

# PHA Plans

5 Year Plan for Fiscal Years 200	2-2006
Annual Plan for Fiscal Year 200	3

**NOTE: THIS PHA PLAN TEMPLATE (HUD 50075) IS TO BE COMPLETED IN ACCORDANCE WITH INSTRUCTIONS LOCATED IN APPLICABLE PIH NOTICES**

## PHA Plan Agency Identification

**PHAName:** CharlestonCountyHousing&RedevelopmentAuthority

**PHANumber:** SC -056

**PHAFiscalYearBeginning:(mm/yyyy)** 07/2003

### Public Access to Information

**Information regarding any activities outlined in this plan can be obtained by contacting:(select all that apply)**

- Main administrative office of the PHA
- PHA development management offices
- PHA local offices

### Display Locations For PHA Plans and Supporting Documents

The PHA Plans (including attachments) are available for public inspection at:(select all that apply)

- Main administrative office of the PHA
- PHA development management offices
- PHA local offices
- Main administrative office of the local government
- Main administrative office of the County government
- Main administrative office of the State government
- Public library
- PHA website
- Other (list below)

PHA Plan Supporting Documents are available for inspection at:(select all that apply)

- Main business office of the PHA
- PHA development management offices
- Other (list below)

**5-YEAR PLAN**  
**PHAF ISCAL YEARS 2002-2006**  
[24CFRPart903.5]

**A.Mission**

State the PHA's mission for serving the needs of low -income, very low income , and extremely low - income families in the PHA's jurisdiction. (select one of the choices below)

The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.

X The PHA's mission is: (state mission here)

The mission of the Charleston County Housing & Redevelopment Authority is to provide quality affordable housing and assist in providing economic opportunities to the low -income citizens of Charleston County.

**B.Goals**

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHA may select any of the se goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD -suggested objectives or their own, **PHAS ARE STRONGLY EN COURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS .** (Quantifiable measures would include target sets such as: numbers of families served or PHAS scores achieved.) PHA should identify these measures in the space to the right of or below the stated objectives.

**Goal:** Provide tenant and client services, including programs, that will lead to the opportunity for self-sufficiency through focused education, home ownership, and entrepreneurship.

**Objectives:**

- I-1 Provide educational programs or referralssuch as parenting, job training, and GED, for which funding may be available.
- I-2 Network with other agencies to provide additional services which meet the needs of residents, such as Mealson Wheels and transportation.
- I-3 Provide opportunities for residents to meet community service requirements through partnerships with area organizations.
- I-4 Promote entrepreneurship through programs such as IDA.

Progress during past year includes:

**I-1.**

- Partnered with Charleston Senior Citizens Center to provide job training and to create positions such as front desk receptionist.
- During the past year, one resident was referred to Trident Literacy to complete a GED.
- Another resident returned to Trident Technical College to complete a certificate program.
- Home ownership training was conducted
- Two teams of youth ages 13 -18 were sent to summer camp as part of the Adding Basic Challenges in Development and Education (ABCDE) Programs sponsored by the Carolinas Council of Housing Redevelopment and Codes Officials.

**I-2.**

- In partnership with the Department of Social Services, 100 families participated in the Family Unification Program.
- Tele-ride services available to residents provided by CARTA .
- In partnership with the Charleston Area Regional Transportation Authority, established a bus service to our housing site in the town of Lincolnville.
- Celebration Station, a program of the Lowcountry Food Bank, provided food for CCHRA residents
- Partnered with the Trident Urban League to sponsor a summer intern program.

**I-3. Community Service requirements were suspended by the U.S. Congress in 2002.**

**I-4.**

- Entrepreneurship programs such as IDA were actively discussed with residents.
- Information on IDA placed in brochures and newsletters
- Entrepreneurship programs discussed and promoted with CCHRA Board Members, officials from Trident United Way, as well as the Charleston County Grants Administration Office.

**Goal III .** Aggressively seek new sources of funding for CCHRA initiatives, thereby reducing dependence on HUD for funding support.

**Objectives:**

- II-1. Improve communication with HUD and other agencies and organizations and increase staff knowledge in order to be better aware of alternative sources of funding.
- II -2. Evaluate carefully new potential sources of funding and apply for grants and other opportunities for which the agency may be eligible.
- II -3. Investigate the expansion of commercial space.

*Progress during the past year includes:*

**II -1.**

- *CCHRA hosted an interagency visit by the Bowling Green, Kentucky housing authority to increase mutual knowledge of operations and issues facing the two authorities.*
- *Collaborated with Trident United Way to seek ~~new~~ sources of funding for the IDA Program.*
- *CCHRA represented on the City of Charleston Mayor's Commission on Homelessness.*
- *Working with DSS' Family to Family Program, obtained funding for group homes and foster care homes in selected communities.*
- *Utilized the CCHRA Newsletter as an outward communication vehicle to HUD.*
- *Developed an agency website to enhance communication*
- *Established a linkagew with the local Grantsmanship Center to be better positioned to apply for relevant grants.*
- *Maintained contact with CCHRCO, NAHRO List Serve, and SERC about possible funding opportunities.*

**II -2.**

- *Applied and received funding from the City of Enston Homes Endowment Fund.*
- *Applied for and received a HUD grant under the Family Self-Sufficiency Program.*
- *Made application to HUD for additional Section 8 vouchers.*
- *Applied to Trident United Way for funding for a staff position under the Youth Education Program.*
- *Applied for a Community Development Block Grant from City of North Charleston.*
- *Applied for a Community Development Block Grant from Charleston County.*
- *Applied for and received 2002 Community Block Grant from Charleston County.*

**II -3.**

- *During the year, lost one tenant (Medical University of SC)*
- *Aggressively seeking new tenants by contacting area real estate brokers.*
- *Traffic Patrol Broadcasting/SC leased rooftop space for a Traffic Watch camera.*
- *Additional leaseable space may become available when Objective IV -2 and 3 are completed.*

**Goal III.** Utilize appropriate opportunities to provide housing for low-income residents.

III -1 Partner with the Lowcountry Housing & Economic Development Foundation as an avenue for new housing projects.

III -2 Pursue joint ventures with other area public housing providers.

***Progress during the last year includes:***

***III-1. Partnership is in place. Seeking opportunities for housing development. Authority owns 5 acres of land in McClellanville, which may be able to be developed if sewage service exists.***

***III-2. No action to date. Upon further investigation, goal is not realistic.***

**Goal II** Continues to improve the efficiency and effectiveness of the CCHRA Staff.

**Objectives:**

IV-1 Evaluate the adequacy of personnel staffing in light of CCHRA mission.

IV-2 Determine the feasibility of remodeling existing space as a solution to physical space constraint.

IV-3 Based on the outcome of strategy III-2, develop a plan for construction of a new administration and maintenance facility.

IV-4 Evaluate the adequacy of current tenant accounting software.

IV-5 Increase training and private sector credentialing of staff personnel.

***Progress during past year includes:***

***IV-1. Staffing review not yet accomplished. Project will be contracted upon completion of current revision to CCHRA Performance Management System.***

***IV-2&3. Jeffery Rosenblum, AIA, of Rosenblum Coe Architects, Inc. has been awarded a contract to study the feasibility of remodeling existing office space as a solution to physical space constraint. He has begun work on conceptual plan to remodel existing office space to accommodate present and future staffing needs. Based on the outcome of that study, he will then provide a conceptual plan for building a new combination maintenance and administration building on the northeast corner of current JFM property.***

***IV-4. Developing an RFP for new software. Based on response to RFP, site visits will be conducted to evaluate the new software.***

***IV-5.***

- Customer service training conducted for entire staff in June 2002***
- Karen Gorham, Public Housing Director, completed a management course at Trident Technical College.***

- *Yolanda Waring, Section 8 Director, completed Basic Supervision at Trident Technical College.*
- *Andrea Milano, Senior Accountant, completed Advanced PHA Financial Accounting Course.*
- *Henrietta Martin, Deputy Director, participating in Leadership South Carolina.*
- *Two CCHRA staff members completed Housing Quality Standards (HQS) training.*

**Goal IV** .Improve public understanding of the mission of the Charleston County Housing and Redevelopment Authority

**Objectives:**

- V-1 Continue to improve communication with Charleston County Council and the Congressional Delegation and continue to invite members to attend CCHRA Board Meetings.
- V-2 Continue to improve utilization of the media and ensure that CCHRA success stories and “good news stories” are well documented and publicized.
- V-3 Continue to improve communication with residents.
- V-4 Continue to improve communication with other public housing authorities in the region.
- V-5 Continue to improve communication with Section 8 housing landlords through the Landlords Advisory Board.
- V-6 Conduct annual events to showcase the accomplishments of CCHRA and its clients.
- V-7 Continue to increase marketing and public information programs, particularly as related to the availability of public housing.

**Progress during the past year includes:**

**V-I.**

- *Executive Director meets monthly with Charleston County Grants Administration staff*
- *Executive Director meets twice with members of County Council on housing issues*
- *Deputy Executive Director meets monthly with Leadership South Carolina*
- *CCHRA Annual Report and Newletters sent to County Council members*
- *CCHRA Annual Reports sent to Legislative Delegation*
- *Charleston City Council member Gallant attends monthly Resident Association meetings.*
- *Executive Director meets quarterly with various staff members of BCDCOG*
- *Deputy Executive Director meets monthly with Trident Workforce Investment Board Youth Council*
- *Executive Director meets monthly with Trident Workforce Investment Board*

**V -2. Article on CCHRA’s receiving NAHRO Award of Excellence published in media.**

V-3.

- *CCHRA Staff attend Resident Association meetings.*
- *Holiday Gift Giving and Halloween socials conducted.*
- *Installed a suggestion box at Joseph Floyd Manor and Brighton Place. Best suggestion of the month is highlighted and posted.*
- *Agency newsletter continues to improve and expand coverage of resident life.*
- *Resident surveys continue to be done, along with an improved follow-up process to ensure concerns are met.*

V -4. *Jackie Ketchen, Resident Services Director, and Karen Gorham, Public Housing Director, are members of the Resident Initiatives Council, a networking effort to allow local organizations to exchange ideas and plan joint activities.*

V -5. *Continuing action. Notices, letters, flyers, and newsletters are sent to landlords.*

V -6. *Junior/Senior Art Exhibitions sponsored by Housing Foundation*

V -7. *With size of CCHRA waiting list, very little public housing availability can be advertised.*



**AnnualPHAPlan**  
**PHAFiscalYear200 3**  
 [24CFRPart903.7]

**i. AnnualPlanType:**

SelectwhichtypeofAnnualPlanthePHAwillsubmit.

**StandardPlan**

**StreamlinedPlan:**

- HighPerf ormingPHA**
- SmallAgency(<250PublicHousingUnits)**
- AdministeringSection8Only**

**TroubledAgencyPlan**

**ii. ExecutiveSummaryoftheAnnualPHAPlan**

[24CFRPart903.79(r)]

Provideabriefoverview oftheinformationintheAnnualPlan,includinghighlightsofmajorinitiatives anddiscretionarypoliciesofthePHAhasincludedintheAnnualPlan.

**iii. AnnualPlanTableofContents**

[24CFRPart903.79(r)]

ProvideatableofcontentsfortheAnnualPlan ,includingattachments,andalistofsupporting documentsavailableforpublicinspection .

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**Attachments**

Indicatewhichattachmentsareprovidedbyselectingallthatapply.Provide theattachment'sname(A, B,etc.)inthespacetotheleftofthenameoftheattachment.Note:Iftheattachmentisprovidedasa **SEPARATE**filesubmissionfromthePHAPlansfile,providethefilenameinparenthesesinthespace totherightofthe title.

**Required Attachments:**

- A. Admissions Policy for Deconcentration (SC056a01)
- B. FY2002 Capital Fund Program Annual Statement
  - Most recent board -approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

**Optional Attachments:**

- C. FY2002 Capital Fund Program 5 Year Action Plan
- D. Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text) —
- X Other (List below, providing each attachment name):
  1. Resident Membership on CCHRA Governing Board (SC056b01)
  2. Membership of the Resident Advisory Board s (SC056c01)
  3. CCHRA Pet Ownership Policy —*included in text*
  4. Fiscal Year 2001 and 2002 Capital Fund Annual Statements (sc056d02 & sc056e02) Split due to size

**Supporting Documents Available for Review**

Indicate which documents are available for public review by placing a mark in the “Applicable & On Display” column in the appropriate rows. All listed documents must be on display if applicable to the program activities conducted by the PHA.

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	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	5 Year and Annual Plans

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	
X	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
X	Most recent board -approved operating budget for the public housing program	Annual Plan: Financial Resources;
X	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
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA 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; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents X check here if included in the public housing A&O Policy	Annual Plan: Rent Determination
X	Schedule of flat rents offered date each public housing development X check here if included in the public housing A&O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies X check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	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
X	Public housing grievance procedures X check here if included in the public housing A&O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures X check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD -approved Capital Fund/Comprehensive Grant	Annual Plan: Capital Needs

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	Program Annual Statement (HUD 52837) for the active grant year	
N/a	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	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
N/a	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
N/a	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
N/a	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
N/a	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
N/a	Approved or submitted public housing home ownership programs/plans	Annual Plan: Homeownership
N/a	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
X	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self -Sufficiency
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self -Sufficiency
X	Most recent self -sufficiency (ED /SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self -Sufficiency
X	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
X	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 result of the audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	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**

Based upon the information contained in the Consolidated Plan/s applicable to the jurisdiction, and/or other data available to the PHA, provide a statement of the housing needs in the jurisdiction by completing the following table. In the "Overall" Needs column, provide the estimated number of renter families that have housing needs. For the remaining characteristics, rate the impact of that factor on the housing needs for each family type, from 1 to 5, with 1 being "no impact" and 5 being "severe impact." Use N/A to indicate that no information is available upon which the PHA can make this assessment.

<b>Housing Needs of Families in the Jurisdiction by Family Type</b>							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	7,251	5	5	4	4	1	3
Income > 30% but <= 50% of AMI	4,819	4	4	4	4	2	3
Income > 50% but < 80% of AMI	4,850	3	3	4	3	2	3
Elderly	2,498	5	4	4	4	1	5
Families with Disabilities	N/A	5	3	3	5	1	5
Race/Ethnicity	N/A	4	4	3	4	2	2
Race/Ethnicity							
Race/Ethnicity							
Race/Ethnicity							

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: 2002
- 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)

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

State the housing needs of the families on the PHA's waiting list/s. **Complete one table for each type of PHA - wide waiting list administered by the PHA.** PHA may provide separate tables for site-based or sub-jurisdictional public housing waiting lists at their option.

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<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:			
	# of families	% of total families	Annual Turnover
Waiting list total	296		
Extremely low income (<=30% AMI)	214	72%	
Very low income (>30% but <=50% AMI)	82	28%	
Low income (>50% but <80% AMI)	0		
Families with children	224	76%	
Elderly families	11	4%	
Families with Disabilities	32	11%	
Race/ethnicity (Cau)	16	5%	
Race/ethnicity (A/A)	280	95%	
Race/ethnicity			
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2BR			
3BR			
4BR			

HousingNeedsofFamiliesontheWaitingList			
5BR			
5+BR			
Isthewaitinglistclosed(selectone)? <input type="checkbox"/> NoXYes			
Ifyes:			
Howlonghasitbeenclosed(#ofmonths)? 15			
DoesthePHAexpectt oreopenthelistinthePHAPlanyear?XNo <input type="checkbox"/> Yes			
DoesthePHApermitspecificcategoriesoffamiliesontothewaitinglist,evenif generallyclosed?NoX <input type="checkbox"/> Yes(Emergencyhousing)			

HousingNeedsofFamiliesonthe WaitingList			
Waitinglisttype:(selectone)			
Section8tenant -basedassistance			
XPublicHousing			
<input type="checkbox"/> CombinedSection8andPublicHousing			
<input type="checkbox"/> PublicHousingSite -Basedorsub -jurisdictionalwaiting list(optional)			
Ifused,identifywhichdevelopment/subjurisdiction:			
	#offamilies	%oftotalfamilies	AnnualTurnover
Waitinglisttotal	486		
Extremelylow income<=30%AMI	297	61%	
Verylowincome (>30%but<=50% AMI)	190	39%	
Lowincome (>50%but<80% AMI)	2	1%	
Familieswith children	374	7 7%	
Elderlyfamilies	70	15%	
Familieswith Disabilities	143	30%	
Race/ethnicity(Cau)	94	20%	
Race/ethnicity(A/A)	387	78%	
Race/ethnicity	4	1%	
Race/ethnicity	1		
Characteristicsby BedroomSize (PublicHousing)			

Housing Needs of Families on the Waiting List			
Only)			
1BR	98		
2BR	14		
3BR	357		
4BR	17		
5BR			
5+BR			
Is the waiting list closed (select one)? No Yes X (Single family 3 & 4 bedroom) If yes: How long has it been closed (# of months)? Dec 20, 2001 Does the PHA expect to open the list in the PHA Plan year? No X Yes Does the PHA permit specific categories of families on the waiting list, even if generally closed? X No Yes			

### C. Strategy for Addressing Needs

Provide a brief description of the PHA's strategy for addressing the housing needs of families in the jurisdiction and on the waiting list **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

#### (1) Strategies

##### **Need: Shortage of affordable housing for alleligible populations**

##### **Strategy 1. Maximize the number of affordable units available to the PHA within its current resources by:**

Select all that apply

- X Employee effective maintenance and management policies to minimize the number of public housing units off -line
- X Reduce turnover time for vacated public housing units
- X Reduce time to renovate public housing units
- Seek replacement of public housing units lost to the inventory through mixed financed development
- Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources
- X Maintain or increase section 8 lease -uprates by establishing payment standards that will enable families to rent throughout the jurisdiction
- X Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- X Maintain or increase section 8 lease -uprates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration



- Maintain or increase section 8 lease -uprates by effectively screening Section 8 applicants to increase owner acceptance of program
- Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- Other (list below)

**Strategy 2: Increase the number of affordable housing units by:**

Select all that apply

- Apply for additional section 8 units should they become available
- Leverage affordable housing resources in the community through the creation of mixed -finance housing
- Pursue housing resources other than public housing or Section 8 tenant -based assistance.
- Other: (list below)

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

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

Select all that apply

- 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**

Select all that apply

- 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:**

Select all that apply

- 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:**

Select all that apply

- 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)

**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:**

Select if applicable

- 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 towns ers 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 PHA'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)]

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan year. Note: the table assumes that Federal public housing or tenant-based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing support services, Section 8 tenant-based assistance, Section 8 support services or other.

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2002 grants)</b>		
a) Public Housing Operating Fund	\$ 449,852.00	
b) Public Housing Capital Fund	380,350.00	
c) HOPEVI Revitalization		
d) HOPEVI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	4,960,176.00	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	46,873.00	

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
g) Resident Opportunity and Self-Sufficiency Grants		
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>	\$583,903.00	
<b>3. Public Housing Dwelling Rental Income</b>		
	759,871 .00	Public Housing Operations
<b>4. Other income (list below)</b>		
Investment Income	6,832.00	Public Housing Operations
<b>4. Non-federal sources (list below)</b>		
Commercial space leases	64,120.00	Public Housing Operations
<b>Total resources</b>	\$7,251,977.00	

### **3. PHA Policies Governing Eligibility, Selection, and Admissions**

[24CFR Part 903.79(c)]

#### **A. Public Housing**

Exemptions: PHA that do not administer public housing are not required to complete 3A.

etesubcomponent

**(1) Eligibility**

a. When does the PHA verify eligibility for admission to public housing? (select all that apply)

- When families are within a certain number of being offered a unit: (state number)
- When families are within a certain time of being offered a unit: (state time)
- X Other: (describe):  
At the time a family has been offered a unit

b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?

- X Criminal or Drug-related activity
- X Rental history
- X Housekeeping
- Other (describe)

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

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

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

**(2) Waiting List Organization**

a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)

- X Community-wide list
- Sub-jurisdictional lists
- Site-based waiting lists
- Other (describe)

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

- X PHA main administrative office
- X PHA development/site management office
- Other (list below)

c. If the PHA plan 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 lists 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
- X Three or More

b. X 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 X No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions 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)

- X Emergencies
- Overhoused

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

c. Preferences

1. X 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 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
- High rent burden (rent is > 50 percent of income)

Other preferences: (select below)

- X 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
  - X Those enrolled currently in educational, training, or upward mobility programs
  - Household that contribute to meeting income goals (broad range of incomes)
  - Household that contribute to meeting income requirements (targeting)
  - X Those previously enrolled in educational, training, or upward mobility programs
  - Victims of reprisals or hate crimes
- Other preference(s) (list below):

3. If the PHA will employ admission preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a points system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

- 1 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
- 1 Those enrolled currently in educational, training, or upward mobility programs
- Household that contributes to meeting income goals (broad range of incomes)
- Household that contributes to meeting income requirements (targeting)
- 1 Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes

Other preference(s) (list below):

4. Relationship of preferences to income targeting requirements:

- The PHA applies preferences within income tiers
- X Not applicable: the pool of applicant families ensures 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)

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

b. How often must residents notify the PHA of changes in family composition?

(select all that apply)

- X At an annual reexamination and lease renewal
- X 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:

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**

Exemptions: PHA that do not administer section 8 are not required to complete sub -component 3B.  
**Unless otherwise specified, all questions in this section apply only to the tenant -based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

### **(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  
 Criminal and drug -related activity, more extensively than required by law or regulation  
 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)

### **(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)

- X PHA main administrative office
- Other (list below)

**(3) Search Time**

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

If yes, state circumstances below:  
If housing is difficult to find

**(4) Admissions Preferences**

a. Income targeting

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

b. Preferences

1. X 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(re ntis>50percentofincome)

Otherpreferences(selectallthatapply)

- Workingfamiliesandthoseunabletoworkbecauseofageordisability
  - Veteransandveterans'families
  - Residentswholiveand/o rworkinyourjurisdiction
  - Thoseenrolledcurrentlyineducational,training,orupwardmobilityprograms
  - Householdsthatcontributetomeetingincomegoals(broadrangeofincomes)
  - Householdsthatco ntributetomeetingincomerequirements(targeting)
  - Thosepreviouslyenrolledineducational,training,orupwardmobility programs
  - Victimsofreprisalsorhatecrimes
- X Otherpreference(s)(listbelow)
- E mergenciestemmingfromnaturalorman -madedisasters

3.IfthePHAwillemployadmissionspreferences,pleaseprioritizebyplacinga“1”in thespacethatrepresentsyourfirstpriority,a“2”intheboxrepresentingyour secondpriority ,andsoon.Ifyougiveequalweighttooneormoreofthese choices(eitherthroughanabsolutehierarchyorthroughapointsystem),placethe samenumbernexttoeach.Thatmeansyoucanuse“1”morethanonce,“2”more thanonce,etc.

DateandTime

FormerFederalpreferences

- InvoluntaryDisplacement(Disaster,GovernmentAction,ActionofHousing Owner,Inaccessibility,PropertyDisposition)
- Victimsofdomesticviolence
- Substandardhousing
- Homelessness
- Highrentburden

Otherpreferences(selectallthatapply)

- Workingfamiliesandthoseunabletoworkbecauseofageordisability
  - Veteransandveterans'familie s
  - Residentswholiveand/orworkinyourjurisdiction
  - Thoseenrolledcurrentlyineducational,training,orupwardmobilityprograms
  - Householdsthatcontributetomeetingincomegoals(broadrangeofi ncomes)
  - Householdsthatcontributetomeetingincomerequirements(targeting)
  - Thosepreviouslyenrolledineducational,training,orupwardmobility programs
  - Victimsofreprisalsorhatecrimes
1. Otherpreference(s)(listbelow):
- Emergenciestemmingfromnaturalorman -madedisasters

4. Among applicants on the waiting list with 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 ensures 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
- X Briefing sessions and written materials
- X Other (list below):  
Family Unification program

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

- Through published notices
- X Other (list below):  
Through a partnership with DSS

#### **4. PH A Rent Determination Policies**

[24 CFR Part 903.79(d)]

#### **A. Public Housing**

Exemptions: PHA that do not administer public housing are not required to complete sub -component 4A.

**(1) Income Based Rent Policies**

Describe the PHA's income based rent setting policy/ies for public housing using, including discretionary (that is, not required by statute or regulation) income disregards and exclusions, in the appropriate spaces below.

a. Use of discretionary policies: (select one)

The PHA will not employ any discretionary rent -setting policies for income based rent in public housing. Income -based rents are set at the higher of 30% of adjusted monthly income, 10% of unadjusted monthly income, the welfare rent, or minimum rent (less HUD mandatory deductions and exclusions). (If selected, skip to sub -component (2))

---or---

X The PHA employs discretionary policies for determining income based rent (If selected, continue to question b.)

b. Minimum Rent

1. What amount best reflects the PHA's minimum rent? (select one)

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

2.  Yes X No: Has the PHA adopted any discretionary minimum rent hardship exemption policies?

3. If yes to question 2, list these policies below :

c. Rents set at less than 30% than adjusted income

1.  Yes X No: Does the PHA plan to charge rents at a fixed amount or percentage less than 30% of adjusted income?

2. If yes to above, list the amounts or percentages charged and the circumstances under which these will be used below:

d. Which of the discretionary (optional) deductions and/or exclusion 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
- X 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)

- X 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)

- X 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)

- X 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) developments
- Operating costs plus debt service
- The "rental value" of the unit
- Other (list below)

f. Rent re-determinations:

1. Between income re-examinations, 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)

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.)

- The 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)

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

Exemptions: PHAs that do not administer Section 8 tenant -based assistance are not required to complete sub-component 4B. **Unless otherwise specified, all questions in this section apply only to the tenant -based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**



**(1) Payment Standards**

Describe the voucher repayment standards and policies .

a. What is the PHA'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)

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)

d. How often are repayment 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) Minimum Rent**

a. What amount best reflects the PHA'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)]

Exemptions from Component 5: High performing and small PHAs are not required to complete this section. Section 8 only PHAs must complete parts A, B, and C(2)

**A. PHA Management Structure**

Describe the PHA's management structure and organization.

(select one)

- 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**

List Federal programs administered by the PHA, number of families served at the beginning of the upcoming fiscal year, and expected turnover in each. (Use "NA" to indicate that the PHA does not operate any of the programs listed below.)

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	399	
Section 8 Vouchers	1079	
Section 8 Certificates	0	
Section 8 Mod Rehab	N/A	
Special Purpose Section 8 Certificates/Vouchers (list individually)	N/A	
Other Federal Programs (list		

individually)		

**C. Management and Maintenance Policies**

List the PHA's public housing management and maintenance policy documents, manuals and handbooks that contain the Agency's rules, standards, and policies that govern maintenance and management of public housing, including a description of any measures necessary for the prevention or eradication of pest infestation (which includes cockroach infestation) and the policies governing Section 8 management.

(1) Public Housing Maintenance and Management: (list below)

\* Maintenance Plan

(2) Section 8 Management: (list below)

\* Administrative Plan

**6. PHA Grievance Procedures**

[24 CFR Part 903.79(f)]

Exemptions from component 6: High performing PHAs are not required to complete component 6. Section 8 - Only PHAs are exempt from sub -component 6A.

**A. Public Housing**

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

If yes, list addition to federal requirements below:

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

- X PHA main administrative office
- PHA development management offices

X Other (list below):  
Each site office

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

1.  Yes X No: Has the PHA 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 24CFR 982?

If yes, list additions to federal requirements below:

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

PHA main administrative office

Other (list below)

## **7. Capital Improvement Needs**

[24CFR Part 903.79(g)]

Exemptions from Component 7: Section 8 only PHAs are not required to complete this component and may skip to Component 8.

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

Exemptions from sub-component 7A: PHAs that will not participate in the Capital Fund Program may skip to component 7B. All other PHAs must complete 7A as instructed.

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

Using parts I, II, and III of the Annual Statement for the Capital Fund Program (CFP), identify capital activities the PHA is proposing for the upcoming year to ensure long-term physical and social viability of its public housing developments. This statement can be completed by using the CFP Annual Statement tables provided in the table library at the end of the PHA Plan template **OR**, at the PHA's option, by completing and attaching a properly updated HUD-52837.

Select one:

The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan

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

## **Component 7 Capital Fund Program Annual Statement Parts I, II, and III**

### **Annual Statement**

#### **Capital Fund Program (CFP) Part I: Summary**

Capital Fund Grant Number SC16P056 -501-03FFY of Grant Approval: 06/2003

Original Annual Statement

Line No.	SummarybyDevelopmentAccount	TotalEstimated Cost
1	TotalNon -CGPFunds	
2	1406Operations	
3	1408ManagementImprovements	\$76,070
4	1410Administration	\$38,035
5	1411Audit	
6	1415LiquidatedDamages	
7	1430Feesand Costs	\$11,824
8	1440SiteAcquisition	
9	1450SiteImprovement	
10	1460DwellingStructures	\$203,436
11	1465.1DwellingEquipment -Nonexpendable	\$50,965
12	1470NondwellingStructures	
13	1475NondwellingEquipment	
14	1485Demolition	
15	1490ReplacementReserve	
16	1492MovingtoWorkDemonstration	
17	1495.1RelocationCosts	
18	1498ModUsedforDevelopment	
19	1502Contingency	
20	<b>AmountofAnnualGrant(Sumoflines2 -19)</b>	<b>\$380,350</b>
21	Amountofline20RelatedtoLBPActivities	
22	Amountofline20RelatedtoSection504Compliance	
23	Amountofline20RelatedtoSecurity	
24	Amountofline20RelatedtoEnergyConservation Measures	

ATTACHMENT A

**Annual Statement  
Capital Fund Program (CFP) Part II: Supporting Table**

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
SC56 -1	Domestic water cutoff valve -ea floor	1460	\$12,000
Joseph Floyd Manor	PM Mechanical Systems	1460	\$11,800
	PM Fire Alarm System	1460	\$12,100
	PM elevators	1460	\$10,800
	Replace Andover Controls@JFM	1460	\$38,036
	Replace condensate pumps at chiller	1460	\$4,700
	Replace appliances	1465	\$14,880
SC56-7 (Brighton Place)	Replace appliances	1465	\$15,625
	Roof single and ridge vent replacement	1460	\$38,000
SC56-12 Single Family Dwellings	Replace rotted wood	1460	\$24,000
	Test for lead-based paint	1460	\$10,500
	Replace appliances	1465	\$4,340
SC 56-13	Replace rotted wood	1460	\$24,000
	Test for Lead Based Paint	1460	\$5,500
	Replace appliances	1465	\$6,820
SC56-15 Single Family Dwellings	Replace rotted wood	1460	\$12,000
	Replace appliances	1465	\$9,300
PHA Wide	Computer hardware/software	1408	\$8,012
	PM Inspector	1408	\$19,173
	Modernization Coordinator	1408	\$25,187
	Staff Training	1408	\$6,669
	Vehicle	1408	\$14,887
	Lawn Equipment Maintenance	1408	\$2,142
	FY2003 Annual Plan Page	36	\$38,035
	Benefits	1410	\$9,063
	A&E Fees	1430.1	\$1,000
	Sundries	1430.19	\$1,881

OMB Approval No. 2577-0226 Expires: 03/31/2004

ATTACHMENT A

**Annual Statement  
Capital Fund Program (CFP) Part III: Implementation Schedule**

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)	All Funds Expended (Quarter Ending Date)
SC56-1 Joseph Floyd Manor Domestic water cutoff valve PM Mech. System PM Fire alarm system Replace appliances PM elevators Replace Andover Controls	9/30/05  9/30/05 9/30/05  9/30/05 9/30/05 9/30/05	9/30/07  9/30/07 9/30/07  9/30/07 9/30/07 9/30/07
Replace Condensate Pumps at Chiller	9/30/05	9/30/07
SC56-7 Brighton Place Appliances replacement Roof shingle replacement	9/30/05   9/30/05	9/30/07   9/30/07
SC56-12 Single Family Dwellings Test for Lead Based Paint Structural Rotted Wood Replacement Replace Appliances	9/30/05  9/30/05 9/30/05	9/30/07  9/30/07 9/30/07
SC56-15 Single Family Dwellings Test for lead-based paint	9/30/04	9/30/06
SC 56-13 Test for Lead Based	9/30/05	9/30/07



Paint		
Structural Wood Replacement	9/30/05	9/30/07
Replace Appliances SC 56-15	9/30/05	9/30/07
Structural Rotted Wood Replacement	9/30/05	9/30/07
Replace Appliances PHA Wide	9/30/05	9/30/07
Computers	9/30/05	9/30/07
PM Inspector	9/30/05	9/30/07
Mod Coordinator	9/30/05	9/30/07
Staff Training	9/30/05	9/30/07
Vehicle	9/30/05	9/30/07
Lawn Equipment		
Benefits		
A&E Fees		
Sundries		

**ATTACHMENT A**

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

Agencies are encouraged to include a 5 -Year Action Plan covering capital work items. This statement can be completed by using the 5 Year Action Plan table provided in the table library at the end of the PHA Plan template OR by completing and attaching a properly updated HUD -52834.

a. X Yes  No: Is the PHA 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 (state name

-or-

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

**Optional Table for 5 -Year Action Plan for Capital Fund (Component 7) (Attachment C)**

Complete one table for each development in which work is planned in the next 5 PHA fiscal years. Complete a table for any PHA -wide physical or management improvements planned in the next 5 PHA fiscal year. Copy this table as many times as necessary. Note: PHAs need not include information from Year One of the 5 -Year cycle, because this information is included in the Capital Fund Program Annual Statement.

Optional 5 - Year Action Plan Tables			
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development
SC056001	Joseph Floyd Manor		
Description of Needed Physical Improvements or Management Improvements			Planned Start Date (HA Fiscal Year)
PHA Wide –1408 Computer Hardware			2003
“ 1408 PM Inspector			2003
“1408 Mod Coordinator			2003
“1408 Security guards			2007
“1408 Staff Training			2003
“1408 Vehicle/lawn equipment			2003
“ 1410 Benefits			2003
SC0560011460 Replace and over controls at HVAC			2003
“1460 Appliance replacements			2003
“1460 PM Fire Alarm System			2003
“1460 PM Mechanical system			2003
“1460 PM Elevator			2003
“1460 Replace condensate pumps at chiller			2003
“1460 Replace HVAC equipment			2004
“1460 Install automatic door to lobby			2003
“1460 Pressure assisted water closets			2005
“1460 Fabric canopy from entrance to driveway			2006
“1460 Domestic water cutoff valve at floor @ JFM			2006
Total estimated cost over next 5 years			\$1,456,435

**Optional Table for 5 - Year Action Plan for Capital Fund (Component 7) (Attachment C)**

Complete one table for each development in which work is planned in the next 5 PHA fiscal years. Complete a table for any PHA -wide physical or management improvements planned in the next 5 PHA fiscal year. Copy this table as many times as necessary. Note: PHAs need not include information from Year One of the 5 -Year cycle, because this information is included in the Capital Fund Program Annual Statement.

Optional 5 - Year Action Plan Tables			
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development
SC056007	Brighton Place		
Description of Needed Physical Improvements or Management Improvements			Planned Start Date (HA Fiscal Year)
PHA Wide –1408 Computer Hardware			2003
“1408 PM Inspector			2003
“1408 Mod Coordinator			2003
“1408 Security guards			2007
“1408 Staff Training			2003
“1408 Vehicle/lawn equipment			2003

“1410Benefits	190,175	2003
SC0560071465Replaceappliances	152,625	2003
“1460Replace roofandridgevents	103,000	2003
“1460Resurfaceasphaltparkinglot	20,000	2004
<b>Totalestimatedcostovernext5years</b>	<b>\$892,963</b>	

**OptionalTablefor5 -YearActionPlanforCapital Fund(Component 7)( AttachmentC)**

Completeonetableforeachdevelopmentinwhichworkisplannedinthenext5PHAfiscalyears. CompleteatableforanyPHA -widephysicalormangementimprovementsplannedinthenext5PHA fiscalyear.Copythista bleasmanytimesasnecessary.Note:PHAsneednotincludetheinformationfrom YearOneofthe5 -Yearcycle,becausethisinformationisincludedintheCapitalFundProgramAnnual Statement.

<b>Optional5 -YearActionPlanTables</b>				
<b>Development Number</b>	<b>DevelopmentName (orindicatePHAwide)</b>	<b>Number Vacant Units</b>	<b>%Vacancies inDevelopment</b>	
SC056012	ScatteredSites			
<b>DescriptionofNeededPhysicalImprovementsorManagement Improvements</b>			<b>Estimated Cost</b>	
			<b>PlannedStartDate (HAFisca lYear)</b>	
PHAWide -1408ComputerHardware			\$40,060	2003
“1408PMInspector			95,865	2003
“1408ModCoordinator			100,748	2003
“1408Securityguards			72,000	2007
“1408StaffTraining			33,345	2003
“1408Vehicle/lawnequipment			85,145	2003
“1410Benefits			190,175	2003
SC0560121460Testforlead -basedpaint			10,500	2003
“1460Commercialstormdoorsandwindows			33,000	2006
“1460 Structuralrottedwoodreplacement			32,000	2003
“1465Replaceappliances			13,020	2003
<b>Totalestimatedcostovernext5years</b>			<b>\$723,638</b>	

## Optional Table for 5 - Year Action Plan for Capital Fund (Component 7) (Attachment C)

Complete one table for each development in which work is planned in the next 5 PHA fiscal years. Complete a table for any PHA -wide physical or management improvements planned in the next 5 PHA fiscal year. Copy this table as many times as necessary. Note: PHAs need not include information from Year One of the 5 - Year cycle, because this information is included in the Capital Fund Program Annual Statement.

Optional 5 - Year Action Plan Tables			
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development
SC056013	Scattered Sites		
Description of Needed Physical Improvements or Management Improvements			Estimated Cost
			Planned Start Date (HA Fiscal Year)
PHA Wide -1408 Computer Hardware			\$40,060
"1408 PM Inspector			95,865
"1408 Mod Coordinator			100,748
"1408 Security guard			72,000
"1408 Staff Training			33,345
"1408 Vehicle/lawn equipment			85,145
"1410 Benefits			1 90,175
SC056013 1460 Commercial storm doors and windows			65,838
"1460 Replace roof shingles			22,000
"1460 Lead -based paint test			5,500
"1460 Structural rotted wood replacement			32,000
"1465 Replace appliances			20,460
Total estimated cost over next 5 years			\$763,136

## Optional Table for 5 -Year Action Plan for Capital Fund (Component 7) (Attachment C)

Complete one table for each development in which work is planned in the next 5 PHA fiscal years. Complete a table for any PHA -wide physical or management improvements planned in the next 5 PHA fiscal year. Copy this table as many times as necessary. Note: PHAs need not include information from Year One of the 5 -Year cycle, because this information is included in the Capital Fund Program Annual Statement.

Optional 5 -Year Action Plan Tables				
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development	
SC056015	Scattered Sites	2	3%	
Description of Needed Physical Improvements or Management Improvements			Estimated Cost	Planned Start Date (HA Fiscal Year)
PHA Wide -1408 Computer Hardware			\$40,060	2003
"1408 PM Inspector			95,865	2003
"1408 Mod Coordinator			100,748	2003
"1408 Security guards			72,000	2007
"1408 Staff Training			33,345	2003
"1408 Vehicle/lawn equipment			85,145	2003
"1410 Benefits			190, 175	2003
SC056015 1460 Commercial storm doors and windows			107,837	2006
"1460 Replace roof shingles			30,800	2005
"1465 Replace appliances			26,082	2003
<b>Totales t imated cost over next 5 years</b>			<b>\$782,057</b>	




**B.HOPEVIandPublicHousingDevelopmentandReplacement Activities(Non -CapitalFund)**

Applicabilityofsub -component7B:AllPHAsadministeringp ublichousing.Identifyanyapproved HOPEVIand/orpublichousingdevelopmentorreplacementactivitiesnotdescribedintheCapitalFund ProgramAnnualStatement.

YesXNo:a)HasthePHAreceivedaHOPEVIrevitalizationgrant (ifno, skiptoquestionc;ifyes,provideresponsestoquestionbfor eachgrant,copyingandcompletingasmanytimesasnecessary) b)StatusofHOPEVIrevitalizationgrant(completeonesetof questionsforeachgrant)

- 1.Developmentname:
- 2.Development(project)number:
- 3.Statusofgrant:(selectthestatementthatbestdescribesthecurrent status)
  - RevitalizationPlanunderdevelopment
  - RevitalizationPlansubmitted,pendingapproval
  - RevitalizationPlanapproved
  - ActivitiespursuanttoanapprovedRevitalizationPlan underway

YesXNo:c)DoesthePHAplantoapplyforaHOPEVIRevitalizationgrant inthePlanyear? Ifyes,listdevelopmentname/sbelow:

YesXNo:d)WillthePHAbengaginginanymixed -financedevelopment activitiesforpublichousinginthePlanyear?

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:

**8. Demolition and Disposition**

[24CFR Part 903.79(h)]

Applicability of component 8: Section 8 only PHAs are not required to complete this section.

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)]

Exemptions from Component 9; Section 8 only PHAs are not required to complete this section.

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; PHAs 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:	Joseph Floyd Manor
1b. Development (project) number:	SC -056-01
2. Designation type:	Occupancy by only the elderly <input checked="" 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 checked="" type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission:	(30/06/04)
5. If approved, will this designation constitute a (select one)	<input type="checkbox"/> New Designation Plan <input checked="" type="checkbox"/> Revision of a previously approved Designation Plan?
6. Number of units affected:	
7. Coverage of action (select one)	

Part of the development  
 Total development

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

[24CFR Part 903.79(j)]

Exemptions from Component 10; Section 8 only PHAs are not required to complete this section.

**A. Assessment of Reasonable Revitalization Pursuant to Section 202 of the HUD FY1996 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 FY1996 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
<p>5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one)</p> <p><input type="checkbox"/> Units addressed in a pending or approved demolition application (date submitted or approved: _____)</p> <p><input type="checkbox"/> Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: _____)</p> <p><input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: _____)</p> <p><input type="checkbox"/> Requirements no longer applicable: vacancy rates are less than 10 percent</p> <p><input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units</p> <p><input type="checkbox"/> Other: (describe below)</p>

**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**

Exemptions from Component 11A: Section 8 only PHAs are not required to complete 11A.

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"/> HOPEI <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:

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. PHA -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:

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

[24CFR Part 903.79(1)]

Exemptions from Component 12: High performing and small PHAs are not required to complete this component. Section 8 - Only PHAs are not required to complete sub -component C.

### **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 support services (as contemplated by section 12(d)(7) of the Housing Act of 1987)?

If yes, what was the date that agreement was signed? 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 programsto 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
- X Section 8 admissions policies
- X 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
- X Preference/eligibility for section 8 home ownership option participation
- Other policies (list below)

b. Economic and Social self-sufficiency programs

Yes X No: Does the PHA coordinate, promote or provide any program 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/ PH 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 Participants (start of FY 2000 Estimate)	Actual Number of Participants (As of: DD/MM/YY)
Public Housing	N/A	N/A
Section 8	50	15 as of 01/02/2003

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)

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

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

**13. PHA Safety and Crime Prevention Measures**

[24CFR Part 903.79(m)]

Exemptions from Component 13: High performing and small PHAs not participating in PHDEP and Section 8 Only PHAs may skip to component 15. High performing and small PHAs that are participating in PHDEP and are submitting a PHDEP Plan with this PHA Plan may skip to sub component D. -

**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 area 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 level 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 anti crime/anti drug programs
- Other (describe below)

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

56-01 Joseph Floyd Manor  
56-07 Brighton Place



**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
- X Other (describe below)
  - A. Continue a "one strike" policy.
  - B. Continue to enforce strict lease policies and procedures.
  - C. Conduct criminal history record checks on all applicants and at re-certification all tenants age 18 and over.
  - D. Appropriate local Police authorities are aware of CCHRA public housing developments and provide pertinent police reports, criminal intelligence and other crime prevention data to the Deputy Sheriff on staff.
  - E. In association with local Community College assist tenant dependants with tuition costs for training.
  - F. Continue training for all Public Housing tenants which includes crime prevention techniques and drug awareness sessions.
  - G. Fund the services of off duty law enforcement personnel when needed for crime prevention and patrol during critical times.
  - H. Establish "Crime Watch" program at Projects 56 -01 and 56 -02 and encourage full participation of scattersite tenants in the "Crime Watch" programs in their respective neighborhoods.
  - I. Hardening of physical security at 56 -01 and 56 -07.
  - J. Installed security cameras at 56 -01

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

56-01 Joseph Floyd Manor  
56-07 Brighton Place

**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
  - X Police regularly meet with the PHA management and residents
  - X 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)
- 56- 01 Joseph Floyd Manor
- 56- 07 Brighton Place

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

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

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

**14. RESERVED FOR PET POLICY**

[24 CFR Part 903.79(n)]

Resolution 99 -22, passed by the Charleston County Housing and Redevelopment Authority Board of Commissioners on September 22, 19 99, and updated annually, permits the Admission and Continued Occupancy Policy to be amended to allow public housing residents to own a pet on CCHRA property.

**CHARLESTON COUNTY HOUSING AND REDEVELOPMENT AUTHORITY**

**ADMISSION AND CONTINUED OCCUPANCY POLICY**

**AMENDMENT TO PUBLIC HOUSING PET POLICY AMENDMENT**

**• EXCLUSIONS**

This policy does not apply to animals that are used to assist persons with disabilities. Assistive animals are allowed in all public housing facilities with no

restrictions other than impose donalltenantstomaintaintheirunitsandassociated facilitiesinadecent,safeandsanitarymannerandto refrainfromdisturbingtheir neighbors.

- **APPROVAL**

Residents must have the prior approval of the Housing Authority before moving a pet into the ir home. Residents must request approval on the Authorization for Pet Ownership Form that must be fully completed before the Housing Authority will approve the request. Once approval has been made, the resident/pet owner must complete and sign a Pet Agreement.

- **TYPES OF PETS AND NUMBER OF PETS ALLOWED**

The CCHRA will allow only domesticated dogs, cats, birds, and fish in aquariums in units. All dogs and cats must be spayed and neutered. No far animals, breeding animals, wild or feral animals or animals considered exotic by state of South Carolina will not be allowed. Some examples of exotic animals are, but are not limited to, monkeys, certain species of birds such as raptors, tarantulas, scorpions, poisonous snakes, or any animals not normally domesticated.

- **TYPES OF PETS AND NUMBER OF PETS ALLOWED (CONTINUED)**

Maximum of two (2) pets allowed per unit.

Any animals deemed to be potentially harmful or safety of others, including attack or fight trained dogs, will not be allowed.

- **INOCULATIONS**

In order to be registered, pets must be appropriately inoculated against rabies and other conditions prescribed by local ordinances. Resident must be able provide written verification of inoculation by Veterinarian, upon request by Landlord.

- **PET DEPOSIT AND FEE**

A \$125.00 deposit is required at the time of registering a pet and is **refundable**, providing there is not any damage done to the premises by the animal.

A \$75.00 is **anon -refundable pet fee** is also required at the time of registering the pet.

This combined pet deposit and fee in the amount of \$200.00 is due per pet, per cage or per each fish tank.

- **FINANCIAL OBLIGATION OF RESIDENTS**

Any resident who owns or keeps a pet in their dwelling unit will be required to pay for any damages caused by the pet. Also, any pet-related insect infestation in the pet owner's unit will be the financial responsibility of the pet owner and the CCHRA reserves the right to exterminate and charge the resident.

- **NUISANCE OR THREAT TO HEALTH AND SAFETY OF OTHERS**

The pet(s) and its living quarters must be maintained in a manner to prevent odors and any other unsanitary conditions in the pet owner's unit and surrounding areas.

Repeated substantiated complaints by neighbors or CCHRA personnel regarding pets disturbing the peace of neighbors through noise, odor, animal waste, or other nuisance will result in the owner having to remove the pet or vacate the premises entirely.

- **DESIGNATION OF PET AREAS**

Pets must be kept in the owner's apartment or on a leash at all times when outside (no outdoor cages may be constructed). Pets will be allowed only in designated areas on the grounds of the projects. Pet owners must clean up after their pets and are responsible for disposing of pet waste.

- **VISITING PETS**

Pets that meet the criteria outlined above may visit the projects/buildings where pets are allowed for up to two weeks without CCHRA approval. Tenants who have visiting pets must abide by the conditions of this policy regarding health, sanitation, nuisances, and peaceful enjoyment of others. If visiting pets violate this policy or cause the tenant to violate the Lease, the tenant will be required to remove the visiting pet.

## 15. Civil Rights Certifications

[24CFRPart903.79(o)]

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

## 16. Fiscal Audit

[24CFRPart903.79(p)]

1. X 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. X Yes  No: Was the most recent fiscal audit submitted to HUD?
3. Yes X No: Were there any findings as the result of that audit?
4.  Yes X 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. PHA Asset Management

[24CFRPart903.79(q)]

Exemptions from component 17: Section 8 Only PHAs are not required to complete this component. High performing and small PHAs are not required to complete this component.

1. X 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)
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?
  
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)  
Attached at Attachment (Filename)
  
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 there a 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):

Candidates are those serving as Officers of existing resident organizations.

##### 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)

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):

Members of resident organizations described in 3(a) above.

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

For each applicable Consolidated Plan, make the following statement (copy questions as many times as necessary).

1. Consolidated Plan jurisdiction: Charleston County

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)

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

**D. Other Information Required by HUD**

Use this section to provide any additional information requested by HUD.

## Attachments

Use this section to provide any additional attachments referenced in the Plans.



**PHAPlan  
TableLibrary**

# **CHARLESTON COUNTY HOUSING & REDEVELOPMENT AUTHORITY**

## **DECONCENTRATION POLICY**

### **SELECTION FROM THE WAITING LIST**

The Charleston County Housing Authority shall follow the statutory requirement that at least 40% of newly admitted families in any fiscal year be families whose annual income is at or below 30% of the area median income. To insure this requirement is met, we shall quarterly monitor the incomes of newly admitted families as well as off families on the waiting list. If it appears that the requirement to house extremely low -income families will not be met, we will skip higher income families on the waiting list to reach extremely low -income families.

If there are not enough extremely low -income families on the waiting list, we will conduct outreach on a non -discriminatory basis to attract extremely low -income families in order to reach the statutory requirement.

### **DECONCENTRATION POLICY**

It is the Charleston County Housing Authority's policy to provide for deconcentration of poverty and encourage income mixing by bringing higher income families into lower income developments and lower income families into higher income developments.

Toward this end, we will skip over families on the waiting list to reach other families with a lower or higher income. We will accomplish this in a uniform and non -discriminating manner.

The Charleston County Housing Authority will affirmatively market our housing to all eligible income groups. Lower income residents will not be steered toward lower income developments and higher income people will not be steered toward higher income developments.

Prior to the beginning of each fiscal year, we will analyze the income levels of families residing in each of our developments, the income levels of census tracts in which our developments are located, and the income level of the families on the waiting list. Based on this analysis, we will determine the level of marketing strategies and deconcentration incentives to implement.

MEMBERS OF THE SECTION 8 HOUSING

RESIDENT ADVISORY BOARD

2003

**NAME**

GLENDASIMMONS

DORETHAJACKSON

NATASHAFERRETTE

MARIALAW

PATRICIARIVERS

JULIAMARSHALL (COMMISSIONER)

Public Housing Resident Advisory Board Membership  
2003

1. Ms. Christina Blocker (JFM Tenants Assoc. V. President)
2. Mr. Gilbert Nelson (BP Residents Assoc. President)
3. Lela Evans
4. Ellen Grampus
5. LaSonia Gallashaw

## **ResidentMembershiponCCHRAGoverningBoard**

1. **Name:**Ms.JuliaMarshall  
**MethodofSelection:** Appointment  
**TermofAppointment:** ThroughJune6,2005
2. **Name:**Ms.AdaKelly  
**MethodofSelection:** Appointment  
**TermofAppointment:** ThroughJuly15,2005