



GOVERNMENT OF BERMUDA
NON-MINISTRY

PATI Information Statement

Name of Public Authority: BERMUDA HOUSING TRUST

Introduction:

The Bermuda Housing Trust ("the Trust") embraces the general purpose of the Public Access to Information Act 2010 ("PATI Act") which is as set out in Section 2 of the Act, namely to:-

- (a) give the public the right to obtain access to information held by public authorities (of which the Trust has been deemed to be one) to the greatest extent possible, subject to exceptions that are in the public interest or (and this is particularly relevant for the Trust) for the protection of the rights of others.
- (b) increase transparency, and eliminate unnecessary secrecy, with regard to information held by a public authority.
- (c) increase accountability.
- (d) inform the general public about the activities of the Trust, including the manner in which the Trust makes decisions; and
- (e) have more information placed in the public domain as a matter of routine.

The Trust was established by statute, namely the Bermuda Housing Trust Act 1965 ("the Act").

The Trust consists of not more than eleven trustees and not less than seven who are appointed by the Governor: Section 2(2) of the Act. However, in the exercise of that power to appoint the Governor shall act on the advice of the government minister responsible for housing: Section 2(9) of the Act.

The statutory mandate of the Trust is "to initiate and administer one or more schemes for the relief of poverty, suffering and misfortune among elderly persons in Bermuda by the provision of accommodation for such persons on favorable terms" — Section 3 of the Act.

This has been interpreted over the years to mean that the Trust provides rental accommodation for seniors in need (men and women over the age of 65 years) who are capable of living on their own and to provide those homes on favorable terms, which includes setting the rents at the lowest possible rates.

The Trust currently manages homes at five different properties through the island: Heydon Trust in Sandys. Dr. Cann Park in Southampton, Elizabeth Hills in Pembroke, Purvis Park in Paget and Ferguson Park in Southside, St. George's. They total approximately 180 units.

The Trust has always endeavored to operate on a balanced budget from year to year and does not rely on or receive an annual grant from the Government. It also has the statutory power to fundraise as well as receive gifts and bequests — Section 4 of the Act

Classes of Information not generally included:

While the Trust is committed to disclosing information in compliance with the PATI Act, given the nature of our work, there are also compelling reasons to protect certain types of information. The following categories of information/documents will not be accessible. The need to protect the confidentiality and privacy of our client tenants is paramount and generally the potential harm caused by disclosure outweighs the benefit to be derived from accessibility. Those documents include but are not necessarily limited to: -

Employee personnel information.

Tenant financial information.

Tenants' personal files and any social and/or medical reports concerning tenants.

Matters before the Courts or likely to go before the Courts.

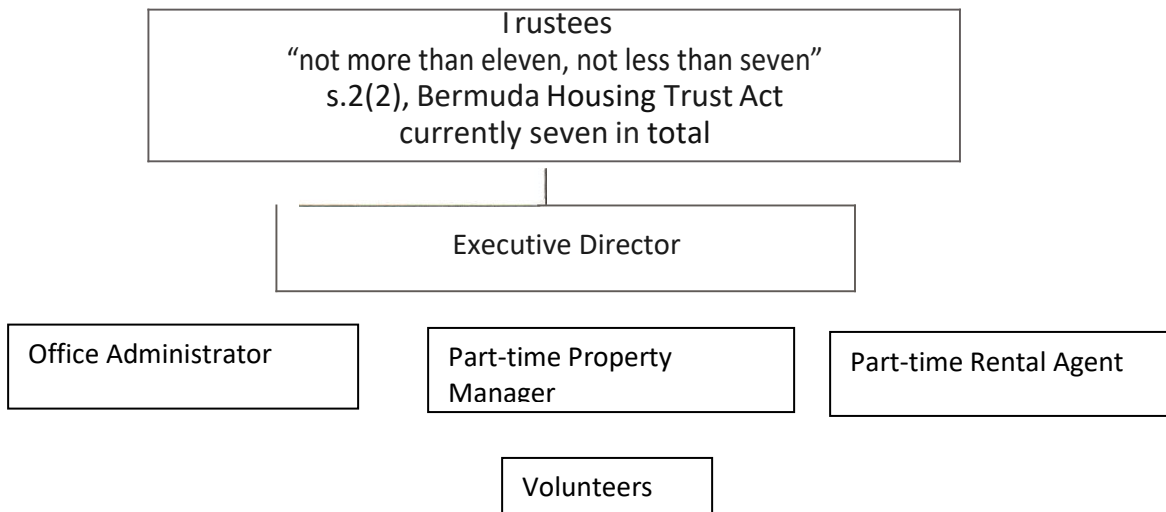
Contact information:

Bermuda Housing Trust 22 Church Street, Washington Lane Hamilton, HM12 Bermuda	Bermuda Housing Trust P.O. Box HM1875 Hamilton, HMHX Bermuda
Hours of Operation Monday to Friday: 9:00 am to 3:00 pm Telephone: (441) 292-1322	To obtain records please direct request to: Executive Director Bermuda Housing Trust Email: info@housingtrust.bm

Section A Structure, Organization and Legislation [e5(1)a]

BHT ORGANISATION CHART

Bermuda Housing Trust
Organization Chart
January 31,2025



Legislation	<p>The Trust is governed by:-</p> <p>The Bermuda Housing Trust Act 1965</p>
Section B: 1) Functions, powers, duties of the Authority [c5(1)b]	<p>The Trust has but one goal and that is to fulfill its statutory mandate of assisting seniors in need by providing them with accommodation on favorable terms.</p> <p>The Trust has one full-time employee who fulfills the role of Office Administrator and whose job it is to assist the Executive Director, to meet that goal.</p> <p>The Trust has three part-time employees who provide the necessary back-up for the Office Administrator, for instance when the Office Administrator is on holiday, and including the Executive Director, and oversee the property management and assist by conducting regular inspections of the Trust's various properties.</p> <p>Decision-making</p> <p>The Trust's decision-making body consists of the trustees appointed under the Act. They currently number seven. There is a Chairman (John Barritt) and Deputy Chairman (Rochelle Simons). The other members are: Anthony Mouchette, Daniel Robinson, Juan Smith and Alexander Abbott and Marco Bortoli.</p> <p>The trustees typically meet at least once every calendar month.</p> <p>There are three sub-committees: finance & maintenance, investment and fundraising. Minutes are kept of the meetings of the trustees and the decisions made at their meetings.</p>
Section B: 2) Obligations under PATIAH [c5(1)bj]	<p>To provide an information statement for the public and promulgate it [s5],</p> <ul style="list-style-type: none"> To provide other information to the public so that the public needs only to have minimum resort to the use of the Act to obtain information [s6]. This includes: <ul style="list-style-type: none"> General information, e.g. activities of the Authority Log of all information requests and their outcome Quarterly expenditure (upon request) [s6(5)] Contracts valued at \$50,000 or more. To respond to information requests in a timely manner [s12-16] To track information requests, and provide this data to the Information Commissioner To respond to requests from the Information Commissioner [s9] To amend personal information held by the Authority that it is wrong or misleading following a written request by the person to whom the information relates [s49], if required To conduct an internal review if formally requested [part 5] To give evidence for review by the Information Commissioner [part 6, 47(4)], or for judicial review [s49], if required To provide an annual written report to the Information Commissioner of the status of information requests [s58 (3)].

<ul style="list-style-type: none"> • To do anything else as required under the PATI Act and subsequent Regulations [s59, 60], including: <ul style="list-style-type: none"> • Fees for Requests for information • Management and maintenance of records • Procedures for administering the Act • To train staff and make arrangements so as to facilitate compliance with the Act [s6 l] • To designate one of its officers to be the person to whom requests are directed [s62]
Section C: Services and Programs [s5(t)c] <hr/> <p>The goal of the Trust is to provide and manage its rental stock in the most efficient and cost-effective manner possible. To this end, the Executive Director is primarily responsible for:</p> <ul style="list-style-type: none"> • General office management: e.g. mail collection, answering the telephone and attending to client tenants and their families who call at the office. • Accounting: Overseeing and maintaining Trust accounts, principally the collection of rents each month, the payment of bills and general preparation of accounts for the annual audit by the Office of the Auditor General. • Property maintenance management: Retention of contractors as and when necessary and the supervision of works undertaken. • Tenant/client relations: This includes receipt of applications for units, award of leases, annual renewals of leases, periodic inspections and liaising with social services e.g. Financial Assistance department of the Bermuda Government, when and where appropriate. <p>In all the above tasks, the Executive Director is assisted by the Office Administrator. part-time employees, trustees and volunteers.</p>
Section D: Records and documents held [s5(1)d] <hr/> <ul style="list-style-type: none"> • Leases and Bi-annual lease renewals • B--Annual Medical Certificate for client/tenants • Client / Tenant applications • Accounting records and audited Financial Statements • Release of Information Consents • Contracts
Section E: Administration (all public access) manuals [s5(t)e] <hr/> <p>Financial Policy and Procedures manual: which covers chiefly procedures and practices for the care and handling of cash and other assets, including any Trust investments, as well as the receipt and deposit of rents; and procedures and guidelines on the award of contracts, purchase of goods and the payment of bills.</p> <p>Tenants Policy and Procedures manual: which covers chiefly procedures and practices to provide simple yet effective methods to address all aspects of resident/tenant management from application for tenancy to tenant exit of the lease/rental agreement.</p>
Section F: Decision-making documents [s5(J)f] <hr/> <ul style="list-style-type: none"> • The Act • Board Minutes: precedents and practices established by Board decisions, some of which are also contained and found in the Office Policy and Procedures i'4annual cited above.

Section G: The Information officer [e5(1)g]

TO OBTAIN RECORDS FROM THE TRUST YOU MUST FIRST DIRECT YOUR REQUESTS TO:

Ms. Chandra Arandjelovic, Executive Director
Bermuda Housing Trust
P. O. Box HXI875
Hamilton HMX

Fax: (441) 292-1792
OR Email: info@housingtrust.bm

Section H: Any Other Information [s5(t)b]

The Trust is not in any way affiliated or connected with the Bermuda Housing Corporation. They are two separate and distinct bodies with two different mandates.

Section I: Any Other Information To be Provided [s5(1)i]

The Trust is audited annually by the Office the Auditor General and those financial statements are tabled in the House of Assembly each year by the Government Minister responsible for Housing for the information and review by members of the Legislature as well as by the general public.

Section J: Information Statement Copies and Updates [e5(2),4,5]

Every public authority shall update its information statement at least once a year, and make it available for inspection by the public at reasonable times by [s5(1-5). PATI Act]:

Date Information Statement was updated: *January 31, 2025*

Locations of Information Statement:

- Our principal office: 22 Church Street, Washington Lane, Hamilton HI 110
- The Bermuda National Library;
e The Bermuda Archives;
- Not available electronically; and
- With the Information Commissioner.

Sign and Date: