	\$11,000 / \$22,000	\$10,000 / \$20,000	
<b>Coinsurance (member pays after deductible)</b>				N/A	0%	30%	
<b>COST ANALYSIS</b>							
				Est. Enrolled			
<b>PEPM Rates - Enrollment per Renewal Document</b>		Plan 1	BASE (75%)	BUY-UP (25%)	DQ1F MOD / H9	Base: Surest D5500 RXI	Buy-Up EIXA
<b>Employee (EE) Only</b>		125	94	31	\$1,060.70	\$1,206.05	\$1,314.89
<b>EE + Spouse</b>		26	20	6	\$2,333.55	\$2,653.32	\$2,892.77
<b>EE + Child(ren)</b>		59	44	15	\$2,015.33	\$2,291.50	\$2,498.29
<b>EE + Family</b>		33	25	8	\$3,532.15	\$4,016.17	\$4,378.61
<b>Total Enrollment</b>		<b>243</b>	<b>183</b>	<b>60</b>			
<b>Estimated Monthly Premium</b>					\$428,725	\$367,665	\$130,621
<b>Estimated Annual Premium</b>					\$5,144,703	\$4,411,984	\$1,567,457
<b>Dollar Difference from Current</b>						\$834,739	
<b>Percent Change from Current</b>						16.2%	

# Curative Market Option:

		CURRENT	MARKET OPTION	
Carrier Name		UnitedHealthcare	Curative	
Plan Name		DQ1F MOD / H9	PPO Only Plan	
Plan Creditability Status				
PLAN DESIGN*			Single Option	
In-Network Benefits		Navigate HMO	Compliant with Baseline Visit	Non-Compliant with Baseline Visit
Deductible Type		Embedded	Embedded	Embedded
Calendar Year (CY) Deductible (Individual / Family)		\$500 / \$1,000	\$0 / \$0	\$5,000 / \$10,000
Out-of-Pocket Max Type		Embedded		
CY Out-of-Pocket Max (Individual / Family)		\$2,000 / \$4,000	\$0 / \$0	\$7,500 / \$15,000
Coinsurance (member pays after deductible)		0%	0%	20%
Preventive Care		Covered 100%	Covered 100%	Covered 100%
Primary Care Visit		\$25 Copay (Under age 19: Covered 100%)	\$0 Copay	\$25 Copay after deductible
Specialist Visit		\$50 Copay	\$0 Copay	\$50 Copay after deductible
Urgent Care		\$75 Copay	\$0 Copay	20% after deductible
Emergency Room		\$300 Copay	\$0 Copay	20% after deductible
Inpatient Hospital		0% after deductible	\$0 Copay	20% after deductible
Outpatient Surgery		0% after deductible	\$0 Copay	20% after deductible
Chiropractic (visit limits may apply)		\$50 Copay (20 visits)	\$0 Copay	\$25 Copay after deductible
Phys/Occ/Speech Therapy (visit limits may apply)		Outpatient: \$25 Copay; Inpatient: 0% after deductible (Outpatient: 20 visits each; Inpatient: 60 Days)	\$0 Copay	20% after deductible
Diagnostic Test (X-ray, blood work) Imaging (CT/PET scan, MRI)		Covered 100% 0% after deductible	\$0 Copay \$0 Copay	20% after deductible 20% after deductible
Prescription Drug Benefit				
Retail		31 Days	30 Days	30 Days
Tier I / Tier II / Tier III		\$10 / \$30 / \$50	\$0 / \$50 / \$0 / \$50	\$50 / \$100 / \$50 / \$100 after deductible
Specialty		\$10 / \$30 / \$50	Preferred: \$0; Non-Preferred: \$250	Preferred: \$50 after deductible; Non-Preferred: 25% after deductible
Mail Order		90 Days	90 Days	30 - 90 Days
Tier I / Tier II / Tier III		\$25 / \$75 / \$125	\$0 / \$50 / \$0 / \$50	\$50 - \$150 / \$100 - \$300 / \$50 - \$150 / \$100 - \$300 after deductible
Out-of-Network Benefits				
Deductible Type		N/A	Embedded	
CY Deductible (Individual / Family)		N/A	\$10,000 / \$20,000	
Out-of-Pocket Max Type		N/A	Embedded	
CY Out-of-Pocket Max (Individual / Family)		N/A	\$15,000 / \$30,000	
Coinsurance (member pays after deductible)		N/A	50%	
COST ANALYSIS				
PEPM Rates - Enrollment per Renewal Document		Enrollment	DQ1F MOD / H9	PPO Only Plan
Employee (EE) Only		125	\$1,060.70	\$1,168.77
EE + Spouse		26	\$2,333.55	\$2,571.30
EE + Child(ren)		59	\$2,015.33	\$2,220.66
EE + Family		33	\$3,532.15	\$3,892.02
Total Enrollment		243		
Estimated Monthly Premium			\$428,725	\$472,406
Estimated Annual Premium			\$5,144,703	\$5,668,868
Dollar Difference from Current				\$524,165
Percent Change from Current				10.2%

# Curative



**Baseline Visit Statistics**

- 98% compliance with the Baseline visit
- In some groups, participation has increased by 50% due to the no cost sharing

**Financial Stability**

- Curative expects a spike in claims year one while people are addressing their care gaps
- To combat this, they have offered 2<sup>nd</sup> year rate guarantees or rate caps

# Garner Option with UHC: First Dollar H.R.A Program

		CURRENT	GARNER MARKET OPTION 1		GARNER MARKET OPTION 2		GARNER MARKET OPTION 3	
Carrier Name	UnitedHealthcare	Garner		Garner		Garner		
Plan Name	DQ1F MOD / H9	EITQ (ChoicePlus) \$4,500 First Dollar Garner HRA (Not H.S.A Eligible)		E11U (Performance Network) \$4,500 First Dollar Garner HRA		E12F (Performance Network) \$2,500 First Dollar Garner HRA		
Plan Creditability Status								
PLAN DESIGN*								
In-Network Benefits	Navigate HMO	Base	Members Using Garner	Base	Members Using Garner	Base	Members Using Garner	
Deductible Type	Embedded							
Calendar Year (CY) Deductible (Individual / Family)	\$500 / \$1,000	\$5,000 / \$10,000	\$500 / \$1,000	\$5,000 / \$10,000	\$500 / \$1,000	\$3,000 / \$6,000	\$500 / \$1,000	
Out-of-Pocket Max Type CY Out-of-Pocket Max (Individual / Family)	Embedded \$2,000 / \$4,000	\$6,350 / \$12,700	\$1,850 / \$3,700	\$8,150 / \$16,300	\$3,650 / \$7,300	\$8,150 / \$16,300	\$5,650 / \$11,300	
Coinurance (member pays after deductible)	0%	30%	30%	20%	20%	25%	25%	
Preventive Care	Covered 100%							
Primary Care Visit	\$25 Copay (Under age 19: Covered 100%)	30% after deductible	\$0	\$15 Copay	\$0 Copay	\$35 Copay	\$0 Copay	
Specialist Visit	\$50 Copay	30% after deductible	\$0	Designated Network: \$50 Copay In-Network: \$100	\$0 Copay	Designated Network: \$70 Copay In-Network: \$100	\$0 Copay	
Urgent Care	\$75 Copay	30% after deductible	\$0	\$25 Copay	\$0	\$25 Copay	\$0	
Emergency Room	\$300 Copay	30% after deductible	\$0	\$400 POD + 25% after deductible	\$0	\$400 POD + 25% after deductible	\$0	
Inpatient Hospital	0% after deductible	30% after deductible	\$0	20% after deductible	\$0	25% after deductible	\$0	
Outpatient Surgery	0% after deductible	30% after deductible	\$0	20% after deductible	\$0	25% after deductible	\$0	
Chiropractic (visit limits may apply)	\$50 Copay (20 visits)	30% after deductible	\$0	\$15 Copay (20 visits)	\$0 Copay (20 visits)	\$35 Copay (20 visits)	\$0 Copay (20 visits)	
Phys/Occ/Speech Therapy (visit limits may apply)	Outpatient: \$25 Copay; Inpatient: 0% after deductible (Outpatient: 20 visits each; Inpatient: 60 Days)	30% after deductible	\$0	\$15 Copay (20 visits)	\$0 Copay (20 visits)	\$35 Copay (20 visits)	\$0 Copay (20 visits)	
Diagnostic Test (X-ray, blood work) Imaging (CT/PET scan, MRI)	Covered 100% 0% after deductible	30% after deductible 30% after deductible	\$0 \$0	20% after deductible 20% after deductible	\$0 \$0	25% after deductible 25% after deductible	\$0 \$0	
Prescription Drug Benefit Retail Tier I / Tier II / Tier III Specialty	31 Days \$10 / \$30 / \$50 \$10 / \$30 / \$50	31 Days 30% after deductible 30% after deductible	31 Days \$0 \$0	31 Days \$10 / \$30 / \$50 \$10 / \$30 / \$50	31 Days \$0 / \$0 / \$0 \$0 / \$0 / \$0	31 Days \$10 / \$30 / \$50 \$10 / \$30 / \$50	31 Days \$0 / \$0 / \$0 \$0 / \$0 / \$0	
Out-of-Network Benefits								
Deductible Type	N/A	Embedded	Embedded	Embedded	Embedded	Embedded	Embedded	
CY Deductible (Individual / Family)	N/A	\$6,350 / \$12,700	\$6,350 / \$12,700	\$8,150 / \$16,300	\$8,150 / \$16,300	\$8,150 / \$16,300	\$8,150 / \$16,300	
Out-of-Pocket Max Type CY Out-of-Pocket Max (Individual / Family)	N/A	Embedded	Embedded	Embedded	Embedded	Embedded	Embedded	
Coinurance (member pays after deductible)	N/A	\$10,000 / \$20,000	\$10,000 / \$20,000	\$10,000 / \$20,000	\$10,000 / \$20,000	\$10,000 / \$20,000	\$10,000 / \$20,000	
		50%	50%	50%	50%	50%	50%	
COST ANALYSIS								
PEPM Rates - Enrollment per Renewal Document	Enrollment	DQ1F MOD / H9	EITQ (ChoicePlus) \$4,500 First Dollar Garner HRA (Not H.S.A Eligible)	E11U (Performance Network) \$4,500 First Dollar Garner HRA	E12F (Performance Network) \$2,500 First Dollar Garner HRA			
Employee (EE) Only	125	\$1,060.70	\$1,021.66	\$1,141.00	\$1,111.66			
EE + Spouse	26	\$2,333.55	\$2,271.46	\$2,526.41	\$2,446.46			
EE + Child(ren)	59	\$2,015.33	\$1,999.75	\$2,212.30	\$2,128.25			
EE + Family	33	\$3,532.15	\$3,313.86	\$3,723.53	\$3,652.02			
<b>Total Enrollment</b>	<b>243</b>							
Estimated Monthly Premium		\$428,725	\$414,108	\$461,714	\$448,649			
Estimated Annual Premium		\$5,144,703	\$4,969,297	\$5,540,566	\$5,383,786			
Dollar Difference from Current			-\$175,406	\$395,864	\$239,084			
Percent Change from Current			-3.4%	7.7%	4.6%			

# Garner Cost Overview



Enrollment		2025 - 2026	2026 -2027				
		Current	Renewal	\$5,000 UHC	\$5,000 UHC w Garner	\$3,000 UHC	\$3,000 UHC w Garner
Network		Navigate - DQ1F	Navigate - EIUQ	Proformace EI1U	Proformace EI1U	Proformace EI2F	Proformace EI2F
Employee	125	\$1,060.70	\$1,262.33	\$1,047.00	\$1,141.00	\$1,060.66	\$1,111.66
Employee + Spouse	26	\$2,333.55	\$2,776.92	\$2,303.41	\$2,526.41	\$2,333.46	\$2,446.46
Employee + Child(ren)	59	\$2,015.33	\$2,398.24	\$1,989.30	\$2,212.30	\$2,015.25	\$2,128.25
Employee + Family	33	\$3,532.15	\$4,203.35	\$3,486.53	\$3,723.53	\$3,532.02	\$3,652.02
Monthly	243	\$428,725	\$510,185	\$423,188	\$461,714	\$428,709	\$448,649
Annual		\$5,144,703	\$6,122,225	\$5,078,254	\$5,540,566	\$5,144,506	\$5,383,786
Change vs. Current			\$977,522	-\$66,448	<b>\$395,864</b>	-\$977,718	<b>\$239,084</b>
% Change vs Current			19%	-1.3%	<b>7.7%</b>	0%	<b>4.6%</b>

# Garner – A Different Approach

## Pros:

- Remain with UHC and move to the Choice Plus network
- NO referral requirement to see a specialist
- Garner will grandfather members' Primary Care Physicians
  - PCP
  - Mental Health provider
  - Geriatrician
  - OB/GYN
  - Pediatrician
- Under Continuity of Care, providers for treatment of cancer and Endocrinologists will be grandfathered
- Concierge team can help schedule appointments for members. Care Navigator can help steer member to resources provided by employer.
- When a member utilizes Garner-recommended providers
  - Lower out-of-pocket costs
  - Improved employee health outcomes
- Garner provides tools to members to become more efficient utilizers of care that will result in better long-term results.
- Medications prescribed by Garner-recommended provider will be covered at no cost to the member.

## Cons:

- Members will need to pay for services up front and be reimbursed. (Paytient debit card can be utilized to pay for any up-front expenses required with Garner)
- Possible need to change specialists to receive Garner HRA benefit
- Medications must be prescribed by a Garner-recommended provider in order to be covered under Garner at no cost share.

# Alt. Employer Contribution Strategy: UHC Dual Option



Current Plan Design - Assumes Same Employer Contribution Percentage on Base Plan

Coverage Tier	Lives	CURRENT					Lives	RENEWAL					EE Difference \$ΔEE / %Δ ER	
		Monthly Premium Amount	EE Monthly Contribution	EE Semi Monthly Contribution	ER Monthly Contribution	ER Monthly Percentage		Monthly Premium Amount	EE Monthly Contribution	EE Semi Monthly Contribution	ER Monthly Contribution	ER Monthly Percentage		
<b>DQ1F / H9</b>							<b>EIVL / H9</b>							
Employee Only:	125	\$1,060.70	\$0.00	\$0.00	\$1,060.70	100%	94	\$1,097.19	\$0.00	\$0.00	\$1,097.19	100%	\$0.00	0%
Employee + Spouse:	26	\$2,333.55	\$107.37	\$53.69	\$2,226.18	95%	20	\$2,413.83	\$111.07	\$55.53	\$2,302.76	95%	\$3.69	0%
Employee + Children:	59	\$2,015.33	\$100.77	\$50.38	\$1,914.56	95%	44	\$2,084.66	\$104.23	\$52.12	\$1,980.43	95%	\$3.47	0%
Employee + Family:	33	\$3,532.15	\$247.25	\$123.63	\$3,284.90	93%	25	\$3,660.42	\$256.23	\$128.11	\$3,404.19	93%	\$8.98	0%
<b>TOTAL</b>	<b>243</b>	<b>\$428,725</b>	<b>\$16,896</b>	<b>\$8,448</b>	<b>\$411,829</b>	<b>96%</b>		<b>\$334,648</b>	<b>\$13,213</b>	<b>\$6,607</b>	<b>\$321,435</b>	<b>96%</b>		
<b>DQ1F / H9 TOBACCO</b>							<b>EIVL / H9 TOBACCO</b>							
Employee Only:		\$1,060.70	\$50.00	\$25.00	\$1,010.70	95%	0	\$1,097.19	\$50.00	\$25.00	\$1,047.19	95%	\$0.00	0%
Employee + Spouse:		\$2,333.55	\$140.67	\$70.34	\$2,192.88	94%	0	\$2,413.83	\$161.07	\$80.53	\$2,252.76	93%	\$20.40	-1%
Employee + Children:		\$2,015.33	\$135.09	\$67.55	\$1,880.24	93%	0	\$2,084.66	\$154.23	\$77.12	\$1,930.43	93%	\$19.14	-1%
Employee + Family:		\$3,532.15	\$258.79	\$129.40	\$3,273.36	93%	0	\$3,660.42	\$306.23	\$153.11	\$3,354.19	92%	\$47.44	-1%
<b>TOTAL</b>	<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>		<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>			
<b>PLAN 3</b>							<b>EIVJ / H9</b>							
Employee Only:							31	\$1,186.70	\$89.51	\$44.76	\$1,097.19	92%	\$89.51	-8%
Employee + Spouse:							6	\$2,610.75	\$307.99	\$153.99	\$2,302.76	88%	\$200.61	-7%
Employee + Children:							15	\$2,254.73	\$274.30	\$137.15	\$1,980.43	88%	\$173.54	-7%
Employee + Family:							8	\$3,951.73	\$547.54	\$273.77	\$3,404.19	86%	\$300.29	-7%
<b>TOTAL</b>	<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>#DIV/0!</b>	<b>60</b>	<b>\$117,887</b>	<b>\$13,118</b>	<b>\$6,559</b>	<b>\$104,769</b>	<b>89%</b>		
<b>PLAN 4</b>							<b>EIVJ / H9 TOBACCO</b>							
Employee Only:							0	\$1,186.70	\$139.51	\$69.76	\$1,047.19	88%	\$89.51	-7%
Employee + Spouse:							0	\$2,610.75	\$357.99	\$178.99	\$2,252.76	86%	\$217.32	-8%
Employee + Children:							0	\$2,254.73	\$324.30	\$162.15	\$1,930.43	86%	\$189.21	-8%
Employee + Family:							0	\$3,951.73	\$597.54	\$298.77	\$3,354.19	85%	\$338.75	-8%
<b>TOTAL</b>	<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>#DIV/0!</b>	<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>#DIV/0!</b>		

	CURRENT	RENEWAL
Total Enrollment	243	60
Per Employee Per Month	\$1,764.30	\$7,542.25
Total Annual Premium	\$5,144,703	\$5,430,420
Total Employee Annual Contributions	\$202,755	\$315,972
Total Annual Premium Paid by Company	\$4,941,948	\$5,114,448
\$ Change in Total Annual Premium		\$285,717
% Change in Total Annual Premium		6%
\$ Change in Employee Annual Contribution		\$113,217
% Change in Employee Annual Contribution		56%
\$ Change in Total Annual Premium Paid by Company		\$172,500
% Change in Total Annual Premium Paid by Company		3%

# Alt. Employer Contribution Strategy: UHC Alt. PROformance



## Current Plan Design - Assumes Same Employer Contribution Percentage

Coverage Tier	Lives	CURRENT					RENEWAL					EE Difference \$ΔEE / %Δ ER			
		Monthly Premium Amount	EE Monthly Contribution	EE Semi Monthly Contribution	ER Monthly Contribution	ER Monthly Percentage	Lives	Monthly Premium Amount	EE Monthly Contribution	EE Semi Monthly Contribution	ER Monthly Contribution	ER Monthly Percentage			
<b>DQ1F / H9</b>							<b>E11H/ H9</b>								
Employee Only:	125	\$1,060.70	\$0.00	\$0.00	\$1,060.70	100%	125	\$1,213.06	\$0.00	\$0.00	\$1,213.06	100%	\$0.00	0%	
Employee + Spouse:	26	\$2,333.55	\$107.37	\$53.69	\$2,226.18	95%	26	\$2,668.74	\$122.80	\$61.40	\$2,545.94	95%	\$15.42	0%	
Employee + Children:	59	\$2,015.33	\$100.77	\$50.38	\$1,914.56	95%	59	\$2,304.81	\$115.24	\$57.62	\$2,189.57	95%	\$14.47	0%	
Employee + Family:	33	\$3,532.15	\$247.25	\$123.63	\$3,284.90	93%	33	\$4,039.51	\$282.77	\$141.38	\$3,756.74	93%	\$35.52	0%	
<b>TOTAL</b>	<b>243</b>	<b>\$428,725</b>	<b>\$16,896</b>	<b>\$8,448</b>	<b>\$411,829</b>	<b>96%</b>	<b>243</b>	<b>\$490,307</b>	<b>\$19,323</b>	<b>\$9,662</b>	<b>\$470,984</b>	<b>96%</b>			
<b>DQ1F / H9 TOBACCO</b>							<b>E11H/ H9 TOBACCO</b>								
Employee Only:		\$1,060.70	\$50.00	\$25.00	\$1,010.70	95%	0	\$1,213.06	\$50.00	\$25.00	\$1,163.06	96%	\$0.00	1%	
Employee + Spouse:		\$2,333.55	\$140.67	\$70.34	\$2,192.88	94%	0	\$2,668.74	\$172.80	\$86.40	\$2,495.94	94%	\$32.13	0%	
Employee + Children:		\$2,015.33	\$135.09	\$67.55	\$1,880.24	93%	0	\$2,304.81	\$165.24	\$82.62	\$2,139.57	93%	\$30.15	0%	
Employee + Family:		\$3,532.15	\$258.79	\$129.40	\$3,273.36	93%	0	\$4,039.51	\$332.77	\$166.38	\$3,706.74	92%	\$73.98	-1%	
<b>TOTAL</b>	<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>		<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>				

	CURRENT	RENEWAL
Total Enrollment	243	243
Per Employee Per Month	\$1,764.30	\$2,017.73
Total Annual Premium	\$5,144,703	\$5,883,688
Total Employee Annual Contributions	\$202,755	\$231,878
Total Annual Premium Paid by Company	\$4,941,948	\$5,651,810
\$ Change in Total Annual Premium		\$738,986
% Change in Total Annual Premium		14%
\$ Change in Employee Annual Contribution		\$29,124
% Change in Employee Annual Contribution		14%
\$ Change in Total Annual Premium Paid by Company		\$709,862
% Change in Total Annual Premium Paid by Company		14%

# Alt. Employer Contribution Strategy: Cigna Single Option



## Current Plan Design - Assumes Same Employer Contribution Percentage

Coverage Tier	Lives	CURRENT					RENEWAL					EE Difference \$ΔEE / %Δ ER			
		Monthly Premium Amount	EE Monthly Contribution	EE Semi Monthly Contribution	ER Monthly Contribution	ER Monthly Percentage	Lives	Monthly Premium Amount	EE Monthly Contribution	EE Semi Monthly Contribution	ER Monthly Contribution	ER Monthly Percentage			
<b>DQ1F / H9</b>							<b>Cigna</b>								
Employee Only:	125	\$1,060.70	\$0.00	\$0.00	\$1,060.70	100%	125	\$1,214.52	\$0.00	\$0.00	\$1,214.52	100%	\$0.00	0%	
Employee + Spouse:	26	\$2,333.55	\$107.37	\$53.69	\$2,226.18	95%	26	\$2,671.92	\$122.94	\$61.47	\$2,548.98	95%	\$15.57	0%	
Employee + Children:	59	\$2,015.33	\$100.77	\$50.38	\$1,914.56	95%	59	\$2,307.56	\$115.38	\$57.69	\$2,192.18	95%	\$14.61	0%	
Employee + Family:	33	\$3,532.15	\$247.25	\$123.63	\$3,284.90	93%	33	\$4,044.32	\$283.10	\$141.55	\$3,761.22	93%	\$35.85	0%	
<b>TOTAL</b>	<b>243</b>	<b>\$428,725</b>	<b>\$16,896</b>	<b>\$8,448</b>	<b>\$411,829</b>	<b>96%</b>	<b>243</b>	<b>\$490,894</b>	<b>\$19,346</b>	<b>\$9,673</b>	<b>\$471,547</b>	<b>96%</b>			
<b>DQ1F / H9 TOBACCO</b>							<b>Cigna TOBACCO</b>								
Employee Only:		\$1,060.70	\$50.00	\$25.00	\$1,010.70	95%	0	\$1,214.52	\$50.00	\$25.00	\$1,164.52	96%	\$0.00	1%	
Employee + Spouse:		\$2,333.55	\$140.67	\$70.34	\$2,192.88	94%	0	\$2,671.92	\$172.94	\$86.47	\$2,498.98	94%	\$32.27	0%	
Employee + Children:		\$2,015.33	\$135.09	\$67.55	\$1,880.24	93%	0	\$2,307.56	\$165.38	\$82.69	\$2,142.18	93%	\$30.29	0%	
Employee + Family:		\$3,532.15	\$258.79	\$129.40	\$3,273.36	93%	0	\$4,044.32	\$333.10	\$166.55	\$3,711.22	92%	\$74.31	-1%	
<b>TOTAL</b>	<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>		<b>0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>				

	CURRENT	RENEWAL
Total Enrollment	243	243
Per Employee Per Month	\$1,764.30	\$2,020.14
Total Annual Premium	\$5,144,703	\$5,890,722
Total Employee Annual Contributions	\$202,755	\$232,155
Total Annual Premium Paid by Company	\$4,941,948	\$5,658,567
\$ Change in Total Annual Premium		\$746,020
% Change in Total Annual Premium		15%
\$ Change in Employee Annual Contribution		\$29,400
% Change in Employee Annual Contribution		15%
\$ Change in Total Annual Premium Paid by Company		\$716,620
% Change in Total Annual Premium Paid by Company		15%

# Disclaimers



# General Disclaimers

## **Coverage Disclaimer**

*This proposal is an outline of the coverages proposed by the carrier(s) based upon the information provided by your company. It does not include all the terms, coverages, exclusions, limitations, and conditions of the actual contract language. See the policies and contracts for actual language. This proposal is not a contract and offers no contractual obligation on behalf of GBS. Policy forms for your reference will be made available upon request.*

## **Renewal / Financial Disclaimer**

*This analysis is for illustrative purposes only, and is not a proposal for coverage or a guarantee of future expenses, claims costs, managed care savings, etc. There are many variables that can affect future health care costs including utilization patterns, catastrophic claims, changes in plan design, health care trend increases, etc. This analysis does not amend, extend, or alter the coverage provided by the actual insurance policies and contracts. See your policy or contact us for specific information or further details in this regard.*

## **Legal**

*The intent of this analysis is to provide you with general information regarding the status of, and/or potential concerns related to, your current employee benefits environment. It should not be construed as, nor is it intended to provide, legal advice. Laws may be complex and subject to change. This information is based on current interpretation of the law and is not guaranteed. Questions regarding specific issues should be addressed by legal counsel who specializes in this practice area.*

# Compensation and Solvency

Health Lines of Coverage: Including Medical, Dental, Vision and EAPs				
Line of Coverage	Carrier Name	Response	Rate Guarantee	Commission
Medical	UnitedHealthcare	Current	1 Year	2%
Dental	UnitedHealthcare	Current	1 Year	10%
Vision	UnitedHealthcare	Current	2 Year	10%

*While Gallagher does not guarantee the financial viability of any health insurance carrier or market, it is an area we recommend that clients closely scrutinize when selecting a health insurance carrier. There are a number of rating agencies that can be referred to including, A.M. Best, Fitch, Moody's, Standard & Poor's, and Weiss Ratings (TheStreet.com). Generally, agencies that provide ratings of Health Insurers, including traditional insurance companies and other managed care organizations, reflect their opinion based on a comprehensive quantitative and qualitative evaluation of a company's financial strength, operating performance and market profile. However, these ratings are not a warranty of an insurer's current or future ability to meet its contractual obligations.*

# Compensation and Solvency

Non-Health Lines of Coverage					
Line of Coverage	Carrier Name	Response	**AM Best Rating	Rate Guarantee	Commission
Basic Life and AD&D	The Hartford	Current	A+	2 Year	10%
Voluntary Life and AD&D	The Hartford	Current	A+	2 Year	10%
Long Term Disability	The Hartford	Current	A+	2 Year	10%

<b>**A.M. Best Rating</b>	
Required Standards for Gallagher Benefit Services	
Group 1 A - to A++	Recommended
Group 2 B + to B ++ and/or financial rating under "VI", or any of Best's "NR" group. This would apply to Best's "A- or higher" rated companies with a financial size under "VI".	Acceptable with signed client acknowledgement letter

Financial Strength Ratings	
Secure	Vulnerable
A++, A+ (Superior)	B, B - (Fair)
A, A -, A U (Excellent)	C++, C+ (Marginal)
B++, B+ (Very Good)	C, C - (Weak)

Supplemental Compensation
<p><i>Gallagher may receive supplemental compensation from insurance carriers and vendors, normally calculated at the end of each calendar year, that are contingent on a number of factors including the overall number of employer plans represented, plan retention rates, and overall premium growth. Historically, supplemental compensation has ranged, on average, between 0-3% based on specific carrier programs. These plans have no effect on premiums. Further, Gallagher may receive non-cash compensation from plan vendors or service providers that are not in connection with any particular client. If you have any questions regarding direct or indirect compensation received by Gallagher, please contact your dedicated Gallagher advisor or refer to the Gallagher Global Standards of Business Conduct (<a href="https://www.ajg.com/us/about-us/global-standards">https://www.ajg.com/us/about-us/global-standards</a>).</i></p>

# Thank You!

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## Gallagher

Insurance | Risk Management | Consulting



# HOUSING AUTHORITY OF THE CITY OF AUSTIN

## BOARD ACTION REQUEST

### **RAD ITEM 7.**

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**MEETING DATE:** February 19, 2026  
**STAFF CONTACT:** Ann Gass  
**ITEM TITLE:** Presentation, Discussion, and Possible Action regarding Resolution No. 02938: Approval by the Board of Commissioners of the Housing Authority of the City of Austin (the “Authority”) authorizing the Authority to take such actions necessary or convenient to facilitate the development of the Pathways at Santa Rita Courts East (the “Project”)  
**BUDGETED ITEM:** N/A  
**TOTAL COST:** N/A

### **ACTION**

The Board is being asked to approve a resolution authorizing the Authority to take such actions necessary or convenient to facilitate the development of the Pathways at Santa Rita Courts East (the “Project”).

### **SUMMARY**

**Background:**

In July 2025, the Texas Department of Housing and Community Affairs awarded 9% low income housing tax credits for the development of 96 units at Pathways at Santa Rita Courts West. In the coming year, AAHC expects to submit another application for tax credits to pursue the redevelopment of the other portion of the site - Pathways at Santa Rita Courts East.

**Process:**

These actions require the current Pathways at Santa Rita Courts to be divided into two projects and each ownership entity to enter into a ground lease with the Housing Authority of the City of Austin. This is being done now, prior to the main closing, in order to meet the deadline imposed as part of the 9% tax credit award for Pathways at Santa Rita Courts West for the project owner to demonstrate legal authority over the project site. As part of the bifurcation of the original site into two parcels, the existing HAP contract will be partially assigned to each of the new partnerships upon receipt of approval from HUD. In addition, HACA is extending seller financing to the East partnership equal to the value of the land and improvements being acquired, and may extend additional funds in advance of the full financial closing.

**Staff Recommendation:**

Staff recommends approval of the resolution.

**ATTACHMENTS:**

None

**RESOLUTION NO. 02938**

A Resolution by the Board of Commissioners of the Housing Authority of the City of Austin (the “Authority”) authorizing the Authority to take such actions necessary or convenient to facilitate the development of the Pathways at Santa Rita Courts East (the “Project”).

**WHEREAS**, the Authority owns the site on which the Project will be developed (the “Land”);

**WHEREAS**, the Authority and Pathways at Santa Rita Courts East, LP, a Texas limited partnership (the “Partnership”), desire to enter into a ground lease (the “Ground Lease”) granting site control of the Land to the Partnership;

**WHEREAS**, the Authority shall transfer title to all improvements to be redeveloped to the Partnership pursuant to a bill of sale;

**WHEREAS**, pursuant to the terms of the Ground Lease, the Partnership is required to develop the Project as a development dedicated for low-income persons in compliance with the laws and regulations applicable to eligible tenants under the federal low-income housing tax credit program as established at 26 U.S.C. §42 and regulations promulgated pursuant thereto;

**WHEREAS**, the Authority enter into a seller loan with the Partnership in an amount not to exceed \$4,000,000 to facilitate the development of the Project; and

**NOW, THEREFORE**, in connection with the pre-development of the Project, the Board of Commissioners hereby adopt the following resolutions:

**BE IT RESOLVED**, that any officer of the Authority (the “Executing Officer”), acting alone, is hereby authorized to review, approve and execute all certificates, affidavits, agreements, documents and other writings (collectively the “Agreements”) the Executing Officer shall deem to be necessary or desirable in the consummation of the transactions herein contemplated;

**BE IT FURTHER RESOLVED**, that all acts, transactions, or agreements undertaken prior hereto by the Executing Officer of the Authority, in connection with the foregoing matters are hereby ratified and confirmed as the valid actions of the Authority, effective as of the date such actions were taken; and

**BE IT FURTHER RESOLVED**, that the Executing Officer is hereby authorized and directed for and on behalf of, and as the act and deed of the Authority, to take such further action in the consummation of the transactions herein contemplated and to do any and all other acts and things necessary or proper in furtherance thereof, as the Executing Officer shall deem to be necessary or desirable, and all acts heretofore taken by the designee of the Executing Officer to such end are hereby expressly ratified and confirmed as the acts and deeds of the Authority.

This resolution shall be in full force and effect from and upon its adoption.

**PASSED, APPROVED AND ADOPTED** this 19th day of February, 2026.

*[End of Resolution.]*

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Michael G. Gerber, Secretary

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Carl S. Richie, Jr., Chairperson



# HOUSING AUTHORITY OF THE CITY OF AUSTIN

## BOARD ACTION REQUEST

### **RAD ITEM 8.**

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**MEETING DATE:** February 19, 2026  
**STAFF CONTACT:** Ann Gass  
**ITEM TITLE:** Presentation, Discussion, and Possible Action regarding Resolution No. 02939: Approval by the Board of Commissioners of the Housing Authority of the City of Austin (the "Authority") authorizing the Authority to take such actions necessary or convenient to facilitate the development of the Pathways at Santa Rita Courts West (the "Project")  
**BUDGETED ITEM:** N/A  
**TOTAL COST:** N/A

### **ACTION**

The Board is being asked to approve a resolution authorizing the Authority to take such actions necessary or convenient to facilitate the development of the Pathways at Santa Rita Courts West (the "Project").

### **SUMMARY**

**Background:**

In July 2025, the Texas Department of Housing and Community Affairs awarded 9% low income housing tax credits for the development of 96 units at Pathways at Santa Rita Courts West.

**Process:**

Pursuant to the requirements of that award, the partnership committed to demonstrating legal authority over the project site through a ground lease from the Housing Authority of the City of Austin (HACA) to Pathways at Santa Rita Courts West, LP. This resolution allows HACA to take the necessary action to enter into that ground lease. As part of the bifurcation of the original site into two parcels, the existing Housing Assistance Payments (HAP) contract will be partially assigned to each of the new partnerships upon receipt of approval from HUD. In addition, HACA is extending seller financing to the West partnership equal to the value of the land and improvements being acquired, and may extend additional funds in advance of the full financial closing.

**Staff Recommendation:**

Staff recommends approval of the resolution.

**ATTACHMENTS:**

None

**RESOLUTION NO.**

**A Resolution by the Board of Commissioners of the Housing Authority of the City of Austin (the “Authority”) authorizing the Authority to take such actions necessary or convenient to facilitate the development of the Pathways at Santa Rita Courts West (the “Project”)**

**WHEREAS**, the Authority owns the site on which the Project will be developed (the “Land”);

**WHEREAS**, the Authority and Pathways at Santa Rita Courts West, LP, a Texas limited partnership (the “Partnership”), desire to enter into a ground lease (the “Ground Lease”) granting site control of the Land to the Partnership;

**WHEREAS**, the Authority shall transfer title to all improvements to be redeveloped to the Partnership pursuant to a bill of sale; and

**WHEREAS**, pursuant to the terms of the Ground Lease, the Partnership is required to develop the Project as a development dedicated for low-income persons in compliance with the laws and regulations applicable to eligible tenants under the federal low-income housing tax credit program as established at 26 U.S.C. §42 and regulations promulgated pursuant thereto; and

**WHEREAS**, the Authority shall enter into a seller loan with the Partnership in an amount not to exceed \$3,000,000 to facilitate the development of the Project; and

**NOW, THEREFORE**, in connection with the pre-development of the Project, the Board of Commissioners hereby adopts the following resolutions:

**BE IT RESOLVED**, that any officer of the Authority (the “Executing Officer”), acting alone, is hereby authorized to review, approve and execute all certificates, affidavits, agreements, documents and other writings (collectively the “Agreements”) the Executing Officer shall deem to be necessary or desirable in the consummation of the transactions herein contemplated;

**BE IT FURTHER RESOLVED**, that all acts, transactions, or agreements undertaken prior hereto by the Executing Officer of the Authority, in connection with the foregoing matters are hereby ratified and confirmed as the valid actions of the Authority, effective as of the date such actions were taken; and

**BE IT FURTHER RESOLVED**, that the Executing Officer is hereby authorized and directed for and on behalf of, and as the act and deed of the Authority, to take such further action in the consummation of the transactions herein contemplated and to do any and all other acts and things necessary or proper in furtherance thereof, as the Executing Officer shall deem to be necessary or desirable, and all acts heretofore taken by the designee of the Executing Officer to such end are hereby expressly ratified and confirmed as the acts and deeds of the Authority.

This resolution shall be in full force and effect from and upon its adoption.

**PASSED, APPROVED AND ADOPTED** this 19th day of February, 2026.

*[End of Resolution.]*

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Michael G. Gerber, Secretary

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Carl S. Richie, Jr., Chairperson