

## **Year 4 HUD Agency Plan**

# **MISSOULA HOUSING AUTHORITY**

5 Year Plan for Fiscal Years 2004 - 2008  
Annual Plan for Fiscal Year 2004

**MHAPlan  
Agency Identification**

**PHAName: MISSOULAHOUSINGAUTHORITY**

**PHANumber: MT033**

**PHAFiscalYearBeginning:(mm/yyyy) 10/2003**

**Public Access to Information**

Information regarding any activities outlined in this plan can be obtained by contacting:

**Missoula Housing Authority  
Main Administrative Office  
123534<sup>th</sup> Street  
Missoula, MT 59801**

**Display Locations for MHA Plans and Supporting Documents**

The MHA Plans (including attachments) are available for public inspection at:

**Missoula Housing Authority  
Main Administrative Office  
123534<sup>th</sup> Street  
Missoula, MT 59801**

MHA Plan Supporting Documents are available for inspection at:

**Missoula Housing Authority  
Main Administrative Office  
123534<sup>th</sup> Street  
Missoula, MT 59801**

Assistance for the hearing impaired is available by Relay Service:

VCO1 -877-826-7161  
TTY/ASCII1 -800-253-4091

**5-YEAR PLAN**  
**MHAF ISCAL YEARS 2004 -2008**  
[24CFRPart903.5]

**A.Mission**

The Mission of the Missoula Housing Authority is to provide decent, safe, affordable housing, and to foster among the residents we serve, self-sufficiency, economic independence, upward mobility, and a sense of participation in the economic and political system. (adopted 5/30/96)

**B.Goals** (Please note that *Accomplishments for FY2003* are itemized below in italic type.)

**I. MAXIMIZE QUALITY AND REACH OF MHA AFFORDABLE HOUSING PROGRAMS**

**A. Operate existing housing programs for residents, program participants, and applicants in an efficient, effective, and equitable manner.**

1. Develop quality control systems to assure that resident satisfaction is high and that MHA is delivering maintenance in a cost-effective manner.
  - Started development of a client satisfaction survey to be conducted by Masters Degree Social Work students.
  - Developed a work program for the Maintenance Department to better track work orders so cost-effectiveness can be better measured.
2. Supplement basic staff complement with open purchase contracts for skilled maintenance service to address mismatches in workload and staffing levels.
  - Completed Physical Needs Assessment to assist in development and implementation of preventative maintenance program.
  - Sent staff to procurement training to increase efficiency with contract administration, and receive thorough price estimates.
3. Develop a system of benchmark performance measurements and standards that provides key comparable indicators to the private sector real estate standards. Train existing and new employees to meet benchmarks in general maintenance.
  - In discussion with consultant to help provide those management indicators.
4. Analyze the feasibility of expanded use of private management companies for different components of MHA's portfolio in terms of overall cost effectiveness and complexity of implementation.
5. Structure a portion of MHA's rental housing so that it will serve populations that the private market cannot provide for, including the elderly, disabled, and smaller households.
  - Purchasing Uptown Motel to serve the needs of disabled, homeless single persons (SRO).
  - Currently bidding the design of a project on Reserve Street to provide transitional housing.
  - Purchasing the Joseph Residence to stabilize that location for transitional housing.
  - Applying for \$5 million to build 40 new units for elderly residents.

- Received funding for renewal of 50 Shelter Plus Care units.
  - Applied for funding for renewal of 50 Shelter Plus Care units.
  - Applied for funding for new allocation of 26 new Shelter Plus Care units.
  - Currently working with Abt Associates to create a Missoula City and County Master Plan Portfolio to identify current housing stock, impediments to fair and affordable housing, and investment strategies for future stock.
6. Standardize physical plant, parts and systems to permit easy repairs and quicker response to maintenance needs.
    - Moving towards larger purchases of appliances to be able to standardize the parts.
    - Completing inventory and evaluation of all property to determine replacement needs.
  7. Revise the Housing Quality Standards to increase health and safety requirements that will ensure that Section 8 housing is safe while maintaining a high supply of available rental units.
  8. Improve the grievance hearing process by training non-staff members such as students from the University of Montana to serve as hearing officers or provide assistance to residents appearing at hearings.
    - Trained practicum students as ombudsmen and to serve as hearing officers for both PH and Section 8 programs.
  9. Establish a preventive maintenance program to improve unit competitiveness and decrease the time between vacancy and re-renting units.
    - Contracted for Physical Needs Assessment to assist in development of program.
  10. Establish a protocol to ensure that MHA stays current with program changes and takes advantage of regulatory waivers and other opportunities.
  11. Work towards obtaining Moving to Work designation or receiving similar waivers that provide for flexible operations.

**A. Implement development -specific strategies that coordinate physical improvements and redesign, market niche, level of affordability, form of ownership and means required to obtain resources to execute strategy.**

1. Develop in-house capacity to create redevelopment program that combine multiple sources of funding, especially program that do not rely on Sale and Replacement funds as a major source of funding.
  - Providing training to staff in August to complete this task.
2. Provide ongoing technical assistance to the leadership of the Resident Advisory Board (RAB) for a better understanding of management and mixed finance technical issues.
  - Retained services of consultant in April who evaluated our clients services and made recommendations for improvements.
  - Holding a further meeting with consultant in July to restructure positions in MHA to provide better support for the RAB.
3. Conduct a portfolio-wide capital needs assessment of MHA's properties to determine the extent of investment necessary to retain those properties and develop an on-going preventive maintenance and capital replacement schedule.
  - Contracted for Physical Needs Assessment.

4. Implement the recommendations of the recently completed accessibility and adaptability study through the renovation of housing units and improvements to sites.
  - Work completed at one site and in process at another Summer 2003
  - Other work being coordinated through Capital Fund planning process.
5. Complete a portfolio -wide master plan of MHA's units in conjunction with a review of affordable housing needs in MHA's jurisdiction. If possible, coordinate that master plan with City, County, HRC, and University efforts and programs, including modifying the scope of services to address their concerns, and seek financial participation from them.
  - In cooperation with City, County, HRC, and University, contracting with Abt Associates for Master Plan.
6. Partner with the City, County, State and other entities to improve MHA developments and the surrounding neighborhoods.
  - Partnered with North Missoula Community Development Corporation (NMCDC) to provide funding for a revolving loan fund.
  - Partnered with NMCDC to offer to purchase property on Kennett Street.
  - Partnered with NMCDC to offer to purchase 10 blocks of neglected riverfront property for neighborhood revitalization.
  - Opened discussions with YWCA and neighboring property owners to improve property at Toole Avenue.
  - Purchased the Joseph Residence and continue working with the Poverello to build new transitional housing units.
7. Pursue partnerships with local supportive service providers to acquire land, purchase existing housing, rehabilitate buildings, demolish structures as needed, and construct new dwelling units.
  - Partnered with the Poverello Center to purchase and maintain the Joseph Residence.
  - Working with YWCA, Missoula Aging Services, Mountain Home and others to provide funding to expand their programs.
  - Working with Missoula Aging Services and Missoula Housing Corporation to submit grant for elderly housing.
8. Acquire land, purchase existing housing, rehabilitate buildings, demolish structures as needed, and construct new dwelling units to build replacement public housing and mixed-use, mixed-financed, and/or mixed-income developments of a size and scale that is in keeping with the neighborhood and of the highest architectural design.
  - Purchased Uptown Motel to renovate into 14 unit SRO for homeless individuals.
  - Conducting feasibility analyses on a number of properties as they come available – whether vacant land, quality existing structures, or units that must be demolished.
9. Further develop plan for affordable housing to be built on Orchard Promenade site.
  - Selected architect to go forward with 16 units and a community center on this site.
10. Further develop plan for affordable housing to be built on Franklin Street site.
  - Selected architect to go forward with 6 to 8 (duplex) units on this site.

11. Complete plans for the substantial modernization of the exterior of the Toole Street project.
  - Currently working with the City and an architect to remove the warehouse and parking, and replace it with landscaped area.
  - Meeting with a butting property owner to initiate a program to improve the neighborhood.
  - Attempted to purchase the corner motel in order to redevelop the property.
12. Complete the renovations and construction of additional units on the Vantage Villa site.
  - New fences surrounding Vantage Villa to be installed Summer 2003.
  - Replacement applications submitted to HUD; awaiting approval to begin bidding process.
  - Completed design work.
13. Develop a plan for a higher and better use of the Speedway Avenue properties.
14. Seek additional sources of funds from local, State, Federal entities as well as major institutions and foundations in order to add improvements to MHA developments.
  - Received \$500,000 HOME grant for Uptown SRO.
  - Received \$577,800 Continuum of Care grant for Uptown SRO
  - Applied for \$105,000 from the Affordable Home Program from the Federal Reserve Bank of Seattle.
  - Applied for \$568,000 in tax credits for new development off Reserve Street.
  - Received FSS Renewal Grant of \$70,718 for two coordinators.
  - Applied for FSS renewal funding for three coordinators (to add homeownership coordinator.)
15. Work with business and for-profit corporations to provide subsidized housing through such mechanisms as tax credits or special governmental and non-governmental sources.
  - Partnered with KOA Development to submit 2003 Tax Credit Application for Great Northern Way.
  - In discussion w/property owner in East Missoula for 2004 Tax Credit application.
16. Partner with existing providers of subsidized housing to improve the availability of housing units, maintain high quality management and maintenance, and financial solvency.
17. Create alliances with Missoula's neighborhood councils and foster joint planning and better community relationships.
  - Attending neighborhood council meetings in neighborhoods where we are purchasing property or planning development activities.
  - Working with neighborhood on design items.
  - Actively participating in At-Risk Housing Coalition meetings.
18. Pursue bond funding to make progress on capital improvement plans for portfolio engineering.
19. Shift MHA-owned property towards multi-family configuration.
  - Contracted for Physical Needs Assessment to evaluate status of presently owned single family homes

20. Work with the City of Missoula to locate public facilities on or near public housing sites so that Supportive and Community Service agencies can be close to public housing residents.
21. Partner with local CDC's and others to acquire, renovate, and hold property to enable the use of those properties for affordable homeownership opportunities.
  - Working with the North Missoula Community Development Corporation to analyze property located on Cedar St., between West Broadway and the Clark Fork River, and determine if purchase is feasible.
  - Currently working with local architect to conduct feasibility analysis of property located in River Road neighborhood.
  - Worked with member of Franklinton Fort leadership team to choose architecture firm for 9<sup>th</sup> Street property .
22. Explore constructing or purchasing of homes to sell to Section 8 Homeownership voucher holders.
23. Provide for sufficient training to enable MHA to become Missoula's tax credit property management specialist for its and other tax credit properties.
  - Provided tax credit compliance training to staff in May.
  - 4 staff members are C3P certified.
  - Planning for continuing education for LIHTC continued certification.
24. Negotiate with the City of Missoula and others to obtain tax foreclosed or other publicly held properties that can be rehabilitated to add affordable housing in the community.
25. Establish policies and procedures for a Project -based Section 8 Program to judiciously allot project -based section 8 vouchers to support development and rehabilitation of neighborhoods, promote homeownership, and rehabilitate and build additional affordable housing.
  - Consultant has provided sample application, RFP, and contract documents.
  - Development staff currently being trained on program.
  - Outreach and education of the public and landlords on the need and benefit of Section 8 housing.
26. Establish loan pools for use by non -profits or to be loaned directly to clients for acquisition and rehabilitation of property, and to fund necessary predevelopment work.
  - Established \$300,000 loan pool for use by NM CDC to purchase and rehabilitate property on the north and west sides to maintain homeownership.
  - CDBG Essential Access grant money (revolving loan fund) being recycled into new loans for security/utility deposits as original loans are repaid by clients .
27. Restructure MHA's headquarters building to provide additional office space and a more readily accessible space.
  - Sound panels being installed to reduce noise and increase privacy.
  - On-going redesign of various offices for optimal usage.
28. Explore a new location for MHA's offices that will permit additional expansion space and that will locate the facility close to other governmental entities and supportive services including the use of some of the premises for market rate office space to help defer the cost of construction and operation.

29. Continue to assess MHA's scattered site properties to ensure they are meeting the demands for housing and match with our waiting list.
  - Assessment being conducted through Master Planning process.
30. Dispose of those MHA properties that no longer support MHA's mission or that, through their disposal, offer expanded opportunities for affordable housing or reinforce MHA's mission, and reuse MHA property that meet the same goal.
  - Assessment being conducted through Master Planning process.
31. Locate a new warehouse that will replace the facility located currently at the Toole site and the rental property on Schilling.
  - RFP in progress for new warehouse to be constructed on MHA - owned (non -public housing) property so that warehouse on Toole site can be removed for site improvements and rented space on Schilling can be released.
32. Supplement staff capacity through the use of consultants, architects and engineers, and fee accountants and other professionals to reduce staff expenses while obtaining the information necessary to make decisions regarding the management and operations of MHA.

**A. Develop Client Service Center to assist PHA and Section 8 applicants and program participants with MHA administrative requirements and processing. The Service Center will also serve as ombudsmen for program participants having bureaucratic difficulties and as liaisons to resident organizations.**

- This has been achieved to the degree recommended by consultant Andrew Daniels. PHA and Section 8 remain as separate departments, though meet weekly at a clients services meeting. Recertifications are being done with greater uniformity between the two departments. We have achieved greater cohesion between the two programs and FSS.
1. Implement applicant and new resident orientation and training program that are supported by the MHA lease or condition of lease approval.
    - Updated application form.
    - Added additional time for orientation.
    - Made orientation mandatory.
    - Plans to improve and revise the content of orientation are underway.
    - Involving Resident Advisory Board in updating orientation.
  2. Create customer service procedures for tracking contact to identify areas for operational improvement.
  3. Complete transition to Central File System within Service Center that will contain all applicant and program participant files and information.
    - Central files system completed.
  4. Implement the use of technology such as scannable forms and electronic records to reduce data inputting needs and paper files.
    - Developing and implementing scanning system to electronically index and archive all closed files.
    - Working with WEX Program (Job Service work experience program), who will be providing volunteer labor to complete "paperless" archives.
  5. Create and improve MHA website to provide information about MHA programs and the ability to contact MHA staff or submit requests for pre -application through the Internet.





2. Continue the development of rapid intervention tools for problem households including non -trespass orders, mandatory training programs for house cleaning, and court -stipulated agreements.
3. Expand relationships with federal and local inter -agency task forces to directly address locations of drug activities including use of undercover operations.
4. Strengthen lease enforcement for drug related and other criminal activity.
  - Drug activity in PH unit has been eliminated or driven underground.
  - Recommend to Board of Commissioners budget item to include family counseling services for our tenants like those provided by Employee Assistance Program APS.
5. Continue to support and expand the current Community Police program.
  - MHA Board approved use of non -HUD funds to retain the police services of Officer Rod Swanson for one more year.
6. Explore the renting of Public Housing units to police, fire, or other public safety or support service governmental personnel who will help to stabilize sites and neighborhoods.
  - Informed police department of possibility of officers occupying public housing units. Two officers have expressed interest.

**A. Develop MHA affiliated non -profit organizations, including a Community Housing Development Organization (CHDO), to assist Authority with redevelopment activities.**

1. Incorporate or assume the administration of such non -profit organizations as may advance MHA's mission.
  - Garden City Neighbors
  - Garden City CHDO
2. Establish a "Blue Ribbon" Board of Directors for the CHDO that combines low income individuals, MHA and City representatives with outside Director that brings skill sets and networks that can support the major level of redevelopment of MHA's portfolio that must occur over the next decade.
3. Using MHA's Master Plan determine how the CHDO could assist MHA with implementation of neighborhood housing strategies arising out of site -specific public housing redevelopment actions.
4. Consider development of CHDO resource base by transfer of selected assets such as scattered site developments.

**A. Design and implement home ownership programs using Section 8 subsidies to support mortgage payments as well as the conversion of acquired and new construction scattered sites to home ownership opportunities.**

1. Consult with City of Missoula and local real estate developer to develop a program using the new statutory ability to use Section 8 to support mortgages. A key issue will be identification of sites and existing residential structures (perhaps tax lien properties) that can provide the "product" for the program. Determine if MHA -owned scattered site developments may be an appropriate starting place.
  - Section 8 Home Ownership Program implemented.
  - In cooperation with Missoula Housing Corporation, received Neighborhood Housing Services 3 -year grant to provide second mortgage assistance to Section 8 home ownership voucher holders.

2. Develop a Memorandum of Agreement with the CHDO to take the lead on construction or rehabilitation of home ownership product for use in a MHA Section 8 Home ownership Program.
3. Identify a local entity with the ability to provide home ownership counseling and post-purchase support and contract for these services on a household by-household basis.
  - Partnered with the Missoula Housing Corporation, Family Basics and homeWord to provide counseling and foreclosure support for homeowners.
4. Meet with local banks and lenders to explain the new abilities of the Section 8 Program. Determine the feasibility of a loan pool supported by a consortium of banks to share risk and Community Reinvestment Act (CRA) credit.
  - Held two meetings with bankers/lenders.

## **II. IMPROVEMENT SYSTEMS**

### **A. Complete transition to new integrated management information system**

1. Continue integration of a new computer system into MHA operations, including refinement of comprehensive reporting on program utilization, performance indicators, income and expense information, program demographics, and a variety of operational activities such as rent collection, eviction process, work orders, etc.
  - Integration complete; creation and implementation of reports in progress.
  - Fully utilizing capacity of work order program to monitor maintenance time and materials, document type of work with work codes.
2. Refine and expand Intranet system to facilitate internal communication and access to approved policies, procedures, forms and other management tools.
  - Inter-office scheduling and email fully operational.
  - Suggestion box files created for inter-office sharing of policies, procedures, meeting agendas, etc.
3. Complete upgrade to new Windows version of Tenmast Software when available and provide training to staff.
  - Completed conversion to Windows-based software for all modules.
  - Brought Tenmast trainer on site for two-day training with staff.

### **B. Implement and sustain employee evaluation procedure to provide fair and accurate assessments of staff based upon utilization of skills, quality of work, job knowledge, supervisory initiative and aptitude, efficiency of execution, and ability to perform in a manner that supports agency goals and objectives.**

1. Refine and expand policies and procedures for annual and interim employee evaluations.
2. Revise MHA's personnel policies to reflect current practices in the industry and to meet local customs and practices.
  - Personnel policy manual currently being revised, with input from attorney, Board of Commissioners and staff; implementation projected for August 2003.
3. Develop appropriate evaluation criteria for each type of position on an "include but not limited to" basis.

4. Determine the feasibility of a performance based bonus system tied to meeting department goals and objectives and implement such a program if feasible. This system would have to avoid FLSA pay rate complications regarding "quid pro quo" bonus arrangements and also be limited in fiscal years during which the financial position of the Authority makes such payments not prudent.
5. Train supervisors and employees on evaluation system and its objectives.
6. Enroll and offer courses through Nan McKay and similar vendors to provide updated training opportunities through either on -line or on -site venues.
7. Investigate and partner with similar agencies to contract for human resource management services.

**C. Increase financial accountability of MHA operations and increase reserves.**

1. Refine Departmental Budget and reporting to better define and clarify MHA overhead factors.
2. Develop Service Contract cycles and bidding systems.
  - Issued RFPs, followed by contracts for provision of labor and materials for carpet and vinyl replacement through Dec. 2004.
  - Entered into contract for security services at Vantage Villa.
3. Develop system to monitor in -house and contract vacancy turnover programs on both cost and quality.
  - Maintenance supervisor directly responsible for inspection of turnover units prior to lease -up to ensure all necessary and requested work has been done in a timely, efficient, and cost -effective manner.
  - Modernized warehouse and inventory control to account for decentralized staff materials needs.
  - Implemented a Fixed Asset Tagging System
4. Modernize warehouse and inventory control to account for decentralized staff materials needs.
5. Maintain reserves to meet industry standards.
  - Reserves meet industry standards for Public Housing & Section 8.

**D. Establish Internal Audit Function**

1. Have Deputy Director develop monthly reports to cover PHAS and SEMAP items and provide a snapshot of agency status.
  - In progress.
2. Formalize an agency performance reporting system that would compile operational and financial information into a series of monthly, quarterly and semi-annual reports that can support analysis of budgets and internal planning activities.
  - In progress.
3. Develop file protocols for each department and program that define the data elements to be retained as part of the agency's official files. This would include whether these data elements are paper or electronic, who has right of access or ability to modify this information (which therefore include MIS security), and a procedural system for file purging and long term retention of records. This initiative needs to be coordinated with the implementation of a central file system for the Service Center.

4. Develop capacity for random audit of program files for both Section 8 and Public Housing Programs. This refers to file pull store review regulatory and procedural compliance of 5% to 10% of a program on an annual basis.
  - Hire part-time temporary HQS inspector to provide 5% quality control inspections for Section 8 units.
  - Assign file reviews for Section 8 to Assisted Housing Manager.
  - Assign file reviews for Public Housing to Property Manager.

**E. Maximize MHA income streams to support core mission to the maximum extent feasible.**

1. Continue work on energy performance contracting program to maximize cost savings under PFS incentive program. Use creative financing mechanisms such as performance contracting to finance improvements "off-budget".
  - Contracted with consultant to perform preliminary energy audit.
  - Providing training for staff in August on energy performance contracting.
2. Explore and implement a tax-credit property management effort to attract contracts from other owners of tax-credit properties.
  - 4 staff members are C3P certified.
  - Planning for continuing education for LIHTC continued certification.
3. Create system to assess, promote and monitor residents in transition from welfare-to-work or from marginal employment to living wage.
4. Continue expanding and refining risk management programs and staff safety training in order to mitigate and lessen insurance claims therefore leading to a reduction of insurance premiums.
  - Researching preventive and corrective maintenance procedures for dealing with mold problems, with goal to implement policies and procedures to reduce liability.
5. Explore adjusting the Fair Market Rents in Missoula as set by HUD and other budget and payment standards to more correctly reflect the low supply, high demand, and rapidly increasing prices.
6. Identify and develop new revenue producing businesses for the Housing Authority such as bond placement or third party property management contracts.
7. Seek public/private partnerships with community businesses and existing social service providers, to leverage MHA resources as well as increase the scope of grantsmanship.
  - HUD Section 202 Grant for the elderly submitted with Missoula Aging Services and Missoula Housing Corporation on Development Team.
8. Seek corporations or community groups who are interested in "adopting" a MHA development. This to provide stronger relationships between MHA residents and the Missoula community and would include recreational activities, special projects, mentoring and other programs that develop leadership skills and provide role models to MHA program participants.
9. Implement direct deposit payments of HAP to landlords.

**III. BUILD COMMUNITY AND SELF-SUFFICIENCY THROUGH MHA PROGRAMS**

**A. Improve self-sufficiency effort to help people in public housing move towards employment and homeownership, through coordination with outside agencies, which provides services.**

1. Complete initial needs assessment \ perceptions survey.
  - The initial FSS intake form was redesigned to include 3 distinct sections and be more client friendly.
2. Develop and implement system to track household job readiness and impediments to employment from unit or subsidy offer throughout of the residents' participation in MHA programs.
  - After a demographic study, develop a survey that includes input from households, community employment case managers and Vocational Rehabilitation.
3. Develop support systems for the transition from welfare to work or from marginal employment to livable wage.
  - Created partnerships with collaborative agencies such as Community Management Team (employment -related), Missoula Area Coordinated Employment Network (disability -related), Round Table (basic education and life skills -related) and The Resource Network (family and social service -related)
  - Presenting to Board and RAB proposal to contract for counseling services, including family or individual counseling, financial counseling, simple legal advice for public housing residents, free of charge, in the same format as an Employee Assistance Plan.
4. Design and implement Individual Savings Accounts (ISA) accounts to assist resident in saving monies that would have otherwise gone to pay rent but are exempted under HUD and MHA policies.
5. Continue to develop the Family Self-Sufficiency Program. Seek to be fully enrolled at 100 Section 8 participants and 15 Public Housing participants by fiscal year end.
  - As of June 2003, 66 Section 8 participants and 11 Public Housing participants.
6. Develop Memoranda of Agreement with supportive service providers to formalize their assistance to our residents and to provide a mechanism that would enable the development of supportive housing.

**B. Utilize non-profit subsidiary to design, implement and administer all MHA social service programs. These programs are to be supportive in nature and rely on established third party entities to provide direct services.**

1. Non-profit subsidiary will seek funds on MHA's behalf through grantsmanship and partnering.
2. MHA shall coordinate and facilitate delivery of community-based supportive services to its tenants with emphasis on basic life skills;
3. Non-profit subsidiary will coordinate all social service entities seeking access to MHA's developments including requests for programming space and access to residents.
4. MHA supportive service programs shall distinguish between those who can attain independence from public assistance and those are likely to require more permanent housing and design and deliver services accordingly;

**C. Strengthen Section 3 efforts**

1. Initiate a public information program on Section 3 and its new importance for organizations that want to do business with the Authority. This public information program should be included in a larger initiative to encourage local businesses to respond to MHA procurements.
  - Initiated discussions with the local Carpenter's Union to develop resident apprentice program, using Section 3 preference to encourage participation of local builders.
2. Determine the feasibility of creating a resident -controlled property management entity. This could be implemented as some form of Resident Management Corporation (RMC) or as an actual business that draws on resident participation across developments or programs.
3. Develop program to provide technical assistance to Section 3 businesses.

**D. Improve lease enforcement to build communities.**

1. Develop ongoing education programs for residents, law enforcement personnel, and judicial system on MHA lease requirements, federal regulations and the operational issues that MHA must confront to assure its residents the right to quiet and peaceful enjoyment of their housing.
2. Strictly enforce lease evictions that involve criminal activity that include, drugs, guns and violence.
3. Enhance and expand community watch initiatives (Neighborhood Watch, etc.).

**E. Improve MHA's ability to intervene with at-risk families**

1. Formalize referral process of families falling behind in rent to appropriate resource to assist them in budgeting and other matters.
2. Increase staff capacity to recognize when social service referrals are necessary.
  - Encourage and support relationship between property management and the social service coordinator to deal with troubled PH tenants.
  - Working with consultant to improve provision of client services.
3. Work to strengthen tenant organizations and communications so that tenants can begin to provide support to each other.
  - Researching, at request of Section 8 participants, allowing program participants to voluntarily donate to loan pool for security/utility deposits.
  - RAB producing a newsletter that will be distributed to all MHA clients.

**VI. STRENGTHEN MHA'S PRESENCE IN THE MISSOULA COMMUNITY AS A LEADER ON AFFORDABLE HOUSING ISSUES**

1. Develop a public relations program that provides periodic press releases and arranges for other forms of access to members of the press to make certain that MHA's turn -around activities are publicly understood.
  - Contracted with local public relations firm to provide services.
  - Acknowledging staff who have been promoted internally through the Missoulian's Getting Ahead column in the Sunday edition
2. Increase Commissioners' role to include periodic attendance at public forums or press briefings at which topics pertinent to their committee are presented (e.g. a press conference concerning MHA's annual modernization program or Housing Agency Plans submission).

3. Develop an agenda of legislative changes at the federal and state level that would support MHA's redevelopment.
  - ❑ Proposed legislation to create a Blue Ribbon Committee on Affordable Housing, which passed several legislative committees but was later tabled.
4. Advocate for a state -level equivalent to the Low Income Housing Tax Credit. This type of initiative has already been implemented or has pending legislation in several states.
  - ❑ Proposed program during 2003 Legislative session. Will reintroduce at next legislative session.
5. Coordinate with the City and County of Missoula toward a unified and consistent public housing policy.
6. Champion provision of equitable housing opportunity and development of affordable housing on behalf of those least able to advocate for themselves by actively marketing its programs to the community and advocating the housing needs of low -income persons in matters of community housing policy and land use regulation.
7. Become the local expert on housing policy and affordable housing development by providing the community with quality data on housing and housing needs, educating the community about housing issues and policy, and developing a public relations and media plan focusing on those served and in need rather than on the agency.
  - ❑ Working with Abt Associates to create Portfolio Master Plan
8. Work with the Missoula Housing Corporation, Missoula Aging Service, the District XI Human Resource Council, Neighborhood Housing Services and others to explore redevelopment, joint funding, homeownership, staff sharing, and cooperative arrangements with consultants.
9. Maintain and expand participation with the At -Risk Housing Coalition to find cooperative solutions to long -term homelessness and temporary housing needs.
10. Join and become active in local organizations that promote affordable housing in Missoula and Montana such as the Chamber of Commerce and Home Builders Association.
  - ❑ Joined Chamber of Commerce and Home Builders Association.
11. Become involved at the local and state levels with housing advocates to share information, training, and policies.
  - ❑ Bi-weekly meetings with group of Missoula non -profit affordable housing developers.
  - ❑ Members of State and Regional INAHRO.



**AnnualMHAPlan  
MHAFiscalYear2004  
[24CFRPart903.7]**

**i. AnnualPlanType:**

**TheMissoulaHousingAuthorityissubmittingaStreamlined  
Planasa HighPerformer.**

**ii. ExecutiveSummaryoftheAnnualPHAPlan**

[24CFRPart 903.79(r)]

**NolongerrequiredperHUD**

# Annual Plan Table of Contents

[24CFR Part 903.79(r)]

## Table of Contents

	<u>Page#</u>
<b>Annual Plan</b>	
i. Executive Summary.....	1
ii. Table of Contents.....	2
1. Housing Needs.....	6
2. Financial Resources.....	14
3. Policies on Eligibility, Selection and Admissions.....	15
4. Rent Determination Policies.....	25
5. Operations and Management Policies.....	30
6. Grievance Procedures.....	31
7. Capital Improvement Needs.....	32
8. Demolition and Disposition.....	34
9. Designation of Housing.....	35
10. Conversions of Public Housing.....	36
11. Homeownership.....	38
12. Community Service Programs.....	40
13. Crime and Safety.....	43
14. Pets (Inactive for January 1 PHAs).....	45
15. Civil Rights Certifications (included with PHA Plan Certifications).....	53
16. Audit.....	54
17. Asset Management.....	55
18. Other Information.....	56

## Attachments

### Required Attachments:

- Admissions Policy for Deconcentration
- FY2004 Capital Fund Program Annual Statement (Attachment A)**
- Most recent board -approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

### Optional Attachments:

- PHA Management Organizational Chart**
- FY2004 Capital Fund Program 5 Year Action Plan (Attachment A)**
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- Other (List below, providing each attachment name)**
  - Performance & Evaluation Reports **(Attachment B)**
  - Statement on RASS Neighborhood Appearance **(Attachment C)**
  - Statement of Accomplishments for FYE 2003 **(Attachment D)**
  - Statement on Project -Based Vouchers **(Attachment E)**

**Supporting Documents Available for Review**

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
<b>X</b>	PHA Plan Certification of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
<b>X</b>	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
<b>X</b>	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	5 Year and Annual Plans
<b>X</b>	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
<b>X</b>	Most recent board -approved operating budget for the public housing program	Annual Plan: Financial Resources;
<b>X</b>	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
<b>X</b>	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
<b>X</b>	Public Housing Deconcentration and Income Mixing Documentation: <ol style="list-style-type: none"> <li>MHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance</i>; Notice and any further HUD guidance) and</li> <li>Documentation of the required deconcentration and income mixing analysis</li> </ol>	Annual Plan: Eligibility, Selection, and Admissions Policies

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
<b>X</b>	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A&O Policy	Annual Plan: Rent Determination
<b>X</b>	Schedule of flat rents offered each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A&O Policy	Annual Plan: Rent Determination
<b>X</b>	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
<b>X</b>	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
<b>X</b>	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A&O Policy	Annual Plan: Grievance Procedures
<b>X</b>	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
<b>X</b>	The HUD -approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
<b>X</b>	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
<b>X</b>	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
<b>N/A</b>	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
<b>N/A</b>	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
<b>N/A</b>	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
<b>N/A</b>	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
<b>N/A</b>	Approved or submitted public housing home ownership programs/plans	Annual Plan: Homeownership
<b>X</b>	Policies governing any Section 8 Homeownership program <input checked="" type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
<b>X</b>	Any cooperative agreement between the PHA and the TANF Agency	Annual Plan: Community Service & Self-Sufficiency
<b>X</b>	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
<b>N/A</b>	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
<b>X</b>	The most recent Public Housing Drug Elimination Program (PHDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
<b>X</b>	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
<b>N/A</b>	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
<b>N/A</b>	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

# 1. Statement of Housing Needs

[24CFR Part 903.79(a)]

## A. Housing Needs of Families in the Jurisdiction/s Served by the PHA

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford- ability	Supply	Quality	Access - ibility	Size	Loca- tion
Income <= 30% of AMI	5,830	5	5	2	2	NA	NA
Income > 30% but <= 50% of AMI	4,353	5	5	2	2	NA	NA
Income > 50% but < 80% of AMI	4,837	4	4	2	2	NA	NA
Elderly	5,980	5	5	3	4	NA	NA
Families with Disabilities	8,841	4	4	2	4	NA	NA
Race/Ethnicity	NA	NA	NA	NA	NA	NA	NA
Race/Ethnicity	NA	NA	NA	NA	NA	NA	NA
Race/Ethnicity	NA	NA	NA	NA	NA	NA	NA
Race/Ethnicity	NA	NA	NA	NA	NA	NA	NA

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction/s  
Indicate year: 1999
- U.S. Census data: the Comprehensive Housing Affordability Strategy  
("CHAS") dataset
- American Housing Survey data  
Indicate year:
- Other housing market study  
Indicate year:
- Other sources: (list and indicate year of information)

### 2000 Census Information

## B. Housing Needs of Families on the Public Housing and Section 8 Tenant -Based Assistance Waiting Lists

<b>Housing Needs of Families on the Waiting List (as of September 2002)</b>			
Waiting list type: (select one) <input type="checkbox"/> Section 8 tenant -based assistance <input checked="" type="checkbox"/> Public Housing <input type="checkbox"/> Combined Section 8 and Public Housing <input type="checkbox"/> Public Housing Site -Based or sub -jurisdictional waiting list (optional) If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
<b>Waiting list total</b>	<b>502</b>		<b>47</b>
<b>Extremely low income &lt;= 30% AMI</b>	<b>414</b>	<b>82%</b>	
<b>Very low income (&gt;30% but &lt;= 50% AMI)</b>	<b>64</b>	<b>13%</b>	
<b>Low income (&gt;50% but &lt; 80% AMI)</b>	<b>24</b>	<b>5%</b>	
<b>Families with children</b>	<b>276</b>	<b>55%</b>	
<b>Elderly families</b>	<b>146</b>	<b>29%</b>	
<b>Families with Disabilities</b>	<b>80</b>	<b>16%</b>	
<b>Race/ethnicity</b>			
<b>White</b>	<b>452</b>	<b>90%</b>	
<b>African-American</b>	<b>1</b>	<b>0%</b>	
<b>Am. Ind./Asian/Pacifics./Other</b>	<b>50</b>	<b>10%</b>	
<b>Hispanic</b>	<b>5</b>	<b>1%</b>	
<b>Characteristics by Bedroom Size (Public Housing Only)</b>			
<b>1BR</b>	<b>226</b>	<b>45%</b>	
<b>2BR</b>	<b>215</b>	<b>43%</b>	
<b>3BR</b>	<b>48</b>	<b>10%</b>	
<b>4BR</b>	<b>13</b>	<b>2%</b>	
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes: How long has it been closed (# of months)? Does the PHA expect to open the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes Does the PHA permit specific categories of families on to the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

**HousingNeedsofFamiliesontheWaitingList  
(asofSeptember2002)**

Waitinglisttype:(selectone)  
Section8HousingChoiceVoucherProgram  
PublicHousing  
CombinedSection8andPublicHousing  
PublicHousingSite -Basedorsub -jurisdictionalwaitinglist(optional)  
 Ifused,identifywhichdevelopment/subjuri sdiction:

	#offamilies	%oftotalfamilies	AnnualTurnover
<b>Waitinglisttotal</b>	<b>774</b>		<b>119</b>
<b>Extremelylow income&lt;=30%AMI</b>	<b>405</b>	<b>64%</b>	
<b>Verylowincome (&gt;30%but&lt;=50% AMI)</b>	<b>215</b>	<b>28%</b>	
<b>Lowincome (&gt;50%but&lt;80% AMI)</b>	<b>64</b>	<b>8%</b>	
<b>Familieswith children</b>	<b>440</b>	<b>57%</b>	
<b>Elderlyfamilies</b>	<b>148</b>	<b>19%</b>	
<b>Familieswith Disabilities</b>	<b>186</b>	<b>24%</b>	
<b>Race/ethnicity</b>			
<b>White</b>	<b>697</b>	<b>90%</b>	
<b>African -American</b>	<b>7</b>	<b>1%</b>	
<b>Am.Ind./Asian/ Pacificls./Other</b>	<b>70</b>	<b>9%</b>	
<b>Hispanic</b>	<b>18</b>	<b>4%</b>	
<b>Characteristicsby BedroomSize (PublicHousing Only)</b>			
<b>1BR</b>			
<b>2BR</b>			
<b>3BR</b>			
<b>4BR</b>			

Isthewaitinglistclosed(selectone)?XNo Yes  
 Ifyes:  
 Howlonghasitbeenclosed(#ofmonths)?  
 DoesthePHAexpecttoreopenhelistinthePHAPlanyear? No Yes  
 DoesthePHApermitspecificcategoriesoffamiliesontothewaitinglist,evenifgenerally closed? No Yes



<b>HousingNeedsofFamiliesontheWaitingList (asofSeptember2002)</b>			
Waitinglisttype:(selectone) <input checked="" type="checkbox"/> Shelter+CareProgram <input type="checkbox"/> PublicHousing <input type="checkbox"/> CombinedSection8andPublicHousing <input type="checkbox"/> PublicHousingSite -Basedorsub -jurisdictionalwaitinglist(optional) Ifused,identifywhichdevelopment/subjurisdiction:			
	<b>#offamilies</b>	<b>%oftotalfamilies</b>	<b>AnnualTurnover</b>
<b>Waitinglisttotal</b>	<b>31</b>		<b>18</b>
<b>Extremelylow income&lt;=30%AMI</b>	<b>30</b>	<b>97%</b>	
<b>Verylowincome (&gt;30%but&lt;=50% AMI)</b>	<b>1</b>	<b>3%</b>	
<b>Lowincome (&gt;50%but&lt;80% AMI)</b>	<b>0</b>	<b>0</b>	
<b>Familieswith children</b>	<b>4</b>	<b>13%</b>	
<b>Elderlyfamilies</b>	<b>0</b>		
<b>Familieswith Disabilities</b>	<b>31</b>	<b>100%</b>	
<b>Race/ethnicity</b>			
<b>White</b>	<b>31</b>	<b>100%</b>	
<b>African -American</b>			
<b>Am.Ind./Asian/ PacificIs./Other</b>	<b>0</b>	<b>0</b>	
<b>Hispanic</b>	<b>0</b>	<b>0</b>	
<b>Characteristicsby BedroomSize (PublicHousing Only)</b>			
<b>1BR</b>			
<b>2BR</b>			
<b>3BR</b>			
<b>4BR</b>			
Isthewaitinglistclosed(selectone)?XNo <input type="checkbox"/> Yes Ifyes: Howlonghasitbeenenclosed(#ofmonths)? DoesthePHAexpecttoreopenthelistinthePHAPlanyear? <input type="checkbox"/> No <input type="checkbox"/> Yes DoesthePHApermitspecificcategoriesoffamiliesontothewaitinglist,evenifgenerally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

<b>Housing Need of Families on the Waiting List (as of September 2002)</b>			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 Welfare -to-Work Program			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site -Based or sub -jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	<b># of families</b>	<b>% of total families</b>	<b>Annual Turnover</b>
<b>Waiting list total</b>	<b>55</b>		<b>4</b>
<b>Extremely low income &lt;=30% AMI</b>	<b>49</b>	<b>89%</b>	
<b>Very low income (&gt;30% but &lt;=50% AMI)</b>	<b>6</b>	<b>11%</b>	
<b>Low income (&gt;50% but &lt;80% AMI)</b>	<b>0</b>	<b>0</b>	
<b>Families with children</b>	<b>55</b>	<b>100%</b>	
<b>Elderly families</b>	<b>0</b>		
<b>Families with Disabilities</b>	<b>2</b>	<b>4%</b>	
<b>Race/ethnicity</b>	<b>0</b>		
<b>White</b>	<b>45</b>	<b>81%</b>	
<b>African -American</b>	<b>1</b>	<b>2%</b>	
<b>Am. Ind./Asian/ Pacific Is./Other</b>	<b>9</b>	<b>17%</b>	
<b>Hispanic</b>	<b>5</b>	<b>10%</b>	
<b>Characteristics by Bedroom Size (Public Housing Only)</b>			
<b>1BR</b>			
<b>2BR</b>			
<b>3BR</b>			
<b>4BR</b>			
Is the waiting list closed (select one)? X No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

## C.Strategyfor AddressingNeeds

### (1)Strategies

**Need:Shortageofaffordablehousingforalleligiblepopulations**

**Strategy1.MaximizethenumberofaffordableunitsavailabletothePHA withinitscurrentresourcesby:**

- Employeffectivemaintenanceandmanagementpoliciestominimize thenumberofpublichousingunitsoff -line
- Reduceturnovertimeforvacatedpublichousingunits
- Reducetimetorenovatepublichousingunits
- Seekreplacementof publichousingunitslosttotheinventory throughmixedfinancedevelopment**
- Seekreplacementofpublichousingunitslosttotheinventorythrough section8replacementhousingresources
- Maintainorincreasesection8lease -upratesbyestablishing paymentstandardsthatwillenablefamieliestorentthroughoutthe jurisdiction**
- Undertakemeasurestoensureaccesstoaffordablehousingamong familiesassistedbythePHA,regardlessofunitsizerequired
- Maintainorincreasesection8lease -upratesbymarketingthe programtoowners,particularlythoseoutsideofareasofminority andpovertyconcentration**
- Maintainorincreasesection8lease -upratesbyeffectively screeningSection8applicantstoincreaseowneracceptanceof program**
- ParticipateintheConsolidatedPlandevelopmentprocessto ensurecoordinationwithbroadercommunitystrategies**
- Other(listbelow)

**Strategy2:Incre asethenumberofaffordablehousingunitsby:**

- Applyforadditionalsection8unitsshouldtheybecomeavailable**
- Leverageaffordablehousingresourcesinthecommunitythrough thecreation ofmixed -financehousing**
- PursuehousingresourcesotherthanpublichousingorSection8 tenant basedassistance.**
- Other:(listbelow)**

***OperateSection8Homeownershipandcontinueimplementationof Project-BasedVoucherPrograms***

**Need: Specific Family Types: Families at or below 30% of median**

**Strategy 1: Target available assistance to families at or below 30% of AMI**

- Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing
- Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant-based section 8 assistance
- Employ admissions preferences aimed at families with economic hardships
- Adopt rent policies to support and encourage work**
- Other: (list below)

**Need: Specific Family Types: Families at or below 50% of median**

**Strategy 1: Target available assistance to families at or below 50% of AMI**

- Employ admissions preferences aimed at families who are working
- Adopt rent policies to support and encourage work**
- Other: (list below)

**Need: Specific Family Types: The Elderly**

**Strategy 1: Target available assistance to the elderly:**

- Seek designation of public housing for the elderly
- Apply for special -purpose voucher targeted to the elderly, should they become available**
- Other: (list below)

**Need: Specific Family Types: Families with Disabilities**

**Strategy 1: Target available assistance to Families with Disabilities:**

- Seek designation of public housing for families with disabilities
- Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing**
- Apply for special -purpose voucher targeted to families with disabilities, should they become available**
- Affirmatively market to local non-profit agencies that assist families with disabilities**
- Other: (list below)**

**Use set -aside of Section 8 for PBV that is specifically targeted to supportive service programs**

**Need: Specific Family Types: Races or ethnicities with disproportionate housing needs**

**Strategy 1: Increase awareness of PHA resources among families of races and ethnicities with disproportionate needs:**

- Affirmatively market to races/ethnicities shown to have disproportionate housing needs**
- Other: (list below)

**Strategy 2: Conduct activities to affirmatively further fair housing**

Select all that apply

- Counsel section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units**
- Market the section 8 program to owners outside of areas of poverty/minority concentrations**
- Other: (list below)

**Other Housing Needs & Strategies: (list needs and strategies below)**

**(2) Reasons for Selecting Strategies**

Of the factors listed below, select all that influenced the MHA's selection of the strategies it will pursue:

- Funding constraints**
- Staffing constraints**
- Limited availability of sites for assisted housing**
- Extent to which particular housing needs are met by other organizations in the community
- Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA**
- Influence of the housing market on PHA programs**
- Community priorities regarding housing assistance**
- Results of consultation with local or state government**
- Results of consultation with residents and the Resident Advisory Board**
- Results of consultation with advocacy groups**
- Other: (list below)

## **2. Statement of Financial Resources**

[24CFR Part 903.79(b)]

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2000 grants)</b>		
a) Public Housing Operating Fund	<b>\$274,104</b>	
b) Public Housing Capital Fund	<b>\$404,252</b>	
c) HOPEVI Revitalization		
d) HOPEVI Demolition		
e) Annual Contributions for Section 8 Tenant -Based Assistance	<b>\$3,990,435</b>	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self - Sufficiency Grants		
h) Community Development Block Grant	<b>\$68,000</b>	
<b>i) HOME</b>	<b>\$500,000</b>	
Other Federal Grants (list below)		
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
<b>Shelter + Care</b>	<b>\$331,148</b>	
<b>2002 CFP</b>	<b>\$290,000</b>	<b>Modernization</b>
<b>FSS Coordinator Grant 2002</b>	<b>\$70,718</b>	
<b>Continuum of Care SRO</b>	<b>\$577,800</b>	<b>10-year grant</b>
<b>3. Public Housing Dwelling Rental Income</b>	<b>\$ 363,924</b>	<b>Federal Operations</b>
<b>4. Other income (list below)</b>		
<b>4. Non -federal sources (list below)</b>		
<b>Total resources</b>	<b>\$6,870,381</b>	

**3.MHAPoliciesGoverningEligibility,Selection,and Admissions**

[24CFRPart903.79(c)]

*MissoulaHousingAuthorityisrevisingitsAdmissions&Continued OccupancyPolicy(ACOP).Thefollowingresponsesreflectthecurrent planandanticipatedchangestotheplan.*

**A.PublicHousing**

**(1)Eligibility**

a.WhendoesthePHAverifyeligibilityforadmissiontopublichousing?(select allthatapply) t

- Whenfamiliesarewithinacertainnumberofbeingofferedaunit: (statenumber)Ten(10)**
- Whenfamiliesarewithinacertaintimeofbeingofferedaunit: (statetime)Three(3)months**
- Other:(describe)

b.Whichnon-income(screening)factorsdoesthePHAusetoestablish eligibilityforadmissiontopublichousing(selectallthatapply)?

- CriminalorDrug-relatedactivity**
- Rentalhistory**
- Housekeeping**
- Other(describe)**

***Evidenceofrehabilitationandmitigatingcircumstances***

- c.  Yes  No:DoesthePHArequestcriminalrecordsfromlocallaw enforcementagenciesforscreeningpurposes?
- d.  Yes  No:DoesthePHArequestcriminalrecordsfromStatelaw enforcementagenciesforscreeningpurposes?

***PublicHousing&Section8Applicants***

- e.  Yes  No: DoesthePHAaccessFBIcriminalrecordsfromtheFBI forscreeningpurposes?(eitherdirectlyorthroughan NCIC-authorizedsource)

**(2)WaitingListOrganization**

a.WhichmethodsdoesthePHAplantousetoorganizeit'spublichousing waitinglist(selectallthatapply)

- Community-widelist**

- Sub-jurisdictional lists
- Site-based waiting lists
- Other (describe)

b. Where may interested persons apply for admission to public housing?

- MHA main administrative office**
- MHA development site management office
- Other (list below)

c. If the PHA plans to operate one or more site-based waiting lists in the coming year, answer each of the following questions; if not, skip to subsection **(3) Assignment**

1. How many site-based waiting lists will the PHA operate in the coming year?

2.  Yes  No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously HUD-approved site-based waiting list plan)? If yes, how many lists?

3.  Yes  No: May families be on more than one list simultaneously? If yes, how many lists?

4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?

- PHA main administrative office
- All PHA development management offices
- Management offices at developments with site-based waiting lists
- At the development to which they would like to apply
- Other (list below)

**(3) Assignment**

a. How many vacant unit choices are applicants ordinarily given before they fall to the bottom of or are removed from the waiting list? (select one)

- One**
- Two
- Three or More

***Maybe retained on waiting list if unit is refused for "good cause."***

b.  Yes  No: Is this policy consistent across all waiting list types?



c. If answer to b is no, list variations for any other than the primary public housing waiting list/s for the PHA:

**(4) Admissions Preferences**

a. Income targeting:

Yes  No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admission to public housing to families at or below 30% of median area income?

b. Transfer policies:

In what circumstances will transfer take precedence over new admissions? (list below)

- Emergencies**
- Overhoused**
- Underhoused**
- Medical justification**
- Administrative reasons determined by the MHA (e.g., to permit modernization work)**
- Resident choice: (state circumstances below)
- Other: (list below)

c. Preferences

1.  Yes  No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If "no" is selected, skip to subsection **(5) Occupancy**)

2. Which of the following admission preferences does the MHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences:

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)**
- Victims of domestic violence
- Substandard housing
- Homelessness
- High rent burden (rent is > 50 percent of income)

Other preferences: (select below)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs

- Householdsthatcontributetomeetingincomegoals(broadrangeof incomes)
- Householdsthatcontributetomeetingincomerequirements(targeting)
- Thosepreviouslyenrolledineducational,training,orupwardmobility programs
- Victimsofreprisalsorhatecrimes
- Otherpreference(s)(listbelow)**

***Preferenceforelderly,disabled,orfamiliesoversinglefamily memberhouseholds***

3.Ifthe PHAwillemployadmissionspreferences,pleaseprioritizebyplacing a“1”inthespacethatrepresentsyourfirstpriority,a“2”inthebox representingyoursecondpriority,andsoon.Ifyougiveequalweightto oneormoreofthesechoices(eitherthroughanabsolutehierarchyor throughapointsystem),placethesamenumbernexttoeach.Thatmeans youcanuse“1”morethanonce,“2”morethanonce,etc.

**1DateandTime**

FormerFederalpreferences:

- 1point InvoluntaryDisplacement(Disaster,GovernmentAction,Action ofHousing**  
 Owner,Inaccessibility,PropertyDisposition)  
 Victimsofdomesticviolence  
 Substandardhousing  
 Homelessness  
 Highrentburden

Otherpreferences(selectallthatapply)

- Workingfamiliesandthoseunabletoworkbecauseofageordisability
- Veteransandveterans’families
- Residentwholiveand/orworkinthejurisdiction
- Thoseenrolledcurrentlyineducational,training,orupwardmobility programs
- Householdsthatcontributetomeetingincomegoals(broadrangeof incomes)
- Householdsthatcontributetomeetingincomerequirements(targeting)
- Thosepreviouslyenrolledineducational,training,orupwardmobility programs
- Victimsofreprisalsorhatecrimes
- Otherpreference(s)(listbelow)

**1point Preferenceforelderly,disabled,orfamiliesoversingle familymemberhouseholds**

**1point Administrativetransfer**

4. Relationship of preferences to income targeting requirements:

- The PHA applies preferences within income tiers  
 **Not applicable: the pool of applicant families ensure that the PHA will meet income targeting requirements**

**(5) Occupancy**

a. What reference materials can applicants and residents use to obtain information about the rules of occupancy of public housing (select all that apply)

- The MHA -resident lease**  
 **The MHA's Admissions and (Continued) Occupancy policy**  
 **MHA briefing seminars or written materials**  
 **Other source (list)**

***MHA Tenant Handbook with information and detail on MHA facilities.***

b. How often must residents notify the PHA of changes in family composition? (select all that apply)

- At an annual reexamination and lease renewal**  
 **Anytime family composition changes**  
 **At family request for revision**  
 **Other (list)**

**(6) Deconcentration and Income Mixing**

a.  Yes  No: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?

b.  Yes  No: Did the PHA adopt any changes to its **admissions policies** based on the results of the required analysis of the need to promote deconcentration of poverty or to assure income mixing?

c. If the answer to b was yes, what changes were adopted? (select all that apply)

- Adoption of site -based waiting lists  
If selected, list targeted developments below:

- Employing waiting list “skipping” to achieve deconcentration of poverty or income mixing goals at targeted developments**  
If selected, list targeted developments below:

**100/920/102 Pullman**  
**712 Charlo**  
**1237/1320 Butte & 730 N. 6<sup>th</sup>**  
**805/811/936 Stoddard**  
**1609/1613 Phillips**  
**1201/1205/1209 Toole**  
**931/933 S. 4<sup>th</sup> West**  
**5-7/41-50 Russell Park**

- Employing new admission preferences at targeted developments  
If selected, list targeted developments below:
- Other (list policies and development targeted below)

- d.  Yes  No: Did the PHA adopt any changes to **other** policies based on the results of the required analysis of the need for deconcentration of poverty and income mixing?

e. If the answer to d was yes, how would you describe these changes? (select all that apply)

- Additional affirmative marketing
- Actions to improve the marketability of certain developments
- Adoption or adjustment of ceiling rents for certain developments
- Adoption of rent incentives to encourage deconcentration of poverty and income -mixing
- Other (list below)

f. Based on the results of the required analysis, in which developments will the PHA make special efforts to attract or retain higher -income families? (select all that apply)

- Not applicable: results of analysis did not indicate a need for such efforts
- List (any applicable) developments below:

g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower -income families? (select all that apply)

- Not applicable: results of analysis did not indicate a need for such efforts
- List (any applicable) developments below:

## B. Section 8

***The Missoula Housing Authority is currently revising its Section 8 Administrative Plan. The following responses reflect the current plan and anticipated changes to the plan.***

### **(1) Eligibility**

a. What is the extent of screening conducted by the PHA? (select all that apply)

- Criminal or drug -related activity only to the extent required by law or regulation -Section 8 Program only.**
- Criminal and drug -related activity, more extensively than required by law or regulation -Public Housing**
- More general screening than criminal and drug -related activity (list factors below)
- Other (list below)

b.  Yes  No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

c.  Yes  No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

d.  Yes  No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

e. Indicate what kinds of information you share with prospective landlords? (select all that apply)

- Criminal or drug -related activity
- Other (describe below)**

***Participant's landlord history under program. Release of criminal or drug related activity, if requested and if authorized by participant.***

### **(2) Waiting List Organization**

a. With which of the following program waiting lists is the section 8 tenant based assistance waiting list merged? (select all that apply)

- None**
- Federal public housing
- Federal moderate rehabilitation

- Federal project -based certificate program
- Other federal or local program (list below)

b. Where may interested persons apply for admission to section 8 tenant based assistance? (select all that apply)

- MH main administrative office**
- Other (list below)

**(3) Search Time**

a.  Yes  No: Does the PHA give extensions on standard 60 -day period to search for a unit?

If yes, state circumstances below:

1. ***Documented medical reasons or circumstances.***
2. ***Family qualifies for 4 -bedroom unit or larger.***
3. ***As a reasonable accommodation for a disability.***
4. ***If Request for Tenancy Approval is awaiting upgradetomeet HQS and Local Sanitary Code Standards. Participant search period is extended to find another unit, if unit ultimately fails.***

**(4) Admissions Preferences**

a. Income targeting

Yes  No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the section 8 program to families at or below 30% of median area income?

b. Preferences

1.  Yes  No: Has the PHA established preferences for admission to section 8 tenant based assistance? (other than date and time of application) (if no, skip to subcomponent **(5) Special purpose section 8 assistance programs**)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- Victims of domestic violence
- Substandard housing
- Homelessness

- Highrentburden(rentis>50percentofincome)

Otherpreferences(selectallthatapply)

- Workingfamiliesandthoseunabletoworkbecauseofageordisability
- Veteransandveterans'families
- Residentswholiveand/orworkinyourjurisdiction
- Thoseenrolledcurrentlyineducational,training,orupwardmobility programs
- Householdsthatcontributetomeetingincomegoals(broadrangeof incomes)
- Householdsthatcontributetomeetingincomerequirements(targeting)
- Thosepreviouslyenrolledineducational,training,orupwardmobility programs
- Victimsofprisalsorhatecrimes
- Otherpreference(s)(listbelow)**

***Preferencefor elderly,disabled,orfamiliesoversinglefamily memberhouseholds.***

3.IfthePHAwillemployadmissionspreferences,pleaseprioritizebyplacing a“1”inthespacethatrepresentsyourfirstpriority,a“2”inthebox representingyoursecondpriority,andsoon.Ifyougiveequalweightto oneormoreofthesechoices(eitherthroughanabsolutehierarchyor throughapointsystem),placethesamenumbernexttoeach.Thatmeans youcanuse“1”morethanonce,“2”morethanonce,etc.

## 1 DateandTime

FormerFederalpreferences

- 1point** **InvoluntaryDisplacement(Disaster,GovernmentAction, ActionofHousingOwner,Inaccessibility,Property Disposition)**  
Victimsofdomesticviolence  
Substandardhousing  
Homelessness  
Highrentburden

Otherpreferences(selectallthatapply)

- Workingfamiliesandthoseunabletoworkbecauseofageordisability
- Veteransandveterans'families
- Residentswholiveand/orworkinyourjurisdiction
- Thoseenrolledcurrentlyineducational,training,orupwardmobility programs
- Householdsthatcontributetomeetingincomegoals(broadrangeof incomes)
- Householdsthatcontributetomeetingincomerequirements(targeting)

- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)**

**1 point Preference for elderly, disabled, or families over single family member households**

**1 point Administrative transfer**

4. Among applicants on the waiting list with the equal preference status, how are applicants selected? (select one)

- Date and time of application**
- Drawing (lottery) or other random choice technique

5. If the PHA plans to employ preferences for "residents who live and/or work in the jurisdiction" (select one)

- This preference has previously been reviewed and approved by HUD
- The PHA requests approval for this preference through this PHA Plan

6. Relationship of preferences to income targeting requirements: (select one)

- The PHA applies preferences within income tiers
- Not applicable: the pool of applicant families ensure that the PHA will meet income targeting requirements**

### **(5) Special Purpose Section 8 Assistance Programs**

a. In which documents or other reference materials are the policies governing eligibility, selection, and admission to any special -purpose section 8 program administered by the PHA contained? (select all that apply)

- The Section 8 Administrative Plan**
- Briefing sessions and written materials**
- Other (list below)

b. How does the PHA announce the availability of any special -purpose section 8 programs to the public?

- Through published notices**
- Other (list below)**

***Throughout reach to specific non -profit groups that assist persons with disabilities, and agencies who assist families with self-sufficiency goals.***



## 4.PHARentDeterminationPolicies

[24CFRPart903.79(d)]

### **A.PublicHousing**

#### (1)IncomeBasedRentPolicies

a.Useofdiscretionarypolicies:(selectone)

- TheMHAwillnotemployanydiscretionaryrent-settingpoliciesfor incomebasedrentinpublichousing.Income-basedrentsaresetat thehigherof30%ofadjustedmonthlyincome,10%ofunadjusted monthlyincome,thewelfare rent,orminimumrent(lessHUD mandatorydeductionsandexclusions).(Ifselected,skiptosub component(2))

---or---

- TheMHAemploysdiscretionarypoliciesfordeterminingincome basedrent(Ifselected,continuetquestionb.)**

b.MinimumRent

1.WhatamountbestreflectsthePHA'sminimumrent?(selectone)

- \$0  
 \$1-\$25  
 \$26-\$50

2.  Yes  No:Has thePHAadoptedanydiscretionaryminimumrent hardshipexemptionpolicies?

3.If yestoquestion2,listthesepoliciesbelow :

c. Rentssetatlessthan30%thanadjustedincome

1.  Yes  No:DoesthePHAplantocharge rentsatafixedamountor percentagelessthan30%ofadjustedincome?

2.If yestoabove,listtheamountsorpercentageschargedandthe circumstancesunderwhichthesewillbeusedbelow:

d. Which of the discretionary (optional) deductions and/or exclusions policies does the PHA plan to employ (select all that apply)

- For the earned income of a previously unemployed household member
- For increases in earned income
- Fixed amount (other than general rent -setting policy)  
If yes, state amount/s and circumstances below:
- Fixed percentage (other than general rent -setting policy)  
If yes, state percentage/s and circumstances below:
- For household heads
- For other family members
- For transportation expenses
- For the non-reimbursed medical expenses of non-disabled or non-elderly families
- Other (describe below)

e. Ceiling rents

1. Do you have ceiling rents? (rents set at a level lower than 30% of adjusted income) (select one)

- Yes for all developments
- Yes but only for some developments
- No**

2. For which kinds of developments are ceiling rents in place? (select all that apply)

- For all developments
- For all general occupancy developments (not elderly or disabled or elderly only)
- For specified general occupancy developments
- For certain parts of developments; e.g., the high-rise portion
- For certain size units; e.g., larger bedroom sizes
- Other (list below)

3. Select the space or spaces that best describe how you arrive at ceiling rents (select all that apply)

- Market comparability study
- Fair market rents (FMR)
- 95<sup>th</sup> percentile rents
- 75 percent of operating costs
- 100 percent of operating costs for general occupancy (family) devs.
- Operating costs plus debt service
- The "rental value" of the unit
- Other (list below)

f. Rentre -determinations:

1. Between income reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply)

- Never
- At family option
- Anytime the family experiences an income increase
- Anytime a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold) \_\_\_\_\_
- Other (list below)

***2003 Annual Plan proposed change for families experiencing an income increase above a \$200 threshold has been removed from Board of Commissioners consideration after it was determined there would be no substantial timesavings.***

g.  Yes  No: Does the PHA plan to implement individual savings accounts for residents (ISAs) as an alternative to the required 12 month disallowance of earned income and phasing in of rent increases in the next year?

**(2) Flat Rents**

1. In setting the market -based flat rents, what sources of information did the PHA use to establish comparability? (select all that apply.)

- This section 8 rent reasonableness study of comparable housing**
- Survey of rents listed in local newspaper**
- Survey of similar unassisted units in the neighborhood
- Other (list/describe below)**

***Rent rate analysis performed by local property management firm under contract to MHA.***

## **B. Section 8 Tenant -Based Assistance**

### **(1) Payment Standards**

a. What is the MHA's payment standard? (select the category that best describes your standard)

- At or above 90% but below 100% of FMR
- 100% of FMR
- Above 100% but at or below 110% of FMR**
- Above 110% of FMR (if HUD approved; describe circumstances below)

***MHA continues to investigate the possibility of increasing payment standards up to 120% in certain census tracts during FY2004.***

b. If the payment standard is lower than FMR, why has the PHA selected this standard? (select all that apply)

- FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area
- The PHA has chosen to serve additional families by lowering the payment standard
- Reflects market or submarket
- Other (list below)

c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply)

- FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area**
- Reflects market or submarket**
- To increase housing options for families**
- Other (list below)**

***To assist lease-up under program, and provide wider housing choice.***

d. How often are payment standards reevaluated for adequacy? (select one)

- Annually
- Other (list below)

e. What factors will the PHA consider in its assessment of the adequacy of its payment standard? (select all that apply)

- Success rates of assisted families**
- Rent burdens of assisted families**
- Other (list below)

**(2)MinimumRent**

a. What amount best reflects the MHA's minimum rent? (select one)

- \$0
- \$1-\$25
- \$26-\$50**

b.  Yes  No: Has the PHA adopted any discretionary minimum rent hardship exemption policies? (if yes, list below)

**5. Operations and Management**

[24CFR Part 903.79(e)]

**MHA is a High Performer based on its most recent MASS score and is not required to complete this section.**

**A. PHA Management Structure**

- An organization chart showing the PHA's management structure and organization is attached.
- A brief description of the management structure and organization of the PHA follows:

**B. HUD Programs Under PHA Management**

<b>Program Name</b>	<b>Units or Families Served at Year Beginning</b>	<b>Expected Turnover</b>
Public Housing		
Section 8 Vouchers		
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers (list individually)		
Public Housing Drug Elimination Program (PHDEP)		
Other Federal Programs (list individually)		

**C. Management and Maintenance Policies**

or eradication of pest infestation (which includes cockroach infestation) and the policies governing Section 8 management.

- (1) Public Housing Maintenance and Management: (list below)
- (2) Section 8 Management: (list below)

**6. PHA Grievance Procedures**

[24CFR Part 903.79(f)]

**MHA is considered a High Performer based on its most recent MASS score and is not required to complete this section.**

**A. Public Housing**

- 1.  Yes  No: Has the MHA established any written grievance procedures in addition to federal requirements found at 24CFR Part 966, Subpart B, for residents of public housing?

If yes, list additions to federal requirements below:

- 2. Which MHA offices should residents or applicants to public housing contact to initiate the MHA grievance process? (select all that apply)

- MHA main administrative office
- PHA development management offices
- Other (list below)

**B. Section 8 Tenant -Based Assistance**

- 1.  Yes  No: Has the MHA established informal review procedures for applicants to the Section 8 tenant -based assistance program and informal hearing procedures for families assisted by the Section 8 tenant -based assistance program in addition to federal requirements found at 24 CFR 982?

If yes, list additions to federal requirements below:

- 2. Which MHA offices should applicants or assisted families contact to initiate the informal review and informal hearing processes? (select all that apply)

- MHA main administrative office
- Other (list below)

## **7. Capital Improvement Needs**

[24CFR Part 903.79(g)]

### **A. Capital Fund Activities.**

#### **(1) Capital Fund Program Annual Statement**

Select one:

**The Capital Fund Program Annual Statement for FY2003 is included with the 5 -Year Plan as Attachment A. Performance & Evaluation Reports for funding years 2000, 2001, and 2002 are provided as an attachment to the MHA Plan at Attachment B.**

-or-

The Capital Fund Program Annual Statement is provided below: (if selected, copy the CFP Annual Statement from the Table Library and insert there)

#### **(2) Optional 5 -Year Action Plan**

a.  Yes  No: **Is the MHA providing an optional 5 -Year Action Plan for the Capital Fund?** (if no, skip to sub -component 7B)

b. If yes to question a, select one:

**The Capital Fund Program 5 -Year Action Plan is provided as an attachment to the PHA Plan at Attachment A.**

-or-

The Capital Fund Program 5 -Year Action Plan is provided below: (if selected, copy the CFP optional 5 Year Action Plan from the Table Library and insert there)



**B.HOPEVlandPublicHousingDevelopmentand ReplacementActivities(Non -CapitalFund)**

- Yes  No:a) Has the PHA received a HOPEVI revitalization grant? (if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary)  
b) Status of HOPEVI revitalization grant (complete one set of questions for each grant)

1. Development name:

2. Development (project) number:

3. Status of grant: (select the statement that best describes the current status)

- Revitalization Plan under development
- Revitalization Plan submitted, pending approval
- Revitalization Plan approved
- Activities pursuant to an approved Revitalization Plan underway

- Yes  No:c) Does the PHA plan to apply for a HOPEVI Revitalization grant in the Plan year?  
If yes, list development name/s below:

- Yes  No:d) Will the PHA be engaging in any mixed -finance development activities for public housing in the Plan year?  
If yes, list developments or activities below:

- Yes  No:e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?  
If yes, list developments or activities below:

**Seven units of Public Housing remain available for replacement. Based on recommendations of Portfolio Master Plan, MHA may seek to replace these seven units.**

## 8. Demolition and Disposition

[24CFR Part 903.79(h)]

1.  Yes  No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 of the U.S. Housing Act of 1937 (42 U.S.C. 1437p)) in the plan Fiscal Year? (If "No", skip to component 9; if "yes", complete one activity description for each development.)

### 2. Activity Description

- Yes  No: Has the PHA provided the activities description information in the **optional** Public Housing Asset Management Table? (If "yes", skip to component 9. If "No", complete the Activity Description table below.)

<b>Demolition/Disposition Activity Description</b>
1a. Development name: 1b. Development (project) number:
2. Activity type: Demolition <input type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: (DD/MM/YY)
5. Number of units affected: 6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: b. Projected end date of activity:

**9. Designation of Public Housing for Occupancy by Elderly Families or Families with Disabilities or Elderly Families and Families with Disabilities**

[24CFR Part 903.79(i)]

1.  Yes  No: Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will apply for designation for occupancy by only elderly families or only families with disabilities, or by elderly families and families with disabilities as provided by section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year? (If "No", skip to component 10. If "yes", complete one activity description for each development, unless the PHA is eligible to complete a streamlined submission; PHA's completing streamlined submissions may skip to component 10.)

**2. Activity Description**

Yes  No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If "yes", skip to component 10. If "No", complete the Activity Description table below.

<b>Designation of Public Housing Activity Description</b>	
1a. Development name:	
1b. Development (project) number:	
2. Designation type:	
Occupancy by only the elderly	<input type="checkbox"/>
Occupancy by families with disabilities	<input type="checkbox"/>
Occupancy by only elderly families and families with disabilities	<input type="checkbox"/>
3. Application status (select one)	
Approved; included in the PHA's Designation Plan	<input type="checkbox"/>
Submitted, pending approval	<input type="checkbox"/>
Planned application	<input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: (DD/MM/YY)	
5. If approved, will this designation constitute a (select one)	
<input type="checkbox"/> New Designation Plan	
<input type="checkbox"/> Revision of a previously approved Designation Plan?	
6. Number of units affected:	
7. Coverage of action (select one)	
<input type="checkbox"/> Part of the development	
<input type="checkbox"/> Total development	

**10. Conversion of Public Housing to Tenant -Based Assistance**

[24CFR Part 903.79(j)]

**A. Assessments of Reasonable Revitalization Pursuant to section 202 of the HUD FY 1996 HUD Appropriations Act**

1.  Yes  No: Have any of the PHA's developments or portions of developments been identified by HUD or the PHA as covered under section 202 of the HUD FY 1996 HUD Appropriations Act? (If "No", skip to component 11; if "yes", complete one activity description for each identified development, unless eligible to complete a streamlined submission. PHAs completing streamlined submissions may skip to component 11.)

**2. Activity Description**

Yes  No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If "yes", skip to component 11. If "No", complete the Activity Description table below.

<b>Conversion of Public Housing Activity Description</b>	
1a. Development name:	
1b. Development (project) number:	
2. What is the status of the required assessment?	
<input type="checkbox"/> Assessment underway <input type="checkbox"/> Assessment results submitted to HUD <input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question) <input type="checkbox"/> Other (explain below)	
3. <input type="checkbox"/> Yes <input type="checkbox"/> No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to block 5.)	
4. Status of Conversion Plan (select the statement that best describes the current status)	
<input type="checkbox"/> Conversion Plan in development <input type="checkbox"/> Conversion Plan submitted to HUD on: (DD/MM/YYYY) <input type="checkbox"/> Conversion Plan approved by HUD on: (DD/MM/YYYY) <input type="checkbox"/> Activities pursuant to HUD - approved Conversion Plan underway	
5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one)	
<input type="checkbox"/> Units addressed in a pending or approved demolition application	

(date submitted or approved:

- Units addressed in a pending or approved HOPEVI demolition application (date submitted or approved: )
- Units addressed in a pending or approved HOPEVI Revitalization Plan (date submitted or approved: )
- Requirements no longer applicable: vacancy rates are less than 10 percent
- Requirements no longer applicable: site now has less than 300 units
- Other: (describe below)

**B. Reserved for Conversions pursuant to Section 22 of the U.S. Housing Act of 1937**

**C. Reserved for Conversions pursuant to Section 33 of the U.S. Housing Act of 1937**

# 11. Homeownership Programs Administered by the PHA

[24CFR Part 903.79(k)]

## A. Public Housing

1.  Yes  No: Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under section 5(h), the HOPE I program, or section 32 of the U.S. Housing Act of 1937 (42 U.S.C. 1437z -4). (If "No", skip to component 11B; if "yes", complete one activity description for each applicable program/plan, unless eligible to complete a streamlined submission due to **small PHA** or **high performing PHA** status. PHAs completing streamlined submissions may skip to component 11B.)

### 2. Activity Description

Yes  No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? (If "yes", skip to component 12. If "No", complete the Activity Description table below.)

<b>Public Housing Homeownership Activity Description (Complete one for each development affected)</b>
1a. Development name: 1b. Development (project) number:
2. Federal Program authority: <input type="checkbox"/> HOPE I <input type="checkbox"/> 5(h) <input type="checkbox"/> Turnkey III <input type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one) <input type="checkbox"/> Approved; included in the PHA's Homeownership Plan/Program <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: (DD/MM/YYYY)
5. Number of units affected: 6. Coverage of action: (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development

## B. Section 8 Tenant Based Assistance

1.  Yes  No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982? (If "No", skip to component 12; if "yes", describe each program using the table below (copy and complete questions for each program identified), unless the PHA is eligible to complete a streamlined submission due to high performer status. **High performing PHAs** may skip to component 12.)

2. Program Description:

***The MHA in cooperation with the Missoula Housing Corporation, Women's Opportunity & Resource Development, Inc. (WORD), District XI Human Resource Development Council, and Neighborhood Housing Services of Great Falls, continue to operate a Section 8 Homeownership Voucher Program. Eligible Section 8 participants are offered the opportunity to participate in a First Time Homeowners Program. Preference is given to participants who are under contract in the MHA's Family Self-Sufficiency Program.***

***WORD is a fully approved HUD Counseling Agency in good standing.***

a. Size of Program

- Yes  No: Will the PHA limit the number of families participating in the section 8 homeownership option?

If the answer to the question above was yes, which statement best describes the number of participants? (select one)

- 25 or fewer participants  
 **26 - 50 participants**  
 51 to 100 participants  
 more than 100 participants

b. MHA - established eligibility criteria

- Yes  No: Will the PHA's program have eligibility criteria for participation in its Section 8 Homeownership Option program in addition to HUD criteria?

If yes, list criteria below:

***Family must be a qualified existing program participant who has been receiving housing assistance from MHA for a minimum of one year, and who has successfully complied with all rental program and lease requirements during that time. No debt may be owing to MHA or any other housing authority.***

## **12. PHA Community Service and Self -sufficiency Programs**

[24CFR Part 903.79(l)]

**MHA is a High Performer based on its most recent MASS score and is not required to complete this section.**

### **A. PHA Coordination with the Welfare (TANF) Agency**

1. Cooperative agreements:

Yes  No: Has the PHA entered into a cooperative agreement with the TANF Agency, to share information and/or target supportive services (as contemplated by section 12(d)(7) of the Housing Act of 1937)?

If yes, what was the date that agreement was assigned?

DD/MM/YY

2. Other coordination efforts between the PHA and TANF Agency (select all that apply)

- Client referrals
- Information sharing regarding mutual clients (for rent determinations and otherwise)
- Coordinate the provision of specific social and self -sufficiency services and program to eligible families
- Jointly administer programs
- Partner to administer a HUD Welfare -to-Work voucher program
- Joint administration of other demonstration program
- Other (describe)

### **B. Services and programs offered to residents and participants**

#### **(1) General**

a. Self -Sufficiency Policies

Which, if any of the following discretionary policies will the PHA employ to enhance the economic and social self -sufficiency of assisted families in the following areas? (select all that apply)

- Public housing rent determination policies
- Public housing admissions policies
- Section 8 admissions policies
- Preference in admission to section 8 for certain public housing families



- Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA
- Preference/eligibility for public housing home ownership option participation
- Preference/eligibility for section 8 home ownership option participation
- Other policies (list below)

b. Economic and Social self-sufficiency programs

Yes  No: Does the PHA coordinate, promote or provide any programs to enhance the economic and social self-sufficiency of residents? (If "yes", complete the following table; if "no" skip to sub-component 2, Family Self Sufficiency Programs. The position of the table may be altered to facilitate its use.)

Services and Programs				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office/PHA main office/other provider name)	Eligibility (public housing or section 8 participants or both)

**(2) Family Self Sufficiency program/s**

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of	Actual Number of

	Participants (start of FY2000 Estimate)	Participants (As of: DD/MM/YY)
Public Housing		
Section 8		

- b.  Yes  No: If the PHA is not maintaining the minimum program size required by HUD, does the most recent FSS Action Plan address the steps the PHA plan to take to achieve at least the minimum program size?  
If no, list steps the PHA will take below:

### C. Welfare Benefit Reductions

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)

- Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies
- Informing residents of new policy on admission and reexamination
- Actively notifying residents of new policy at times in addition to admission and reexamination.
- Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
- Establishing a protocol for exchange of information with all appropriate TANF agencies
- Other: (list below)

**D. Reserved for Community Service Requirement pursuant to section 12(c) of the U.S. Housing Act of 1937**

## **13. MHA Safety and Crime Prevention Measures**

[24CFR Part 903.79(m)]

**MHA is a High Performer based on its most recent MASS score and is not required to complete this section.**

### **A. Need for measures to ensure the safety of public housing residents**

1. Describe the need for measures to ensure the safety of public housing residents (select all that apply)

- High incidence of violent and/or drug -related crime in some or all of the PHA's developments
- High incidence of violent and/or drug -related crime in the areas surrounding or adjacent to the PHA's developments
- Residents fearful for their safety and/or the safety of their children
- Observed lower -level crime, vandalism and/or graffiti
- People on waiting list unwilling to move into one or more developments due to perceived and/or actual levels of violent and/or drug -related crime
- Other (describe below)

2. What information or data did the PHA use to determine the need for PHA actions to improve safety of residents (select all that apply).

- Safety and security survey of residents
- Analysis of crime statistics over time for crimes committed "in and around" public housing authority
- Analysis of cost trends over time for repair of vandalism and removal of graffiti
- Resident reports
- PHA employee reports
- Police reports
- Demonstrable, quantifiable success with previous or ongoing anticrime/antidrug programs
- Other (describe below)

3. Which developments are most affected? (list below)

### **B. Crime and Drug Prevention activities the PHA has undertaken or plan to undertake in the next PHA fiscal year**

1. List the crime prevention activities the PHA has undertaken or plan to undertake: (select all that apply)

- Contracting with outside and/or resident organizations for the provision of crime -and/or drug -prevention activities
- Crime Prevention Through Environmental Design
- Activities targeted to at -risky youth, adults, or seniors
- Volunteer Resident Patrol/Block Watchers Program
- Other (describe below)

2. Which developments are most affected? (list below)

**C. Coordination between PHA and the police**

1. Describe the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities: (select all that apply)

- Police involvement in development, implementation, and/or ongoing evaluation of drug -elimination plan
- Police provide crime data to housing authority staff for analysis and action
- Police have established a physical presence on housing authority property (e.g., community policing office, officer in residence)
- Police regularly testify in and otherwise support eviction cases
- Police regularly meet with the PHA management and residents
- Agreement between PHA and local law enforcement agency for provision of above -baseline law enforcement services
- Other activities (list below)

2. Which developments are most affected? (list below)

**D. Additional information as required by PHDEP/PHDEP Plan**

PHA eligible for FY2000 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

- Yes  No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes  No: Has the PHA included the PHDEP Plan for FY2000 in this PHA Plan?
- Yes  No: This PHDEP Plan is an Attachment. (Attachment Filename: \_\_\_\_\_)



## **14. RESERVED FOR PET POLICY**

[24CFR Part 903.79(n)]

MHA is currently revising its pet policies (family housing and senior housing). Drafts of the policies are attached below. The policies have been distributed for comment to the Resident Advisory Board and to all Public Housing residents. Following the 30-day comment period, which will incorporate comments as appropriate, the policy will be finalized and implemented. Date of implementation will be August 1, 2003.

### **MISSOULA HOUSING AUTHORITY FAMILY HOUSING PET POLICY**

#### **EXCLUSIONS:**

The following policies do not pertain to animals that assist or provide service to persons with disabilities, referred to in this policy as "service animals." Requests for service animals will be considered on a case-by-case basis. Requests must be made in writing prior to acquisition of the animal or prior to lease-up if the animal is already owned, and accompanied by a letter from a knowledgeable professional documenting the need for the animal as a reasonable accommodation for a person with a disability.

Service animals are allowed in all units owned and managed by the Missoula Housing Authority with no restrictions other than those imposed on all tenants to maintain their units and associated facilities in a decent, safe, and sanitary manner and to refrain from disturbing their neighbors. Owners of service animals are required to be in compliance with all State and local public health, animal control, and animal anti-cruelty laws and regulations, including requirements for licensing and vaccinations. This exclusion applies to service animals that reside in public housing projects, as well as to service animals that visit these projects. Nothing in this policy:

1. Limits or impairs the rights of persons with disabilities,
2. Authorizes the Missoula Housing Authority to limit or impair the rights of persons with disabilities;
3. Affects any authority that the Missoula Housing Authority may have to regulate service animals that assist, support or provide service to persons with disabilities, under Federal, State, or local law. (CFR 24 Section 5.303)

#### **PET RULES :**

- A. You must have prior written approval from the Missoula Housing Authority before bringing any pet onto the premises. Prior to accepting a pet for residency, you must provide to MHA proof of animal's licensing,

vaccination record, proof of spaying or neutering, and the name and a photo of the animal(s). You are also required to sign a statement that you have read and received a copy of this Pet Policy and agree to comply with its provisions. Proof of licensing and vaccinations must be provided each year at the time of tenant's annual recertification.

- B. Only domesticated, common household pets will be allowed. Pets of vicious or aggressive disposition, or those with poisonous bites or stings, deemed by management to be potentially harmful to the health and safety of others are prohibited. The following types of common household pets will be permitted under the following criteria:
1. Dogs:
    - a. Only one dog is permitted
    - b. Must be 40 pounds or less when fully grown
    - c. Must be licensed by the City of Missoula
    - d. Must have proof of spay or neuter
    - e. Must have proof of all required vaccinations
    - f. Must wear a collar with license tag affixed at all times
    - g. The following breeds of dog are not allowed: Rottweilers, Pit Bulls, Doberman Pinschers, German Shepherds, or dogs of mixed -breed with identifiable characteristics specific to one of the prohibited breeds.
  2. Cats:
    - a. Only one cat is permitted
    - b. Must have proof of spay or neuter
    - c. Must have proof of all required vaccinations
    - d. Must be trained to the litter box
  3. Birds:
    - a. No more than two birds are permitted
    - b. Cages may be no larger than 4 feet high by 3 feet wide by 2 feet deep, and must have removable litter tray to permit daily cleaning.
    - c. Birds must be maintained inside of cage at all times
    - d. No birds of prey or other dangerous species are permitted.
  4. Small caged animals:
    - a. Only Guinea pigs, hamsters, gerbils, or small non -poisonous lizards are permitted.
    - b. No more than two caged animals are permitted.
    - c. Small animals must be caged at all times.
  5. Aquariums:
    - a. Must not exceed twenty (20) gallons
    - b. One aquarium is permitted
- C. A maximum of three (3) common household pets is allowed. Only one dog or one cat is allowed; the second and third pet must be caged. If there is no cat or dog, a maximum of two (2) caged pets is allowed.

- D. A non-refundable fee of \$25.00 and a refundable pet deposit of \$100.00 per cat or dog must be paid in full before the pet is brought onto the premises. The pet deposit will be refunded, along with any interest accrued, less the cost of cleaning or damages directly attributable to the pet, when the resident moves out or no longer has a pet on the premises, whichever occurs first. In cases of financial hardship, MHA may allow tenant to make a payment arrangement which requires one-half (2) of the deposit when the pet is brought onto the premises with up to three (3) months to pay the balance due.
- E. Owners of animals are required to reimburse the housing authority for the actual cost of any and all damages caused by his/her pet or service animal. If a pet deposit has been paid, damages will first be charged to the deposit. Owner is liable for any charges that exceed the amount of the pet deposit.
- F. MHA is not responsible for any action, injuries or damages caused by any tenant's animal(s). Animals are the sole responsibility of the owner. MHA assumes no liability for failure of the animal owner to control the pet. Any injury or harm to other persons, animals, or property is the sole responsibility and liability of the animal owner. It is recommended that owners purchase liability insurance for this purpose.
- G. Animals must be appropriately and effectively restrained and under the control of a responsible individual at all times when not inside the resident's unit. When outside the unit, dogs must be on a hand-held leash and under the owner's control at all times.
- H. Pets shall use common areas inside a building only for the purpose of passing to the outside of the building, except for service animals.
- I. Tenant is fully and solely responsible for promptly cleaning up and properly disposing of any waste or droppings, both inside and outside of their units. Pet waste must be bagged and disposed of in appropriate trash receptacles. Repeated failure by a resident to take responsibility for waste disposal shall be deemed a violation of the lease.
- J. Tenant shall take adequate precautions to keep the dwelling unit and surrounding areas free of pet odors, insect infestation, waste and litter, and maintain unit in a sanitary condition at all times.
- K. No unauthorized animal(s) may visit or be harbored in any unit owned by the MHA without prior written approval. Tenants are prohibited from feeding stray or wild animals (the exception, common birds that feed at bird feeders). Feeding of wild animals or strays shall constitute having a pet without permission.

- L. No animal will be allowed that constitutes an nuisance or threat to any tenant or detracts from any tenant's quiet enjoyment of their unit or the common areas of the complex. A nuisance or threat includes, but is not limited to, noise, smell, animal waste, and aggressive or vicious behavior.
- M. In the event your dog, cat, or other mammal bites an individual, you must report the event to the appropriate city police and/or health officials and the Housing Authority within twenty-four (24) hours of the bite.
- N. Tenants shall not alter the premises, including the unit, patio, or common area to create an enclosure for an animal, without express written permission from MHA management.
- O. If pets or service animals are left unattended for 24 hours or more, the MHA reserves the right to enter and remove the animal(s) and transfer them to the proper authority.
- P. If the health or safety of an animal is threatened by the death or incapacity of the owner, or by other factors that render the animal owner unable to care for the animal, the tenant agrees that MHA has permission to enter the owner's unit, remove the animal, and place it in a facility that will provide care and shelter. MHA will take every precaution to place the animal in a reputable well-known facility, however MHA is not responsible for the care of the animal after the placement is made.
- Q. An applicant who rejects an offer of housing because of a refusal to comply with the pet policy will not be allowed a "good cause" exception. All applicants are subject to the pet policy and may not move in with a pet that is not in compliance with this policy.
- R. An animal which displays vicious, dangerous, intimidating behavior, displays symptoms of severe illness, or demonstrates behavior that constitutes an immediate threat to the health or safety of others, shall be referred by MHA to the appropriate state or local entity authorized to remove such animals. Such animals are subject to immediate removal from the premises.
- S. Violation of any of the foregoing rules will result in a two-week notice to remove the animal from the premises. If this notice is disregarded, a thirty-day eviction notice will be issued.



**MISSOULA HOUSING AUTHORITY  
SENIOR HOUSING  
PET POLICY**

**EXCLUSIONS:**

The following policies do not pertain to an animal that assists or provides service to persons with disabilities, referred to in this policy as "service animals." Requests for service animals will be considered on a case-by-case basis. Requests must be made in writing prior to acquisition of the animal or prior to lease-up if the animal is already owned, and accompanied by a letter from a knowledgeable professional documenting the need for the animal as a reasonable accommodation for a person with a disability.

Service animals are allowed in all units owned and managed by the Missoula Housing Authority with no restrictions other than those imposed on all tenants to maintain their units and associated facilities in a decent, safe, and sanitary manner and to refrain from disturbing their neighbors. Owners of service animals are required to be in compliance with all State and local public health, animal control, and animal anti-cruelty laws and regulations, including requirements for licensing and vaccinations. This exclusion applies to service animals that reside in public housing projects, as well as to service animals that visit these projects. Nothing in this policy:

1. Limits or impairs the rights of persons with disabilities,
2. Authorizes the Missoula Housing Authority to limit or impair the rights of persons with disabilities;
3. Affects any authority that the Missoula Housing Authority may have to regulate service animals that assist, support or provide service to persons with disabilities, under Federal, State, or local law. (CFR 24 Section 5.303)

**PET RULES :**

- A. You must have prior written approval from the Missoula Housing Authority before bringing any pet onto the premises. Prior to accepting a pet for residency, you must provide to MHA proof of animal's licensing, vaccination record, proof of spaying or neutering, and the name and a photo of the animal(s). You are also required to sign a statement that you have read and received a copy of this Pet Policy and agree to comply with its provisions. Proof of licensing and vaccinations must be provided each year at the time of tenant's annual recertification.
- B. Only domesticated, common household pets will be allowed. Pets of vicious or aggressive disposition, or those with poisonous bites or stings, deemed by management to be potentially harmful to the health and safety of others are prohibited. The following types of common household pets will be permitted under the following criteria:

1. Dogs:
  - a. Only one dog is permitted
  - b. Must be 40 pounds or less when fully grown
  - c. Must be licensed by the City of Missoula
  - d. Must have proof of spay or neuter
  - e. Must have proof of all required vaccinations
  - f. Must wear a collar with license tag affixed at all times
  - g. The following breeds of dog are not allowed: Rottweilers, Pit Bulls, Doberman Pinschers, German Shepherds, or dogs of mixed -breed with identifiable characteristics specific to one of the prohibited breeds.
2. Cats:
  - a. Only one cat is permitted
  - b. Must have proof of spay or neuter
  - c. Must have proof of all required vaccinations
  - d. Must be trained to the litter box
3. Birds:
  - a. No more than two birds are permitted
  - b. Cages may be no larger than 4 feet high by 3 feet wide by 2 feet deep, and must have removable litter tray to permit daily cleaning.
  - c. Birds must be maintained inside of cage at all times
  - d. No birds of prey or other dangerous species are permitted.
4. Small caged animals:
  - a. Only Guinea pigs, hamsters, gerbils, or small non-poisonous lizards are permitted.
  - b. No more than two caged animals are permitted.
  - c. Small animals must be caged at all times.
5. Aquariums:
  - a. Must not exceed twenty (20) gallons
  - b. One aquarium is permitted

- C. A maximum of three (3) common household pets is allowed. Only one dog or one cat is allowed; the second and third pet must be caged. If there is no cat or dog, a maximum of two (2) caged pets is allowed.
- D. A refundable pet deposit of \$100.00 per cat or dog must be paid in full before the pet is brought onto the premises. The pet deposit will be refunded, along with any interest accrued, less the cost of cleaning or damages directly attributable to the pet, when the resident moves out or no longer has a pet on the premises, whichever occurs first. In cases of financial hardship, MHA may allow tenant to make a payment arrangement which requires one-half (2) of the deposit when the pet is brought onto the premises with up to three (3) months to pay the balance due. (The pet deposit rule does not apply to pets in senior housing before the implementation date of this policy.)

- E. Owners of animals are required to reimburse the housing authority for the actual cost of any and all damages caused by his/her pet or service animal. If a pet deposit has been paid, damages will first be charged to the deposit. Owner is liable for any charges that exceed the amount of the pet deposit.
- F. MHA is not responsible for any action, injuries or damages caused by any tenant's animal(s). Animals are the sole responsibility of the owner. MHA assumes no liability for failure of the animal owner to control the pet. Any injury or harm to other persons, animals, or property is the sole responsibility and liability of the animal owner. It is recommended that owners purchase liability insurance for this purpose.
- G. Animals must be appropriately and effectively restrained and under the control of a responsible individual at all times when not inside the resident's unit. When outside the unit, dogs must be on a hand-held leash and under the owner's control at all times.
- H. Pets shall use common areas inside a building only for the purpose of passing to the outside of the building, except for service animals.
- I. Tenant is fully and solely responsible for promptly cleaning up and properly disposing of any waste or droppings, both inside and outside of their units. Pet waste must be bagged and disposed of in appropriate trash receptacles. Repeated failure by a resident to take responsibility for waste disposal shall be deemed a violation of the lease.
- J. Tenant shall take adequate precautions to keep the dwelling unit and surrounding areas free of pet odors, insect infestation, waste and litter, and maintain unit in a sanitary condition at all times.
- K. No unauthorized animal(s) may visit or be harbored in any unit owned by the MHA without prior written approval. Tenants are prohibited from feeding stray or wild animals (the exception, common birds that feed at bird feeders). Feeding of wild animals or strays shall constitute having a pet without permission.
- L. No animal will be allowed that constitutes an nuisance or threat to any tenant or detracts from any tenant's quiet enjoyment of their unit or the common areas of the complex. An nuisance or threat includes, but is not limited to, noise, smell, animal waste, and aggressive or vicious behavior.
- M. In the event your dog, cat, or other mammal bites an individual, you must report the event to the appropriate city police and/or health officials and the Housing Authority within twenty-four (24) hours of the bite.

- N. Tenant shall not alter the premises, including the unit, patio, or common area to create an enclosure for an animal, without express written permission from MHA management.
- O. If pets or service animals are left unattended for 24 hours or more, the MHA reserves the right to enter and remove the animal(s) and transfer them to the proper authority.
- P. If the health or safety of an animal is threatened by the death or incapacity of the owner, or by other factors that render the animal owner unable to care for the animal, the tenant agrees that MHA has permission to enter the owner's unit, remove the animal, and place it in a facility that will provide care and shelter. MHA will take every precaution to place the animal in a reputable well-known facility, however MHA is not responsible for the care of the animal after the placement is made.
- Q. An applicant who rejects an offer of housing because of a refusal to comply with the pet policy will not be allowed a "good cause" exception. All applicants are subject to the pet policy and may not move in with a pet that is not in compliance with this policy.
- R. An animal which displays vicious, dangerous, intimidating behavior, displays symptoms of severe illness, or demonstrates behavior that constitutes an immediate threat to the health or safety of others, shall be referred by MHA to the appropriate state or local entity authorized to remove such animals. Such animals are subject to immediate removal from the premises.
- S. Violation of any of the foregoing rules will result in a two-week notice to remove the animal from the premises. If this notice is disregarded, a thirty-day eviction notice will be issued.

## **15. Civil Rights Certifications**

[24CFR Part 903.79(o)]

Civil rights certifications are included in the MHA Plan Certifications of Compliance with the PHA Plans and Related Regulations.

## **16. Fiscal Audit**

[24CFR Part 903.79(p)]

1.  Yes  No: Is the PHA required to have an audit conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h))? (If no, skip to component 17.)
2.  Yes  No: Was the most recent fiscal audit submitted to HUD?
3.  Yes  No: Were there any findings as the result of that audit?
4.  Yes  No: If there were any findings, do any remain unresolved? If yes, how many unresolved findings remain? \_\_\_\_\_
5.  Yes  No: Have responses to any unresolved findings been submitted to HUD? If not, when are they due (state below)?

## **17. MHA Asset Management**

[24CFR Part 903.79(q)]

**MHA is a High Performer based on its most recent MASS score and is not required to complete this section.**

1.  Yes  No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock, including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have **not** been addressed elsewhere in this PHA Plan?
2. What types of asset management activities will the PHA undertake? (select all that apply)
- Not applicable
  - Private management
  - Development-based accounting
  - Comprehensive stock assessment
  - Other: (list below)

***Development-based budgeting.***

***In conjunction with the City and County of Missoula, University of Montana, and District XI Human Resource Development Council, Portfolio/Master Plan, including assessment of current housing stock, long-term needs, and highest and best use of capital acquired through HUD-approved disposition of 45 public housing units.***

3.  Yes  No: Has the PHA included descriptions of asset management activities in the **optional** Public Housing Asset Management Table?

**18. Other Information**

[24CFR Part 903.79(r)]

**A. Resident Advisory Board Recommendations**

1.  Yes  No : Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?

***No comments were received.***

2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)

- Attached as Attachment (Filename)
- Provided below:

3. In what manner did the PHA address those comments? (select all that apply)

- Considered comments, but determined that no changes to the PHA Plan were necessary.
- The PHA changed portions of the PHA Plan in response to comments  
List changes below:
- Other: (list below)

**B. Description of Election process for Residents on the PHA Board**

1.  Yes  No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub -component C.)
2.  Yes  No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub -component C.)

**3. Description of Resident Election Process**

- a. Nomination of candidates for place on the ballot: (select all that apply)

- Candidates were nominated by resident and assisted family organizations
- Candidates could be nominated by any adult recipient of PHA assistance
- Self-nomination: Candidates registered with the PHA and requested a place on ballot
- Other: (describe): Under State Law, commissioners are appointed**



b. Eligible candidates: (select one)

- Any recipient of PHA assistance
- Any head of household receiving PHA assistance
- Any adult recipient of PHA assistance
- Any adult member of a resident or assisted family organization
- Other (list): any adult Public Housing resident**

c. Eligible voters: (select all that apply)

- All adult recipients of PHA assistance (public housing and section 8 tenant-based assistance)
- Representatives of all PHA resident and assisted family organizations
- Other (list): City -wide election**

### C. Statement of Consistency with the Consolidated Plan

1. Consolidated Plan jurisdiction: **City of Missoula**

2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)

- The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.**
- The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.**
- The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)**
- Other: (list below)**

*Assist homeless by increasing and/or expanding availability of transitional housing opportunities, and supportive services.*

*Increase and preserve the supply of affordable rental units for low and moderate income households, including special needs persons, to include rehabilitation and new construction.*

*Increase and preserve affordable homeownership for low and moderate income households, including special needs persons*

*Further investigate and develop an action plan to address community wide barriers to affordable housing and barriers to fair housing compliance.*

*Increase accessibility*

4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

***Portfolio Master Plan, incorporating an analysis of impediments to affordable housing was started in FY2003 and will be completed in FY 2004. City will contribute \$20,000 to cost of Master Plan study.***

## D. Other Information Required by HUD

### Membership of Resident Advisory Board

#### Public Housing Residents

Debbie Miller  
2323 Mount  
Missoula, MT 59802  
721-5712

Elaine Miller  
1319 W. Broadway, #309  
Missoula, MT 59802  
327-8330

Morris "Chuck" Hossfeld  
1319 E. Broadway, #415  
Missoula, MT 59802  
327-9993

Clara Higgins  
1319 E. Broadway, #211  
Missoula, MT 59802  
728-6420

#### Shelter Plus Care

Julie J. Jacobsen  
2333 Agnes #2  
Missoula, MT 59801  
542-7608

Mark Trafton  
149 W. Broadway, #416  
Missoula, MT 59802  
259-1465

#### Section 8 Voucher

Joyce Chicoine  
527 W. Alder #C206  
Missoula, MT 59802  
728-2287

Christiana Florentino  
115534<sup>th</sup> St., #226  
Missoula, MT 59801

Karlyn Jaosch  
1405 E. Broadway, J201  
Missoula, MT 59802  
549-1417

Thelma Holderman  
2420 Burlington, #222  
Missoula, MT 59801  
542-8488

Thelma Holderman  
2420 Burlington, #222  
Missoula, MT 59801  
542-8488

Monica Calvin  
P.O. Box 2294  
Missoula, MT 59806  
543-9949

Joseph Pietro  
122534<sup>th</sup> St., #333  
Missoula, MT 59801  
721-4265

Melody Gilbert  
149 W. Broadway, #27  
Missoula, MT 59802  
549-2209

Peggy Pearce  
1405 E. Broadway, L106  
Missoula, MT 59802  
542-3429

Martha LaBash  
2840 Santa Fe Ct., #222  
Missoula, MT 59808

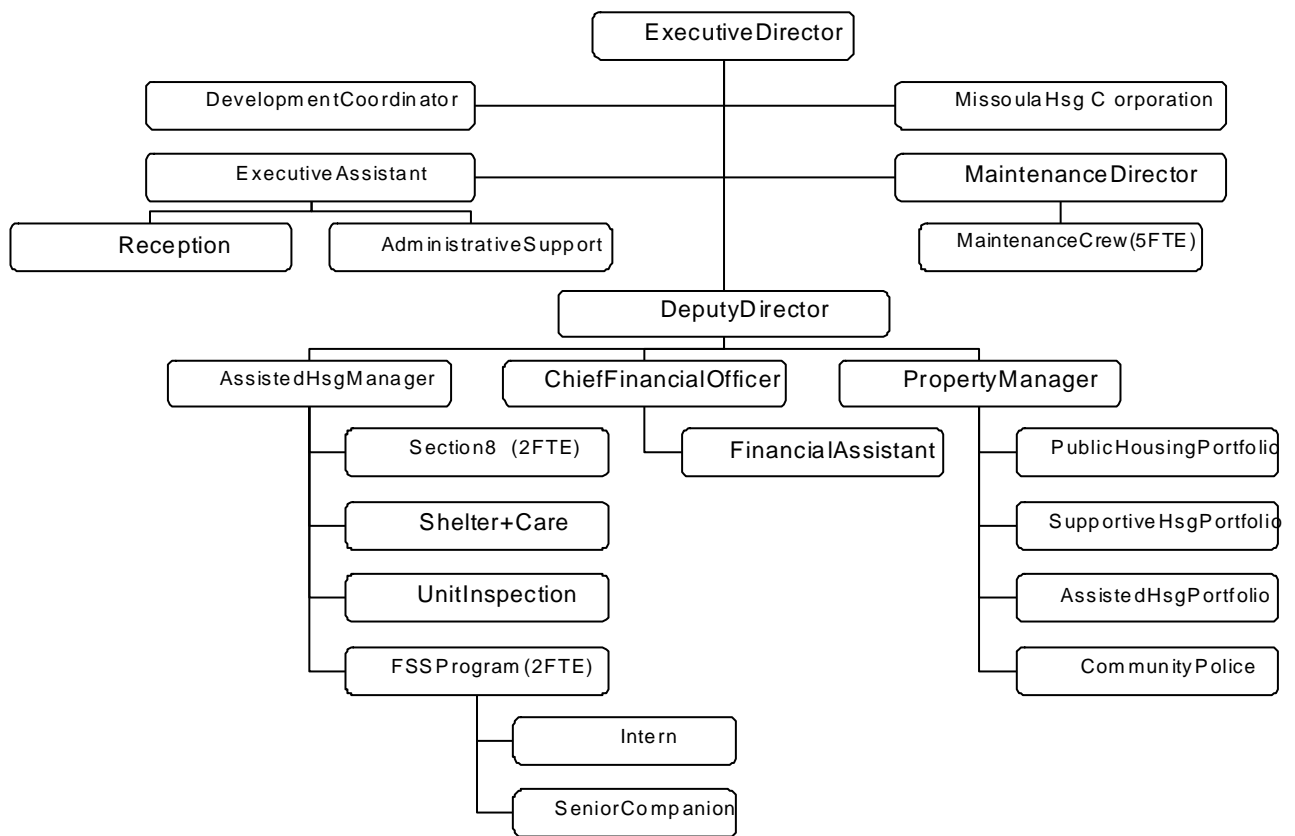
### **Definition of Major Change**

The Missoula Housing Authority considers a major change in the content of the Housing Agency Plan to consist of one or more of the following:

1. New waiting list preference criteria.
2. Implementation of program incentives to increase the number of working households in the program.
3. A change in any open Annual Capital Program that crosses the accumulative 25% of total fund threshold.
4. A decision to submit a major application such as a Demolition/Disposition, Allocation for Designated Housing or HOPEV application.
5. A decision to request a voluntary conversion of public housing to Section 8 vouchers.

# MISSOULA HOUSING AUTHORITY

## ORGANIZATIONAL CHART





# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

<b>PHAName:</b> Missoula Housing Authority	<b>Grant Type and Number</b> Capital Fund Program Grant No: MT06 -P033-501-03 Replacement Housing Factor Grant No:	<b>Federal FY of Grant:</b> 2003
---	--	-------------------------------------

Original Annual Statement  
  Reserve for Disasters/Emergencies  
  Revised Annual Statement (revision no: )  
**Performance and Evaluation Report for Period Ending:**  
  Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds				
2	1406 Operations	50,000	200,000		
3	1408 Management Improvements	50,000	30,000		
4	1410 Administration	50,000	27,976		
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	25,000	35,000		
8	1440 Site Acquisition				
9	1450 Site Improvement	30,000	4,500		
10	1460 Dwelling Structures	175,000	77,225		
11	1465.1 Dwelling Equipment — Nonexpendable		7,080		
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment		22,500		
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	380,000	404,281		
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security — Soft Costs				
25	Amount of Line 21 Related to Security — Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part II: Supporting Pages**

PHAName: Missoula Housing Authority		Grant Type and Number Capital Fund Program Grant No: MT06-P033-501-03 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA-Wide	Operations	1406		50,000	200,000			
PHA-Wide	Administration	1410		50,000	27,976			
PHA-Wide	Management Improvements	1408		50,000	30,000			
PHA-Wide	Fees and Costs	1430		25,000	35,000			
PHA-Wide	Landscaping/Play Equipment	1450		10,000	0			
PHA-Wide	Concrete/Deck Repair	1450		10,000	4,500			
PHA-Wide	Sewer/Water Line Replacement	1450		0	0			
PHA-Wide	Site Lighting/Security	1450		0	0			
PHA-Wide	Fencing	1450		10,000	0			
PHA-Wide	Modular Turnover (floors, cabs, etc.)	1460		175,000	50,000			
PHA-Wide	Exterior Painting	1460			10,000			
PHA-Wide	Exterior Siding	1460						
PHA-Wide	Roofs/Shakes/Shingles/Gutters	1460			0			
PHA-Wide	Furnaces/Water Heaters	1460			2,000			
PHA-Wide	Windows/Doors/Garage Doors	1460			15,225			
PHA-Wide	Appliances/Furniture	1465			7,080			
PHA-Wide	Storage/Sheds	1470						
PHA-Wide	Vehicles/Equipment	1475			22,500			



**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part III: Implementation Schedule**

PHAName: Missoula Housing Authority	Grant Type and Number Capital Fund Program Grant No: MT06-P033-501-03 Replacement Housing Factor Grant No:	Federal FY of Grant: 2003
--	--	---------------------------

Development Number Name/HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
HA-wide	9/05			9/07			
MT33 -1	9/05			9/07			
MT33 -2	9/05			9/07			
MT33 -3	9/05			9/07			
MT33 -9	9/05			9/07			
MT33 -11	9/05			9/07			
MT33 -12	9/05			9/07			
MT33 -14	9/05			9/07			
MT33 -18	9/05			9/07			

# CapitalFundProgramFive -YearActionPlan PartI:Summary

PHANName		MISSOULAHOUSINGAUTHORITY		<input checked="" type="checkbox"/> Original5 -YearPlan <input type="checkbox"/> RevisionNo:	
Development Number/Name/H A-Wide	Year1	WorkStatementforYear2 FFYGrant:2004 PHAFY E:9/30/2005	WorkStatementforYear3 FFYGrant:2005 PHAFYE:9/30/2006	WorkStatementforYear4 FFYGrant:2006 PHAFYE:9/30/2007	WorkStatementforYear5 FFYGrant:2007 PHAFYE:9/30/2008
	Annual Statement				
HA-WIDE		\$1 70,000	\$120,000	\$105,000	\$105,000
MT33 -1		7,000	10,000	10,000	10,000
MT33 -2		25,000	20,000	30,000	20,000
MT33 -3		80,000	55,000	25,000	25,000
MT33 -9		60,000	80,000	100,000	100,000
MT33 -11		20,000	20,000	15,000	10,000
MT33 -12		20,000	20,000	15,000	10,000
MT33 -14		8,000	5,000	5,000	5,000
MT33 -18		5,000	5,000	5,000	5,000
A/E		\$25,000	20,000	15,000	15,000





<b>Annual Statement/Performance and Evaluation Report</b>					
<b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary</b>					
<b>PHA Name:</b> Missoula Housing Authority MT033		<b>Grant Type and Number</b> Capital Fund Program Grant No: MT06-P033-50100 Replacement Housing Factor Grant No:			<b>Federal FY of Grant:</b> FY2000
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies Revised Annual Statement (revision no: 3)					
<input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 03/31/2003 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total on-CFP Funds				
2	1406 Operations	105,533	202,695.15	202,695.15	202,695.15
3	1408 Management Improvements				
4	1410 Administration	80,000	62,544.85	62,544.85	62,544.85
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	15,000	0	0	0
8	1440 Site Acquisition				
9	1450 Site Improvement	79,000	26,731.11	26,731.11	26,731.11
10	1460 Dwelling Structures	151,500	151,110.46	151,110.46	148,385.17
11	1465.1 Dwelling Equipment — Nonexpendable	22,000	20,250.99	20,250.99	20,250.99
12	1470 Nondwelling Structures	50,000	0	0	0
13	1475 Nondwelling Equipment	13,000	52,700.44	52,700.44	50,700.44
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	516,033	516,033	516,033	513,307.71
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security — Soft Costs				
25	Amount of Line 21 Related to Security — Hard Costs	15,000	0	0	0
26	Amount of line 21 Related to Energy Conservation Measures				

Annual Statement/Performance and Evaluation Report								
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)								
Part II: Supporting Pages								
PHAName: Missoula Housing Authority		Grant Type and Number Capital Fund Program Grant No: MT06 -P033-50100 Replacement Housing Factor Grant No:				Federal FY of Grant: FY2000		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
<i>Downtown</i>								
<b>MT33-001</b>	<b>Site Improvements</b>	<b>1450</b>						
	Install underground sprinkler at 1028 Toole, Spruce	<b>1450</b>		5,000.00	3,944.11	3,944.11	3,944.11	
	Site concrete repair	<b>1450</b>		0.00	0.00	0.00	0.00	
	<b>Site Improvement Summary</b>			5,000.00	3,944.11	3,944.11	3,944.11	
<i>10 Units</i>	<b>Dwelling Structures</b>	<b>1460</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
<i>24 Bedrms</i>								
	<b>Dwelling Equipment</b>	<b>1465</b>		<b>0.00</b>	<b>0.00</b>	0.00	0.00	
	<b>MT33-001 Summary</b>			<b>5,000.00</b>	<b>3,944.11</b>	<b>3,944.11</b>	<b>3,944.11</b>	Complete
<i>Vantage Villa</i>	<i>1319 E. Broadway</i>							
<b>MT33-002</b>	<b>Site Improvements</b>							
<i>1 Bldg</i>	Site concrete repair	<b>1450</b>		0.00	0.00	0.00	0.00	
<i>38 Units</i>								
<i>38 Bedrooms</i>	<b>Dwelling Structures</b>	<b>1460</b>						
	Carpet Installation	<b>1460</b>		16,725.00	16,725.00	16,725.00	16,725.00	
	<b>Dwelling Equipment</b>	<b>1465.</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
	<b>MT33-002 Summary</b>			<b>16,725.00</b>	<b>16,725.00</b>	<b>16,725.00</b>	<b>16,725.00</b>	Complete
<i>Scattered Sites</i>	<b>Site Improvements</b>							
<b>MT33-003</b>	Site concrete repair	<b>1450</b>		0.00	0.00	0.00	0.00	
<i>14 Buildings</i>	Playground Equipment/landscaping	<b>1450</b>		22,787.00	22,787.00	22,787.00	22,787.00	
	<b>Site Improvement Summary</b>			22,787.00	22,787.00	22,787.00	22,787.00	Complete

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHAName: Missoula Housing Authority		Grant Type and Number Capital Fund Program Grant No: MT06 -P033-50100 Replacement Housing Factor Grant No:				Federal FY of Grant: FY2000		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
50 Units	<b>Dwelling Structures</b>	<b>1460</b>						
107 Bedrms	Re-side Pullman (multi-family)	<b>1460</b>		21,000.00	23,300.00	23,300.00	23,330.00	In Progress
	<b>Dwelling Equipment</b>	<b>1465</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
	<b>MT33-003 Summary</b>			<b>43,787.00</b>	<b>46,087.00</b>	<b>46,087.00</b>	<b>46,087.00</b>	
Single Family	<i>Scattered: Rattlesnake, W. Central, Kensington</i>							
<b>MT33-008</b>	<i>Kent, S. 3rd W., S. 14th W., Sussex, Gharrett</i>							
12 Bldgs	<b>Site Improvements</b>	<b>1450</b>						
12 Units	Site concrete repair	<b>1450</b>		0.00	0.00	0.00	0.00	
40 Bedrms	<b>Dwelling Structures</b>	<b>1460</b>		<b>0.00</b>	<b>0.00</b>	0.00	0.00	
	<b>Dwelling Equipment</b>	<b>1465</b>		<b>0.00</b>	<b>0.00</b>	0.00	0.00	
	<b>MT33-008 Summary</b>			<b>0.00</b>	<b>0.00</b>	0.00	0.00	
Toole Site								
<b>MT33-009</b>	<b>Site Improvements</b>	<b>1450</b>						
6 Bldgs	New fence, o.s. storage @ Toole MF site	<b>1450</b>		0.00	0.00	0.00	0.00	
15 Units	Site concrete repair	<b>1450</b>		0.00	0.00	0.00	0.00	
53 Bedrms								
	<b>Dwelling Structures</b>	<b>1460</b>						
	Re-side Phillips duplex (1613 & 1609)	<b>1460</b>		18,000.00	18,000.00	18,000.00	18,000.00	
	Replace exterior windows at Phillips duplex	<b>1460</b>		3,500.00	0.00	0.00	0.00	

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHAName: Missoula Housing Authority		Grant Type and Number Capital Fund Program Grant No: MT06 -P033-50100 Replacement Housing Factor Grant No:				Federal FY of Grant: FY2000		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	<b>Dwelling Equipment</b>	<b>1465</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
	<b>MT33-009 Summary</b>			<b>21,500.00</b>	<b>18,000.00</b>	<b>18,000.00</b>	<b>18,000.00</b>	Complete
<i>South Hills</i>	<i>Scattered: SF, Duplex &amp; 4 -plex (3 &amp; 4 bedrooms)</i>							
<b>MT33-011</b>	<b>Site Improvements</b>	<b>1450</b>						
<i>17 Bldgs</i>	Replaced deck @ 2244 E. Vista	<b>1450</b>		0.00	0.00	0.00	0.00	
<i>25 Units</i>	Site concrete repair	<b>1450</b>		0.00	0.00	0.00	0.00	
<i>80 Bedrooms</i>								
	<b>Dwelling Structures</b>							
	Re-side SF houses: 28 Russell Park	<b>1460</b>		12,000.00	8,000	8,000	8,000.00	In Progress
	36 Russell Park							
	<b>Dwelling Equipment</b>	<b>1465</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
	<b>MT33-011 Summary</b>			<b>12,000.00</b>	<b>8,000.00</b>	<b>8,000.00</b>	<b>8,000.00</b>	
<i>South Hills</i>	<i>Scattered: SF, Duplex &amp; 5 -plex</i>							
<b>MT33-012</b>	<b>Site Improvements</b>	<b>1450</b>						
<i>12 Bldgs</i>	Repair deck at 52 Russell Park	<b>1450</b>		0.00	0.00	0.00	0.00	
<i>25 Units</i>	Site concrete repair	<b>1450</b>		0.00	0.00	0.00	0.00	
<i>76 Bedrms</i>								
	<b>Dwelling Structures</b>							
	Upgrade windows at Russell Park	<b>1460</b>		25,000.00		0.00	0.00	
	Re-side SF houses: 52 Russell Pk, 2328 W. Summit, 39 Russell Park	<b>1460</b>		6,000.00	14,000	14,000	<b>11,284.71</b>	
	<b>Dwelling Equipment</b>	<b>1465</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	



Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHAName: Missoula Housing Authority		Grant Type and Number Capital Fund Program Grant No: MT06 -P033-50100 Replacement Housing Factor Grant No:			Federal FY of Grant: FY2000			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	<b>MT33-012 Summary</b>			<b>31,000.00</b>	<b>14,000.00</b>	<b>14,000.00</b>	11,284.71	
<i>Single Family</i>	<i>Scattered: 3&amp;3 bedroom in South Hills &amp; elsewhere</i>							
<b>MT33-014</b>	<b>Site Improvements</b>	<b>1450</b>					0.00	
30 Bldgs	Repair decks at 2311 W. Summit, 5614 Hillview	1450		0.00	0.00			
30 Units	Sire concrete repair	1450		0.00	0.00			
34 Bedrooms								
	<b>Dwelling Structures</b>							
	Reside SF house: 2235 E. Vista	1460		6,000.00	0.00	0.00	0.00	
	<b>Dwelling Equipment</b>	<b>1465</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
	<b>MT33-014 Summary</b>			<b>6,000.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
<i>Single Family</i>	<i>Grandview: 5SF, 3bedr units</i>							
<b>MT33-018</b>	<b>Site Improvements</b>	<b>1450</b>						
5 Bldgs	Site concrete repair	1450		0.00	0.00			
5 Units								
15 Bedrms	<b>Dwelling Structures</b>	<b>1460</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
	<b>Dwelling Equipment</b>	<b>1465</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
	<b>MT33-018 Summary</b>			<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>HA-WIDE</b>	<b>Operations</b>							
	Technical Support (computer upgrades)	1406		1,680.13	1,680.13	1,680.13	1,680.13	
	PH Leasing/Marketability	1406		887.00	887.00	887.00	887.00	

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHAName: Missoula Housing Authority		Grant Type and Number Capital Fund Program Grant No: MT06 -P033-50100 Replacement Housing Factor Grant No:				Federal FY of Grant: FY2000		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
				195,891.65	197,974.90	197,974.90	197,974.90	
	PH Personnel Salaries	1406		1,756.67	1,756.67	1,756.67	1,756.67	
	Cellphone charges	1406		396.45	396.45	396.45	396.45	
	Window Covering replacement	1406						
	<b>Operations Summary</b>	<b>1406</b>		<b>200,611.90</b>	<b>202,695.15</b>	<b>202,695.15</b>	<b>202,695.15</b>	Complete
<b>HA-WIDE</b>	<b>Administration</b>							
	Proportion of Salaries for CEO, F.O., SPMgr,							
	Maint. Supv., admin support	1410		62,461.72	62,544.85	62,544.85	62,544.85	
	<b>Administration Summary</b>	<b>1410</b>		<b>62,461.72</b>	<b>62,544.85</b>	<b>62,544.85</b>	<b>62,544.85</b>	Complete
<b>HA-WIDE</b>	<b>Fees and Costs</b>							
	HA-Wide Energy Audit	1430		15,000.00	0.00	0.00	0.00	
	<b>Fees and Costs Summary</b>	<b>1430</b>		<b>15,000.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>HA-WIDE</b>	<b>Dwelling Structures</b>							
	Replace garage doors -est. 10	1460		0.00	0.00	0.00	0.00	
	Flooring replacement allowance	1460		6,016.00	44,149.20	44,149.20	44,149.20	In Progress
	Painting	1460		1,152.38	1,152.38	1,152.38	1,152.38	Complete
	Cabinet Replacement	1460		22,020.00	25,783.88	25,783.88	25,783.88	In Progress
	<b>Dwelling Structures Summary</b>	<b>1460</b>		<b>29,188.38</b>	<b>71,085.46</b>	<b>71,085.46</b>	<b>71,085.46</b>	
<b>HA-WIDE</b>	<b>Dwelling Equipment</b>							
	Appliance Replacement	1465		22,000.00	20,250.99	20,250.99	20,250.99	Complete
	<b>Dwelling Equipment Summary</b>	<b>1465</b>		<b>22,000.00</b>	<b>20,250.99</b>	<b>20,250.99</b>	<b>20,250.99</b>	
<b>HA-WIDE</b>	<b>Non-dwelling Structures</b>	<b>1470</b>						
	PH Offices -Russell Square	1470		0.00	0.00	0.00	0.00	
	<b>Non-dwelling Structures Summary</b>	<b>1470</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>HA-WIDE</b>	<b>Non-Dwelling Equipment</b>							
	Sale & replacement vehicle/inspection vehicle	1475		13,000.00	12,066.00	12,066.00	12,066.00	Complete

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHAName: Missoula Housing Authority		Grant Type and Number Capital Fund Program Grant No: MT06 -P033-50100 Replacement Housing Factor Grant No:				Federal FY of Grant: FY2000		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	Copy machine	1475		11,271.00	11,271.00	11,271.00	11,271.00	Complete
	Office equipment & furniture	1475		15,000.00	16,167.44	16,167.44	16,167.44	In Progress
	Maintenance Vehicle	1475		11,488.00	13,196.00	13,196.00	13,196.00	Complete
	<b>Non-Dwelling Equipment Summary</b>	<b>1475</b>		<b>50,759.00</b>	<b>52,700.44</b>	<b>52,700.44</b>	<b>52,700.44</b>	
<b>HA-WIDE</b>	<b>TOTAL</b>			<b>380,021.00</b>	<b>409,276.89</b>	<b>409,276.89</b>	<b>409,276.89</b>	
	<b>GRAND TOTAL: 2000 CAP FUND</b>			<b>516,033.00</b>	<b>516,033.00</b>	<b>516,033.00</b>	<b>513,317.71</b>	

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part III: Implementation Schedule**

PHAName: Missoula Housing Authority		<b>Grant Type and Number</b> Capital Fund Program No: MT06 -P033-50100 Replacement Housing Factor No:				<b>Federal FY of Grant:</b> FY2000	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
33-001	3/2002		3/2002	12/2002		3/2002	
33-002	3/2002		3/2002	12/2002		3/2002	
33-003	3/2002		3/2002	12/2002		3/2003	
33-008	3/2002		3/2002	12/2002		3/2002	
33-009	3/2002		3/2002	12/2002		3/2002	
33-011	3/2002		3/2002	12/2002			
33-012	3/2002		3/2002	12/2002		3/2002	
33-014	3/2002		3/2002	12/2002		3/2002	
33-018	3/2002		3/2002	12/2002		3/2002	
HA-WIDE	3/2002		3/2002	12/2002		7/2003	

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Missoula Housing Authority		Grant Type and Number Capital Fund Program Grant No: MT06 -P033-50101 Replacement Housing Factor Grant No:			Federal FY of Grant: FY2001
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 2 ) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 03/31/2003 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non -CFP Funds				
2	1406 Operations	331,754	225,724	225,724.00	225,724.00
3	1408 Management Improvements				
4	1410 Administration	36,862	36,862	36,862.00	36,862.00
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs		100,000	27,435.40	27,435.40
8	1440 Site Acquisition				
9	1450 Site Improvement	14,000	10,000	0	0
10	1460 Dwelling Structures	103,120	118,750	61,263.99	61,263.99
11	1465.1 Dwelling Equipment — Nonexpendable	23,600	15,000	7,739.00	7,739.00
12	1470 Non Dwelling Structures				
13	1475 Non Dwelling Equipment	17,000	20,000	12,995.40	12,995.40
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	526,336	526,336	372,019.79	372,019.79
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

Annual Statement/Performance and Evaluation Report									
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)									
Part II: Supporting Pages									
PHAName: Missoula Housing Authority			Grant Type and Number Capital Fund Program Grant No: MT06 -P033-50101 Replacement Housing Factor Grant No:				Federal FY of Grant: FY2001		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work	
				Original	Revised	Funds Obligated	Funds Expended		
<i>Vantage Villa</i>	<i>1319 E. Broadway</i>								
<b>MT33-002</b>	<b>Site Improvements</b>	<b>1450</b>							
<i>1 Bldg</i>	Fencing	<b>1450</b>		\$6,000.00	\$10,000.00	\$0.00	\$0.00		
<i>38 Units</i>	<b>Site Improvements Summary</b>			<b>\$6,000.00</b>	<b>\$10,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>		
<i>38 Bedrooms</i>	<b>Dwelling Structures</b>	<b>1460</b>							
	Cabinet/Countertop Replacement	<b>1460</b>		\$24,500.00	\$7,100.00	330.00	330.00		
	Media Room	<b>1460</b>		\$6,000.00	\$0.00				
	<b>Dwelling Structures Summary</b>			<b>\$30,500.00</b>	<b>\$7,100.00</b>	<b>\$330.00</b>	<b>\$330.00</b>		
	<b>Dwelling Equipment</b>	<b>1465</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>		
	<b>MT33-002 Summary</b>			<b>\$36,500.00</b>	<b>\$17,100.00</b>	<b>\$330.00</b>	<b>\$330.00</b>		
<i>Scattered Sites</i>	<b>Site Improvements</b>								
<b>MT33-003</b>									
<i>14 Buildings</i>									
<i>50 Units</i>	<b>Dwelling Structures</b>	<b>1460</b>							
<i>107 Bedrms</i>	Siding 1320 Butte/730 N. 6 <sup>th</sup> / 920 Pullman				\$35,000.00	\$12,408.10	\$12,408.10		
	<b>Dwelling Equipment</b>	<b>1465</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>		
	<b>MT33-003 Summary</b>			<b>\$0.00</b>	<b>\$35,000.00</b>	<b>\$12,408.10</b>	<b>\$12,408.10</b>		
<i>Single Family</i>	<i>Grandview: 5SF, 3bedr units</i>								
<b>MT33-018</b>	<b>Site Improvements</b>	<b>1450</b>							
<i>5 Bldgs</i>	Fencing	<b>1450</b>		\$8,000.00	\$0.00	<b>\$0.00</b>	<b>\$0.00</b>		
<i>5 Units</i>									

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHAName: Missoula Housing Authority		Grant Type and Number Capital Fund Program Grant No: MT06 -P033-50101 Replacement Housing Factor Grant No:				Federal FY of Grant: FY2001		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
15 Bedrms	<b>Dwelling Structures</b>	1460		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>Dwelling Equipment</b>	1465		\$0.00	\$0.00	\$0.00	\$0.00	
	<i>MT33-018 Summary</i>			\$8,000.00	\$0.00	\$0.00	\$0.00	
<b>HA-WIDE</b>	<b>Operations</b>							
	PH Personnel Salaries	1406		331,754.00	225,724.00	225,724.00	225,724.00	
	<b>Operations Summary</b>	1406		331,754.00	225,724.00	225,724.00	225,724.00	Completed
<b>HA-WIDE</b>	<b>Administration</b>							
	Proportion of Salaries for CEO, F.O., SPMgr, Maint. Supv., admin support	1410		\$36,862.00	\$36,862.00	\$36,862.00	\$36,862.00	
	<b>Administration Summary</b>	1410		\$36,862.00	\$36,862.00	\$36,862.00	\$36,862.00	Completed
<b>HA-WIDE</b>	<b>Fees and Costs</b>							
	Professional fees	1430		\$0.00	100,000.00	\$27,435.40	\$27,435.40	
	<b>Fees and Costs Summary</b>	1430		\$0.00	100,000.00	\$27,435.40	\$27,435.40	
<b>HA-WIDE</b>	<b>Dwelling Structures</b>							
	Modatt turnover (inc. floors/cabinets)	1460		\$0.00	\$53,000.00	\$2,117.60	\$2,117.60	
	Flooring			\$0.00	\$0.00	\$26,040.00	\$26,040.00	
	Siding	1460		\$7,000.00	\$17,650.00			
	Furnaces	1460		\$6,000.00	\$6,000.00			
	Cabinet/Countertop Replacement	1460		\$59,620.00	\$0.00	\$20,368.29	\$20,368.29	
	<b>Dwelling Structures Summary</b>	1460		\$72,620.00	\$76,650.00	\$48,525.89	\$48,525.89	
<b>HA-WIDE</b>	<b>Dwelling Equipment</b>							
	Appliances			\$23,600.00	\$15,000.00	\$7,739.00	\$7,739.00	

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHAName: Missoula Housing Authority		Grant Type and Number Capital Fund Program Grant No: MT06 -P033-50101 Replacement Housing Factor Grant No:				Federal FY of Grant: FY2001		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	<b>Dwelling Equipment Summary</b>	<b>1465</b>		<b>\$23,600.00</b>	<b>\$15,000.00</b>	<b>\$7,739.00</b>	<b>\$7,739.00</b>	
<b>HA-WIDE</b>	<b>Non-dwelling Structures</b>	<b>1470</b>						
	<b>Non-dwelling Structures Summary</b>	<b>1470</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>HA-WIDE</b>	<b>Non-Dwelling Equipment</b>							
	Truck -Maintenance	<b>1475</b>		\$10,000.00	\$0.00	\$0.00	\$0.00	
	Computers/Office Equip	<b>1475</b>		\$7,000.00	\$20,000.00	\$12,995.40	\$12,995.40	
	<b>Non-Dwelling Equipment Summary</b>			<b>\$17,000.00</b>	<b>\$20,000.00</b>	<b>\$12,995.40</b>	<b>\$12,995.40</b>	
<b>HA-WIDE</b>	<b>TOTAL</b>			<b>481,836.00</b>	<b>474,236.00</b>	<b>359,281.69</b>	<b>359,281.69</b>	
	<b>GRAND TOTAL: 2001 CAP FUND</b>			<b>526,336.00</b>	<b>526,336.00</b>	<b>372,019.79</b>	<b>372,019.79</b>	





Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: <b>Missoula Housing Authority</b>		Grant Type and Number Capital Fund Program Grant No: MT06 -P033-501-02 Replacement Housing Factor Grant No:			Federal FY of Grant:  2002
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:    )					
X Performance and Evaluation Report for Period Ending: 03/31/2003 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non -CFP Funds				
2	1406 Operations	200,000		92,487.74	92,487.02
3	1408 Management Improvements				
4	1410 Administration	25,000			
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	30,000			
8	1440 Site Acquisition				
9	1450 Site Improvement	72,000			
10	1460 Dwelling Structures	167,503			
11	1465.1 Dwelling Equipment —Nonexpendable	10,000			
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	20,000			
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 -20)	514,503		92,487.74	92,487.92
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security —Soft Costs				
25	Amount of Line 21 Related to Security —Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part II: Supporting Pages**

PHAName: Missoula Housing Authority		<b>Grant Type and Number</b> Capital Fund Program Grant No: MT06 -P033-501-02 Replacement Housing Factor Grant No:				<b>Federal FY of Grant:</b> 2002		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA-Wide	Operations	1406		200,000		92,487.74	92,487.74	
PHA-Wide	Administration	1410		25,000				
PHA-Wide	Management Improvements	1408						
PHA-Wide	Fees and Costs	1430		20,000				
PHA-Wide	Landscaping/Play Equipment	1450		40,000				
PHA-Wide	Concrete/Deck Repair	1450		18,000				
PHA-Wide	Sewer/Water Line Replacement	1450		5,000				
PHA-Wide	Site Lighting/Security	1450		1,000				
PHA-Wide	Fencing	1450		8,000				
PHA-Wide	Modat Turnover (floors, cabs, etc.)	1460		86,503				
PHA-Wide	Exterior Painting	1460		35,000				
PHA-Wide	Exterior Siding	1460						
PHA-Wide	Roofs/Shakes/Shingles/Gutters	1460		4,000				
PHA-Wide	Furnaces/Water Heaters	1460		6,000				
PHA-Wide	Windows/Doors/Garage Doors	1460		36,000				
PHA-Wide	Appliances/Furniture	1465		10,000				
PHA-Wide	Storage/Sheds	1470						
PHA-Wide	Vehicles	1475						
PHA-Wide	Maintenance Tools/Equipment	1475						
PHA-Wide	Office Equipment/Computers	1475		20,000				

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part III: Implementation Schedule**

PHAName: Missoula Housing Authority			Grant Type and Number Capital Fund Program Grant No: MT06 -P033-501-02 Replacement Housing Factor Grant No:			Federal FY of Grant: 2002	
Development Number Name/HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
HA-wide	9/04			9/06			
MT33 -1	9/04			9/06			
MT33 -2	9/04			9/06			
MT33 -3	9/04			9/06			
MT33 -9	9/04			9/06			
MT33 -11	9/04			9/06			
MT33 -12	9/04			9/06			
MT33 -14	9/04			9/06			
MT33 -18	9/04						

## RASS Follow -up Plan

The MHA's Resident Assessment Survey identified one area with a score low enough to require a Follow -up Plan, Neighborhood Appearance. This appears to be tied to issues of curb appeal and making the development seem less like public housing and more in keeping with neighborhood standards.

This last year, four (4) homes were sided with vinyl siding, two were repainted, and one was stained. The dividing concrete blocks between fifteen town-homes at Russell Park West painted. 102, 100, and 920 Pullman multi -family buildings received new vinyl siding. This site also acquired ADA approved playground equipment in 2001. This year we are scheduled to paint our three multi -family buildings at our Toole site. Our intention is to also replace the decorative shake shingles on the side of both buildings at our 4<sup>th</sup> Street multi -family site. Additionally, this summer the Authority is planning to install a decorative wrought - iron fence around the Vantage Villa.

The Authority has budgeted resources in its Capital Fund Program and its operating budget for landscaping upgrades and intends to improve or expand parking to the extent that existing sites permit. In addition, the Authority intends to assess each of the family developments' ability to site ADA compliant play equipment. At the current time with the exception of MT33 -003, none of the play equipment located near our sites is MHA owned.

# Statement of Accomplishments FY2003

Please note that *Accomplishments for FY2003* are itemized below in initial type.

## I. MAXIMIZE QUALITY AND REACH OF MHA AFFORDABLE HOUSING PROGRAMS

### A. Operate existing housing programs for residents, program participants, and applicants in an efficient, effective, and equitable manner.

1. Develop quality control systems to assure that resident satisfaction is high and that MHA is delivering maintenance in a cost-effective manner.
  - Started development of a client satisfaction survey to be conducted by Masters Degree Social Work students.
  - Developed a work program for the Maintenance Department to better track work orders so cost-effectiveness can be better measured.
2. Supplement basic staff complement with open purchase contracts for skilled maintenance services to address mismatches in workload and staffing levels.
  - Completed Physical Needs Assessment to assist in development and implementation of preventative maintenance program.
  - Sent staff to procurement training to increase efficiency with contract administration, and receive thorough price estimates.
3. Develop a system of benchmark performance measurements and standards that provides key comparable indicators to the private sector real estate standards. Train existing and new employees to meet benchmarks in general maintenance.
  - In discussion with consultants to help provide those management indicators.
4. Analyze the feasibility of expanded use of private management companies for different components of MHA's portfolio in terms of overall cost effectiveness and complexity of implementation.
5. Structure a portion of MHA's rental housing so that it will serve population that the private market cannot provide for, including the elderly, disabled, and smaller households.
  - Purchasing Uptown Motel to serve the needs of disabled, homeless single persons (SRO).
  - Currently bidding the design of a project on Reserve Street to provide transitional housing.
  - Purchasing the Joseph Residence to stabilize that location for transitional housing.
  - Applying for \$5 million to build 40 new units for elderly residents.

- Received funding for renewal of 50 Shelter Plus Care units.
  - Applied for funding for renewal of 50 Shelter Plus Care units.
  - Applied for funding for new allocation of 26 new Shelter Plus Care units.
  - Currently working with Abt Associates to create a Missoula City and County Master Plan Portfolio to identify current housing stock, impediments to fair and affordable housing, and investment strategies for future stock.
6. Standardize physical plant, parts and systems to permit easy repairs and quicker response to maintenance needs.
    - Moving towards larger purchases of appliances to be able to standardize the parts.
    - Completing inventory and evaluation of all property to determine replacement needs.
  7. Revise the Housing Quality Standard to increase health and safety requirements that will ensure that Section 8 housing is safe while maintaining a high supply of available rental units.
  8. Improve the grievance hearing process by training non -staff members such as students from the University of Montana to serve as hearing officers or provide assistance to residents appearing at hearings.
    - Trained practicum students as ombudsmen and to serve as hearing officers for both PH and Section 8 programs.
  9. Establish a preventive maintenance program to improve unit competitiveness and decrease the time between vacancy and re-renting units.
    - Contracted for Physical Needs Assessment to assist in development of program.
  10. Establish a protocol to ensure that MHA stays current with program changes and takes advantage of regulatory waivers and other opportunities.
  11. Work towards obtaining Moving to Work designation or receiving similar waiver that provides for flexible operations.

**B. Implement development -specific strategies that coordinate physical improvements and redesign, market niche, level of affordability, form of ownership and means required to obtain resources to execute strategy.**

1. Develop in-house capacity to create redevelopment program that combine multiple sources of funding, especially program that do not rely on Sale and Replacement funds as a major source of funding.
  - Providing training to staff in August to complete this task.
2. Provide ongoing technical assistance to the leadership of the Resident Advisory Board (RAB) for a better understanding of management and mixed finance technical issues.
  - Retained services of consultant in April who evaluated our client services and made recommendations for improvements.





developments of a size and scale that is in keeping with the neighborhood and of the highest architectural design.

- Purchased Uptown Motel to renovate into 14 unit SRO for homeless individuals.
  - Conducting feasibility analyses on a number of properties as they come available - whether vacant land, quality existing structures, or units that must be demolished.
9. Further develop plan for affordable housing to be built on Orchard Promenade site.
- Selected architects to go forward with 16 units and a community center on this site.
10. Further develop plan for affordable housing to be built on Franklin Street site.
- Selected architects to go forward with 6 to 8 (duplex) units on this site.
11. Complete plans for the substantial modernization of the exterior of the Toole Street project.
- Currently working with the City and an architect to remove the warehouse and parking, and replace it with landscaped area.
  - Meeting with abutting property owners to initiate a program to improve the neighborhood.
  - Attempted to purchase the corner motel in order to redevelop the property.
12. Complete the renovations and construction of additional units on the Vantage Villas site.
- New fence surrounding Vantage Villa to be installed Summer 2003.
  - Replacement application submitted to HUD; awaiting approval to begin bidding process.
  - Completed design work.
13. Develop a plan for a higher and better use of the Speedway Avenue properties. s.
14. Seek additional sources of funds from local, State, Federal entities as well as major institutions and foundations in order to add improvements to MHA developments.
- Received \$500,000 HOME grant for Uptown SRO.
  - Received \$577,800 Continuum of Care grant for Uptown SRO
  - Applied for \$105,00 from the Affordable Home Program from the Federal Reserve Bank of Seattle.
  - Applied for \$568,000 in tax credits for new development off Reserve Street.
  - Received FSS Renewal Grant of \$70,718 for two coordinators.
  - Applied for FSS renewal funding for three coordinators (to add homeownership coordinator.)
15. Work with business and for-profit corporations to provide subsidized housing through such mechanisms as tax credits or special governmental and non-governmental sources .

- ❑ Partnered with KOA Development to submit 2003 Tax Credit Application for Great Northern Way.
  - ❑ In discussion w/property owner in East Missoula for 2004 Tax Credit application.
- 16. Partner with existing providers of subsidized housing to improve the availability of housing units, maintain high quality management and maintenance, and financial solvency.
- 17. Create alliances with Missoula's neighborhood councils and foster joint planning and better community relationships.
  - ❑ Attending neighborhood council meetings in neighborhoods where we are purchasing property or planning development activities.
  - ❑ Working with neighborhood on design items.
  - ❑ Actively participating in At-Risk Housing Coalition meetings.
- 18. Pursue bond funding to make progress on capital improvement plans for portfolio reengineering.
- 19. Shift MHA-owned property towards multi-family configuration.
  - ❑ Contracted for Physical Needs Assessment to evaluate status of presently owned single family homes
- 20. Work with the City of Missoula to locate public facilities on or near public housing sites so that Supportive and Community Service agencies can be close to public housing residents.
- 21. Partner with local CDC's and others to acquire, renovate, and hold property to enable the use of those properties for affordable homeownership opportunities.
  - ❑ Working with the North Missoula Community Development Corporation to analyze property located on Cedar St., between West Broadway and the Clark Fork River, and determine if purchase is feasible.
  - ❑ Currently working with local architect to conduct feasibility analysis of property located in River Road neighborhood.
  - ❑ Worked with member of Franklin to Fort leadership team to choose architecture firm for 9<sup>th</sup> Street property.
- 22. Explore constructing or purchasing of homes to sell to Section 8 Homeownership voucher holders.
- 23. Provide for sufficient training to enable MHA to become Missoula's tax credit property management specialist for its and other tax credit properties.
  - ❑ Provided tax credit compliance training to staff in May.
  - ❑ 4 staff members are C3P certified.
  - ❑ Planning for continuing education for LIHTC continued certification.
- 24. Negotiate with the City of Missoula and others to obtain tax foreclosed or other publicly held properties that can be rehabilitated to add affordable housing in the community.

25. Establish policies and procedures for a Project -based Section 8 Program to judiciously allot project -based section 8 vouchers to support development and rehabilitation of neighborhoods, promote homeownership, and rehabilitate and build additional affordable housing.
  - Consultant has provided sample application, RFP, and contract documents.
  - Development staff currently being trained on program.
  - Outreach and education of the public and landlords on the need and benefit of Section 8 housing.
26. Establish loan pools for use by non -profits or to be loaned directly to clients for acquisition and rehabilitation of property, and to fund necessary predevelopment work.
  - Established \$300,000 loan pool for use by NMCDC to purchase and rehabilitate property on the north and west sides to maintain homeownership.
  - CDBG Essential Access grant money (revolving loan fund) being recycled into new loans for security/utility deposits as original loans are repaid by clients.
27. Restructure MHA's headquarters building to provide additional office space and a more readily accessible space.
  - Sound panels being installed to reduce noise and increase privacy.
  - On-going redesign of various offices for optimal usage.
28. Explore a new location for MHA's offices that will permit additional expansion space and that will locate the facility closer to other governmental entities and support services including the use of some of the premises for market rate office space to help defer the cost of construction and operation.
29. Continue to assess MHA's scattered site properties to ensure they are meeting the demands for housing and match with our waiting list.
  - Assessment being conducted through Master Planning process.
30. Dispose of those MHA properties that no longer support MHA's mission or that, through their disposal, offer expanded opportunities for affordable housing or reinforce MHA's mission, and reuse MHA property that meet the same goal.
  - Assessment being conducted through Master Planning process.
31. Locate a new warehouse that will replace the facility located currently at the Toole site and the rental property on Schilling.
  - RFP in progress for new warehouse to be constructed on MHA-owned (non-public housing) property so that warehouse on Toole site can be removed for site improvements and rented space on Schilling can be released.
32. Supplement staff capacity through the use of consultants, architects and engineers, and fee accountants and other professionals to reduce staff expenses while obtaining the information necessary to make decisions regarding the management and operations of MHA.

**C. Develop Client Service Center to assist PHA and Section 8 applicants and program participants with MHA administrative requirements and processing. The Service Center will also serve as ombudsmen for program participants having bureaucratic difficulties and as liaison to resident organizations.**

- This has been achieved to the degree recommended by consultant Andrew Daniels. PH and Section 8 remain as separate departments, though meet weekly at a client services meeting. Recertifications are being done with greater uniformity between the two departments. We have achieved greater cohesion between the two programs and FSS.
1. Implement applicant and new resident orientation and training programs that are supported by the MHA lease or condition of lease approval.
    - Updated application form.
    - Added additional time for orientation.
    - Made orientation mandatory.
    - Plans to improve and revise the content of orientation are underway.
    - Involving Resident Advisory Board in updating orientation.
  2. Create customer service procedures for tracking contacts to identify areas for operational improvement.
  3. Complete transition to Central File System within Service Center that will contain all applicant and program participant files and information.
    - Central file system completed.
  4. Implement the use of technology such as scannable forms and electronic records to reduce data inputting needs and paper files.
    - Developing and implementing scanning system to electronically index and archive all closed files.
    - Working with WEX Program (Job Service work experience program), who will be providing volunteer labor to complete "paperless" archives.
  5. Create and improve MHA website to provide information about MH Programs and the ability to contact MHA staff for submit requests for pre-application through the Internet.
    - Hired resident consultant to develop website with ability to link users to other sites, access available rental property records, submit applications electronically.
  6. Develop comprehensive housing search database covering city and local suburbs that can be accessed via the Internet.
    - Working closely with local property managers and landlords to link website to their available property records.
  7. Explore use of video, other media to improve communications with customers.
    - Developing slide presentations that can be used with overhead projector or Powerpoint projector for orientations, briefings, and public relations.
  8. Modify the Administrative Plan and Admissions and Continued Occupancy Policies as needed to support these goals and objectives, to match HUD requirements or best practices, or to meet local market needs.
    - Revision of administrative policies is continuing. Changes are being presented to Board of Commissioners, HUD Denver, and/or tenants as required, for comment and approval, and are outlined in the Annual Plan. Other

modifications are to create more readable, better organized documents, without substantive changes. Courtesy copies will be provided to HUD Denver when final revisions are completed.

**D. Promote deconcentration of poverty and diversity in all aspects of MHA programs while providing the maximum degree of choice to participants. This will require development of reporting systems that track MHA program demographics by census tract.**

1. Expand development-based waiting lists to MHA family development thus making all MHA properties developments of choice.
2. Use MHA demographic information to coordinate with City Planning Office's capacity to create GIS maps and other visual tools to assess the relationship of MHA developments and Section 8 Program utilization to each census tract and neighborhood.
3. Develop quarterly reporting system that trends basic demographics for each development and each MHA waiting list.
4. Coordinate with the annual cycle for development of the Housing Agency Plan any modifications to waiting list selection and inter and intra-program transfer policies to promote program diversity.
5. Provide Section 8 vouchers for relocation linked to development or improvement of property that receives MHA investment, or in support of the development or purchase of affordable housing.
6. Revise MHA's lease and tenant handbook.
  - Members of RAB to assist MHA in revising tenant handbook.
  - Tenant handbook and Admissions & Continued Occupancy Plan being revised to implement new pet and service animal policies.
7. Apply for such additional Section 8 vouchers or other rents subsidies that can be applied in Missoula or a larger jurisdiction that promote deconcentration of poverty.

**E. Develop security strategies for each MHA development that assure stable and safe communities.**

1. Develop, in collaboration with each family development and the Missoula Police Department, an expanded security awareness program.
  - PH program has begun quarterly safety meetings for PH tenants
2. Continue the development of rapid intervention tools for problem households including non-trespass orders, mandatory training programs for house cleaning, and court-stipulated agreements.
3. Expand relationships with federal and local inter-agency task force to directly address locations of drug activities including use of undercover operations.
4. Strengthen lease enforcement for drug related and other criminal activity.
  - Drug activity in PH units has been eliminated or driven underground.
  - Recommend to Board of Commissioners budget item to include family counseling services for our tenants like those provided by Employee Assistance Program APS.
5. Continue to support and expand the current Community Police program.



4. Meet with local banks and lenders to explain the new abilities of the Section 8 Program. Determine the feasibility of a loan pool supported by a consortium of banks to share risk and Community Reinvestment Act (CRA) credit.
  - Held two meetings with bankers/lenders.

## **II. IMPROVE MANAGEMENT SYSTEMS**

### **A. Complete transition to new integrated management information system**

1. Continue integration of a new computer system into MHA operations, including refinement of comprehensive reporting on program utilization, performance indicators, income and expense information, program demographics, and a variety of operational activities such as rent collection, eviction process, work orders, etc.
  - Integration complete; creation and implementation of reports in progress.
  - Fully utilizing capacity of work order program to monitor maintenance time and materials, document type of work with work codes.
2. Refine and expand Intranet system to facilitate internal communication and access to approved policies, procedures, forms and other management tools.
  - Inter-office scheduling and email fully operational.
  - Suggestion box files created for inter-office sharing of policies, procedures, meeting agendas, etc.
3. Complete upgrade to new Windows version of Tenmast Software when available and provide training to staff.
  - Completed conversion to Windows-based software for all modules.
  - Brought Tenmast trainer on site for two-day training with staff.

### **B. Implement and sustain employee evaluation procedures to provide fair and accurate assessments of staff based upon utilization of skills, quality of work, job knowledge, supervisory initiative and aptitude, efficiency of execution, and ability to perform in a manner that supports agency goals and objectives.**

1. Refine and expand policies and procedures for annual and interim employee evaluations.
2. Revise MHA's personnel policies to reflect current practices in the industry and to meet local customs and practices.
  - Personnel policy manual currently being revised, with input from attorney, Board of Commissioners and staff; implementation projected for August 2003.
3. Develop appropriate evaluation criteria for each type of position on an "include but not limited to" basis.
4. Determine the feasibility of a performance based bonus system tied to meeting department goals and objectives and implement such a program if feasible. This system would have to avoid FLSA pay rate complications regarding "quid pro quo" bonus arrangements and also be limited in fiscal

years during which the financial position of the Authority makes such payments not prudent.

5. Train supervisors and employees on evaluation system and its objectives.
6. Enroll and offer courses through Nan McKay and similar vendors to provide updated training opportunities through either on-line or on-site venues.
7. Investigate and partner with similar agencies to contract for human resource management services.

#### **C. Increase financial accountability of MHA operations and increase reserves.**

1. Refine Departmental Budgets and reporting to better define and clarify MHA overhead factors.
2. Develop Service Contract cycles and bidding systems.
  - Issued RFPs, followed by contracts for provision of labor and materials for carpet and vinyl replacement through Dec. 2004.
  - Entered into contract for security services at Vantage Villa.
3. Develop system to monitor in-house and contract vacancy turnover program on both cost and quality.
  - Maintenance supervisor directly responsible for inspection of turnover units prior to lease-up to ensure all necessary and requested work has been done in a timely, efficient, and cost-effective manner.
  - Modernized warehouse and inventory controls to account for decentralized staff materials needs.
  - Implemented a Fixed Asset Tagging System
4. Modernize warehouse and inventory control to account for decentralized staff materials needs.
5. Maintain reserves to meet industry standards.
  - Reserves meet industry standards for Public Housing & Section 8.

#### **D. Establish Internal Audit Function**

1. Have Deputy Director develop monthly reports to cover PHAS and SEMAP items and provide a snapshot of agency status.
  - In progress.
2. Formalize an agency performance reporting system that would compile operational and financial information into a series of monthly, quarterly and semi-annual reports that can support analysis of budgets and internal planning activities.
  - In progress.
3. Develop file protocols for each department and program that define the data elements to be retained as part of the agency's official files. This should include whether these data elements are paper or electronic, who has right of access or ability to modify this information (which therefore include MIS security), and a procedural system for file purging and long-term retention of records. This initiative needs to be coordinated with the implementation of a central file system for the Service Center.



4. Develop capacity for random audit of program files for both Section 8 and Public Housing Programs. This requires file pull to review regulatory and procedural compliance of 5% to 10% of a program on an annual basis.
  - ❑ Hired part-time temporary HQS inspector to provide 5% quality control inspections for Section 8 units.
  - ❑ Assigned file reviews for Section 8 to Assisted Housing Manager.
  - ❑ Assigned file reviews for Public Housing to Property Manager.

**E. Maximize MHA income streams to support core mission to the maximum extent feasible.**

1. Continue work on energy performance contracting program to maximize cost savings under PFS incentive program. Use creative finance mechanisms such as performance contracting to finance improvements "off-budget".
  - ❑ Contracted with consultant to perform preliminary energy audit.
  - ❑ Providing training for staff in August on energy performance contracting.
2. Explore and implement a tax -credit property management effort to attract contracts from other owners of tax -credit properties.
  - ❑ 4 staff members are C3P certified.
  - ❑ Planning for continuing education for LIHTC continued certification.
3. Create system to assess, promote and monitor residents in transition from welfare to-work or from marginal employment to a living wage.
4. Continue expanding and refining risk management programs and staff safety training in order to mitigate and lessen insurance claims therefore leading to a reduction of insurance premiums.
  - ❑ Researching preventive and corrective maintenance procedures for dealing with mold problems, with goal to implement policies and procedures to reduce liability.
5. Explore adjusting the Fair Market Rents in Missoula as set by HUD and other budget and payment standards to more correctly reflect the low supply, high demand, and rapidly increasing prices.
6. Identify and develop new revenue producing businesses for the Housing Authority such as subordination or third party property management contracts.
7. Seek public/private partnerships with community businesses and existing social service providers, to leverage MHA resources as well as increase the scope of grantsmanship.
  - ❑ HUD Section 202 Grant for the elderly submitted with Missoula Aging Services and Missoula Housing Corporation on Development Team.
8. Seek corporations or community groups who are interested in "adopting" a MHA development. This to provide stronger relationships between MHA residents and the Missoula community and would include recreational activities, special projects, mentoring and other programs that develop leadership skills and provide role models to MHA program participants.

9. Implement direct deposit payments of HAP to landlords.

### **III. BUILD COMMUNITY AND SELF -SUFFICIENCY THROUGH MHA PROGRAMS**

#### **A. Improve self-sufficiency effort to help people in public housing move towards employment and home ownership, through coordination with outside agencies, which provides services.**

1. Complete initial needs assessment \ perceptions survey.
  - The initial FSS intake form was redesigned to include 3 distinct sections and be more client friendly.
2. Develop and implement system to track household job readiness and impediments to employment from unit or subsidy offer throughout of the residents' participation in MHA programs.
  - After a demographic study, develop a survey that includes input from households, community employment case managers and Vocational Rehabilitation.
3. Develop support systems for the transition from welfare to work or from marginal employment to livable wage.
  - Created partnerships with collaborative agencies such as Community Management Team (employment-related), Missoula Area Coordinated Employment Network (disability-related), Round Table (basic education and life skills-related) and The Resource Network (family and social service-related)
  - Presenting to Board and RAB proposal to contract for counseling services, including family or individual counseling, financial counseling, simple legal advice for public housing residents, free of charge, in the same format as an Employee Assistance Plan.
4. Design and implement Individual Savings Accounts (ISA) accounts to assist resident in saving monies that would have otherwise gone to pay rent but are exempted under HUD and MHA policies.
5. Continue to develop the Family Self-Sufficiency Program. Seek to be fully enrolled at 100 Section 8 participants and 15 Public Housing participants by fiscal year end.
  - As of June 2003, 66 Section 8 participants and 11 Public Housing participants.
6. Develop Memoranda of Agreement with supportive service providers to formalize their assistance to our residents and to provide a mechanism that would enable the development of supportive housing.

#### **B. Utilize non-profit subsidiary to design, implement and administer all MHA social service programs. These programs are to be supportive in nature and rely on established third party entities to provide direct services.**

1. Non-profit subsidiary will seek funds on MHA's behalf through grantsmanship and partnering.

2. MHA shall coordinate and facilitate delivery of community -based supportive services to tenants with emphasis on basic life skills;
3. Non-profit subsidiary will coordinate all social service entities seeking access to MHA's developments including requests for programming space and access to residents.
4. MHA supportive service programs shall distinguish between those who can attain independence from public assistance and those are likely to require more permanent housing and design and deliver services accordingly;

**C. Strengthen Section 3 efforts**

1. Initiate a public information program on Section 3 and its new importance for organizations that want to do business with the Authority. This public information program should be included in a larger initiative to encourage local businesses to respond to MHA procurements.
  - Initiated discussions with the local Carpenter's Union to develop resident apprentice program, using Section 3 preference to encourage participation of local builders.
2. Determine the feasibility of creating a resident -controlled property management entity. This could be implemented as some form of Resident Management Corporation (RMC) or as an actual business that draws on resident participation across developments or programs.
3. Develop program to provide technical assistance to Section 3 businesses.

**D. Improve Lease Enforcement to Build Communities**

1. Develop ongoing education programs for residents, law enforcement personnel, and judicial system on MHA lease requirements, federal regulations and the operational issues that MHA must confront to assure its residents their right to quiet and peaceful enjoyment of their housing.
2. Strictly enforce lease eviction that involve criminal activity that include, drugs, guns and violence.
3. Enhance and expand community watch initiatives (Neighborhood Watch, etc.).

**E. Improve MHA's ability to intervene with at risk families**

1. Formalize referral process of families falling behind in rent to appropriate resource to assist them in budgeting and other matters.
2. Increase staff capacity to recognize when social service referrals are necessary.
  - Encourage and support relationship between property management and the social service coordinators to deal with troubled PH tenants.
  - Working with consultant to improve provision of client services.
3. Work to strengthen tenant organizations and communications so that tenants can begin to provide support to each other.
  - Researching, at request of Section 8 participants, allowing program participants to voluntarily donate to loan pool for security/utility deposits.
  - RAB producing a newsletter that will be distributed to all MHA clients.

## **VI. STRENGTHEN MHA'S PRESENCE IN THE MISSOULA COMMUNITY AS A LEADER ON AFFORDABLE HOUSING ISSUES**

1. Develop a public relations program that provides periodic press releases and arranges for other forms of access to members of the press to make certain that MHA's turn-around activities are publicly understood.
  - ❑ Contracted with local public relations firm to provide services.
  - ❑ Acknowledging staff who have been promoted internally through the Missoulian's Getting Ahead column in the Sunday edition
2. Increase Commissioners' role to include periodic attendance at public forums or press briefings at which topics pertinent to their committee are represented (e.g. a press conference concerning MHA's annual modernization program or Housing Agency Plans submission).
3. Develop an agenda of legislative changes at the federal and state level that would support MHA's redevelopment.
  - ❑ Proposed legislation to create a Blue Ribbon Committee on Affordable Housing, which passed several legislative committees but was later tabled.
4. Advocate for a state-level equivalent to the Low Income Housing Tax Credit. This type of initiative has already been implemented or has pending legislation in several states.
  - ❑ Proposed program during 2003 Legislative session. Will reintroduce at next legislative session.
5. Coordinate with the City and County of Missoula toward a unified and consistent public housing policy.
6. Champion provision of equitable housing opportunity and development of affordable housing on behalf of those least able to advocate for themselves by actively marketing its programs to the community and advocating the housing needs of low-income persons in matters of community housing policy and land use regulation.
7. Become the local expert on housing policy and affordable housing development by providing the community with quality data on housing and housing needs, educating the community about housing issues and policy, and developing a public relations and media plan focusing on those served and in need rather than on the agency.
  - ❑ Working with Abt Associates to create Portfolio Master Plan
8. Work with the Missoula Housing Corporation, Missoula Aging Service, the District XI Human Resource Council, Neighborhood Housing Services and others to explore development, joint funding, homeownership, staff sharing, and cooperative arrangements with consultants.
9. Maintain and expand participation with the At-Risk Housing Coalition to find cooperative solutions to long-term homelessness and temporary housing needs.
10. Join and become active in local organizations that promote affordable housing in Missoula and Montana such as the Chamber of Commerce and Home Builders Association.

- ❑ Joined Chamber of Commerce and Home Builders Association.

11. Become involved at the local and state levels with housing advocates to share information, training, and policies.

- ❑ Bi-weekly meetings with group of Missoula non-profit affordable housing developers.
- ❑ Members of State and Regional NAHRO.

## Project-Based Vouchers

MHA plans to convert approximately 50 - 60 tenant -based vouchers to project -based vouchers in FY2004. All voucher allocations will be open to competition within the community. The primary goals are to provide housing assistance to special populations that cannot access housing subsidies in other ways, and to provide an additional funding source to affordable housing projects that need financial assistance to succeed. Land and property costs in Missoula are prohibitive to the development of affordable housing without the added assistance that project -based vouchers can provide.

We have engaged in an active educational process over the past year with other public and social service agencies, affordable housing developers, and property owners, to increase awareness of the project -based voucher program. We have identified possible participants who would be interested in responding to a Request for Proposals, and are ready to move forward with the conversion. Specific projects will be identified based on the response to the Request for Proposals.