

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

PHA Plans

5 Year Plan for Fiscal Years 2000 - 2004
Annual Plan for Fiscal Year 2004

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

HUD 50075
OMB Approval No: 2577-0226
Expires: 03/31/2002

**PHA Plan
Agency Identification**

PHA Name: Montgomery County Housing Authority

PHA Number: PA012

PHA Fiscal Year Beginning: 01/04

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 (Public Housing Office)
501 E. High Street, Pottstown, PA 19464

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 (Public Housing Office)
- 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 administrative office of the PHA
- PHA development management offices
- Other (list below)
Pottstown Public Housing Office

5-YEAR PLAN
PHA FISCAL YEARS 2000 - 2004

[24 CFR Part 903.5]

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.
- The PHA's mission is: (state mission here)

To stimulate and ensure safe, decent and affordable housing in Montgomery County, PA;
To recognize residents, community and government leadership as our partners;
To expand opportunities for assisted families to locate housing throughout Montgomery County;
To support participants and residents in MCHA programs to become self-sufficient and economically independent including expanded opportunities and support for assisted families to realize the benefits of homeownership or progressively independent housing choices;
To maintain mutual respect and dignity with all residents of Montgomery County;
To assure financial responsibility and integrity by all participants and residents; and
To achieve excellence through innovative program development and effective program management to the benefit of all residents of Montgomery County.

B. Goals

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these 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 ENCOURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS.** (Quantifiable measures would include targets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the spaces to the right of or below the stated objectives.

HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.

- PHA Goal: Expand the supply of assisted housing
Objectives:
- Apply for additional rental vouchers: depending on program need, staff capacity, and willingness of agencies to partners with us, ie. Welfare-to-Work, assistance to persons with disabilities, etc., approximately 50-100 vouchers

- Reduce public housing vacancies: adequate tracking, coordination

between managers and maintenance and good waiting list management helps MCHA obtain 20 day turnaround average

- Leverage private or other public funds to create additional housing opportunities: MCHA plans to investigate alternate funding through collaboration with other agencies and as a non-profit entity
- Acquire or build units or developments
- Other (list below)
Apply for incremental vouchers, which become available through NOFA

PHA Goal: Improve the quality of assisted housing

Objectives:

- Improve public housing management: (PHAS score) MCHA has been a high performer for past several years, hope to be able to obtain same designation with PHAS, staff reorganization will improve accountability
- Improve voucher management: (SEMAP score) MCHA has not received score yet, however, if improvement is needed it will be addressed
- Increase customer satisfaction: one of MCHA's top priorities, promote good resident involvement with planning, policies and procedures, MCHA hopes to receive 10 points through RASS
- Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections) if PHAS or SEMAP scores show a need for improvement, MCHA will concentrate on areas need
- Renovate or modernize public housing units: excellent scores (A) through PHMAP for past several years, preserve renovated units and systems
- Demolish or dispose of obsolete public housing: MCHA has experienced great success with Public Housing 5(h) Homeownership Program, currently have sold 17 obsolete public housing units through Homeownership and three units through disposition
- Provide replacement public housing:
- Provide replacement vouchers: equal to public housing units converted per QHWRA – if we find that conversion is most feasible or feasible option
- Other: (list below)

PHA Goal: Increase assisted housing choices

Objectives:

- Provide voucher mobility counseling: MCHA participates in HUD's Regional Opportunity Program and per Administrative Plan undertakes a myriad of activities for unlimited amount of families to increase housing choices
- Conduct outreach efforts to potential voucher landlords: proactively advertise, hold at least annually informative meetings

- Increase voucher payment standards: for exception rent areas which have been approved by HUD
- Implement voucher homeownership program: requests for Authority to administer demonstration program approved by HUD
- Implement public housing or other homeownership programs: currently experiencing great success with 5(h) Homeownership Program, sold 17 obsolete public housing units (scattered sites, PA-12-8) and 16 through county wide program
- Implement public housing site-based waiting lists: actively researching this option in the future, not this current program year
- Convert public housing to vouchers: actively researching this option in the future, not this current program year
- Other: (list below)

HUD Strategic Goal: Improve community quality of life and economic vitality

- PHA Goal: Provide an improved living environment
 - Objectives:
 - Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments: use of admission preferences as well as self-sufficiency programs to raise the income limits of current residents will enhance this goal
 - Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments: analysis will disclose whether this is required to affect deconcentration
 - Implement public housing security improvements: actively pursuing PHDEP grants for all developments including our primarily elderly/disabled developments, strong screening and tougher eviction policies will ensure housing opportunities are offered to deserving families, MCHA estimates that for every five applicants eligible for the waiting list one applicant will be denied for past negative behavior
 - Designate developments or buildings for particular resident groups (elderly, persons with disabilities) MCHA analysis indicates a great need for housing for the elderly and plans to pursue designation of some of it's developments
 - Other: (list below)

HUD Strategic Goal: Promote self-sufficiency and asset development of families and individuals

- PHA Goal: Promote self-sufficiency and asset development of assisted households

Objectives:

- Increase the number and percentage of employed persons in assisted families: one of MCHA's top priorities, also good way to address deconcentration efforts, three resident councils have been awarded TOP Grants and MCHA administers successful Family Self Sufficiency Programs, estimate 50% of households will be employed within five years
- Provide or attract supportive services to improve assistance recipients' employability: through Family Self Sufficiency Programs, Housing Choice Voucher Program (HCVP) and Public Housing, implement new partnerships through Public Housing Community Service, 90% of families will be in compliance
- Provide or attract supportive services to increase independence for the elderly or families with disabilities: MCHA has recently been presented with a local and State award for actively promoting elderly workers through the National Caucus for the Black Aged (NCBA). MCHA currently has 28 elderly workers on the program and will continue to support these efforts.
- Other: (list below)
MCHA actively promotes Section 3 requirements through contracting preferences and advertisement

HUD Strategic Goal: Ensure Equal Opportunity in Housing for all Americans

- PHA Goal: Ensure equal opportunity and affirmatively further fair housing
Objectives:
 - Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability: MCHA has always and continues to monitor that access to housing is fair to all applicants, MCHA advertises at various service providers, in public newspapers, churches, at each development and main administrative office
 - Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability: analysis will disclose whether measures are required
 - Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required: MCHA has always and continues to offer accessible units to families who will benefit the most. Procedures are included in lease, ACO Policy and Management Plan
 - Other: (list below)

Other PHA Goals and Objectives: (list below)

Actively submit applications for supportive grants to improve current services offered to our Public Housing residents and Housing Choice Voucher Program (HCVP) tenants and to implement new and additional services.

Annual PHA Plan
PHA Fiscal Year 2004

[24 CFR Part 903.7]

i. Annual Plan Type:

Select which type of Annual Plan the PHA will submit.

Standard Plan

Streamlined Plan:

- High Performing PHA**
 Small Agency (<250 Public Housing Units)
 Administering Housing Choice Voucher Program (HCVP) Only

Troubled Agency Plan

ii. Executive Summary of the Annual PHA Plan

[24 CFR Part 903.7 9 (r)]

Provide a brief overview of the information in the Annual Plan, including highlights of major initiatives and discretionary policies the PHA has included in the Annual Plan.

The Montgomery County Housing Authority (MCHA) has developed its Agency Plan in cooperation with residents, management, maintenance, local government and other interested parties. Prioritization of Capital Fund items was based on need, while attempting to distribute funds as evenly as possible. This was a predominate concern with many residents and maintenance personnel. The MCHA's statutory requirements concerning lead based paint testing and 504 compliance have been completed and the MCHA is in compliance.

The following are points of concern with respect to our management of Public Housing developments: turnaround time, vacancy rate, income loss due to vacancies, extensive crime rate and vandalism, drug and alcohol abuse and resident initiatives. While these remain areas of concern, we have been able to continue to improve conditions to the point that we have received a high performer rating for the past eight years. Our administration restructuring has provided a greater degree of accountability through a more direct chain of command. By bringing Maintenance, Management and Modernization under the supervision of one Deputy Executive Director has allowed for better coordination between the three departments.

In late July of 2003 a RIM Review was conducted by the Regional Office of HUD. The results will be forwarded and all recommendations made. MCHA will implement changes to policies, procedures, and forms mandated by HUD regulations.

The most important management improvements we have made in order to preserve the physical improvements are those related to procedures and staff development as well as resident initiatives. Through semi-annual inspections we have been able to identify and correct minor maintenance items, which, if unreported, would have become major problems or even emergency situations.

Management staff has been working with resident representatives to develop a set of housekeeping standards. This will allow managers to take action against residents who do not care for their apartments or yards properly.

The recently enacted Quality Housing Work Responsibility Act (QHWRA) has brought many changes to the Public Housing Department. The MCHA has implemented family choice of rent, income exclusions for Welfare to Work incentives, community service requirements, income targeting requirements, and has developed a policy for deconcentration of families within certain income levels.

The quality of both maintenance and management are dependent not only on the employees having a clear set of guidelines describing their jobs, but also on their having the skills to perform the jobs; staff development and training are critical to preserving the work and implementing new policies and procedures. Maintenance, Management and Modernization staff will receive skills training and supervisors will be trained in planning and prioritizing jobs, deploying staff and monitoring production.

As the Housing Choice Voucher Program (HCVP) staff moves forward over the next year we face many challenges. We have successfully implemented most of the QHWRA mandates including the merged Certificate/Voucher program, the income targeting requirements, minimum rents and minimum rent exceptions, Family Self-Sufficiency Program size, repeal of the Federal Preferences, application admission review process, repeal of the 90 day hold on leasing tenant based assistance, termination of assisted tenancy for illegal use of controlled substances and alcohol abuse when it is determined by the MCHA to interfere with the health, safety or right to peaceful enjoyment of the premises and other residents and the repeal of the "take-one-take all" pre-existing provisions. We have recently re-organized our HCVP Department; our new management plan and organizational structure, which is team oriented, is working very well.

Our plans for our Housing Choice Voucher Program (HCVP) for the upcoming year include: SEMAP reporting, continued implementation of Welfare-to-Work Voucher Program for the 50 vouchers awarded to us under this program, ongoing training and quality control review relative to changes effected and implemented as noted above, continued implementation of our Housing Choice Voucher Program (HCVP) Homeownership Option, submission of application(s) for additional Housing Choice Voucher Program (HCVP) vouchers, (dependent on NOFAs for this funding) continued intense efforts to place our new subsidies under contract with owners, and enrollment of additional participants in our Family Self-Sufficiency Programs. We are also looking into the feasibility of becoming a HUD Certified Housing Counseling Agency and will be adding additional staff for our HCVP administration. In addition, we hope as a result of a recent HUD RIM review, to implement necessary procedural changes as required by the department. We have received a County Affordable Housing Trust Fund grant in support of our HCVP Homeownership Option participants and expect to continue to sell at least 10 units a year under this program. During this past year, we implemented a local preference for disabled families/persons and the homeless and are working very closely with our county social service providers in a joint effort to provide affordable housing and services for families with disabled family members.

MCHA RESOURCES CENTER

The building formerly known as the MCHA Resources Center is now known as Cherry Court. This facility is comprised of approximately 30,000 square feet and serves as the Main Office and Headquarters of MCHA. We also plan to provide facilities for other public non-profit agencies, which will provide housing and economic development services and assistance.

Cherry Court is located one block from the County Courthouse and is convenient to local bus and commuter rail line transportation. The site is two blocks from the Norristown Transportation Center (bus and light rail) and three blocks from Route 202. The location is also close to other major highways accessing the Schuylkill Expressway (I-76) and the Pennsylvania Turnpike and traversing Chester, Delaware, Montgomery and Bucks Counties from south to north.

MCHA has undertaken this project in order to provide expanded, modernized and a more efficient office space for its headquarters and administrative operations, which were previously housed in approximately 7,200 square feet of leased space at 1875 New Hope Street, Norristown, PA.

The premise of affordability relied heavily on our ability to rent out 10,000 square feet of office space on the second floor of this facility. MCHA is presently renting approximately 3,000 square feet of office space to the Redevelopment Authority of the County of Montgomery. We are soliciting requests for proposals from local Real Estate Agents in an effort to rent the remaining 7,000 square feet available on the second floor.

On September 25, 2002, the MCHA moved into its new Cherry Court location and has since been increasing the level of efficiency as well as appearance. Improvements have been accomplished primarily by the MCHA Maintenance Department. Our capable staff has improved lighting; provided secure storage and record keeping areas; enhanced curb appeal by improving landscaping, repairing the clock and providing accent lighting to the clock and cupola; we instituted security measures by way of closed circuit TV and improved exterior lighting; we've improved air quality and circulation; and upgraded conference rooms for various departments, making those areas more efficient and appealing.

MCHA will continue to make improvements based upon recommendations made by our Executive Director, Board of Directors, Public Relations Director and tenants. We will utilize Capital Fund, General Fund and Drug Elimination Fund monies and will strive to make this facility the most eye appealing and functional property in that locale.

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

Provide a table of contents for the Annual Plan, including attachments, and a list of supporting documents available for public inspection.

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*Streamlined Submission Due To High Performing Status

Attachments

Indicate which attachments are provided by selecting all that apply. Provide the attachment's name (A, B, etc.) in the space to the left of the name of the attachment. Note: If the attachment is provided as a **SEPARATE** file submission from the PHA Plans file, provide the file name in parentheses in the space to the right of the title.

Required Attachments:

- Admissions Policy for Deconcentration (not applicable per Notice PIH 99-51 (HA))
- (pa012a01)-Attachment A-FY 2004 Capital Fund Program Annual Statement
- (pa012b01)-Attachment B-Resident Advisory Board
- (pa012c01)-Attachment C-Resident Board of Director
- (pa012d01)-Attachment D-HCVP Homeownership Capacity Statement
- (pa012e01)-Attachment E-Progress Report
- (pa012f01)-Attachment F-Final Performance & Eval. Report, Period Ending 6/30/03 for CFP 2000 (Parts I, II, & III)
- (pa012g01)-Attachment G-Final Performance & Eval. Report, Period Ending 6/30/03 for CFP 2001 (Parts I, II, & III)
- (pa012h01)-Attachment H-Performance & Eval. Report, Period Ending 6/30/03 for CFP 2002 (Parts I, II, & III)

- (pa012i01)-Attachment I-FY 2004 Capital Fund Program 5 Year Action Plan
- (pa012j01)-Attachment J-Project Based Voucher Program
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

Optional Attachments:

- PHA Management Organizational Chart
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- (pa012k01)-Attachment K-Replacement Housing Factor Plan – Submitted to HUD 5/28/03

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.

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
X	<i>PHA Certifications of Compliance with the PHA Plans and Related Regulations and Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans.</i>	Standard 5 Year and Annual Plans; streamlined 5 Year Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan.	5 Year Plans
X	Fair Housing Documentation Supporting Fair Housing Certifications: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans
X	Housing Needs Statement of the Consolidated Plan for the jurisdiction(s) in which the PHA is located and any additional backup data to support statement of housing needs for families on the PHA’s public housing and Section 8 tenant-based waiting lists.	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/ACOP), which includes the Tenant Selection and Assignment Plan [TSAP] and the Site-Based Waiting List Procedure.	Annual Plan: Eligibility, Selection, and Admissions Policies
N/A	Any policy governing occupancy of Police Officers and Over-Income Tenants in Public Housing. <input type="checkbox"/> Check here if included in the public housing A&O Policy.	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Deconcentration (PH only) and Income Targeting Documentation	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the method for setting public housing flat rents. <input type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
	Schedule of flat rents offered at each public housing development.	Annual Plan: Rent

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
X	<input type="checkbox"/> Check here if included in the public housing A & O Policy.	Determination
X	Section 8 rent determination (payment standard) policies (if included in plan, not necessary as a supporting document) and written analysis of Section 8 payment standard policies. <input checked="" type="checkbox"/> 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	Results of latest Public Housing Assessment System (PHAS) Assessment (or other applicable assessment).	Annual Plan: Management and Operations
N/A	Follow-up Plan to Results of the PHAS Resident Satisfaction Survey (if necessary)	Annual Plan: Operations and Maintenance and Community Service & Self-Sufficiency
X	Results of latest Section 8 Management Assessment System (SEMAP)	Annual Plan: Management and Operations
X	Any policies governing any Section 8 special housing types <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Operations and Maintenance
N/A	Consortium agreement(s).	Annual Plan: Agency Identification and Operations/ Management
X	Public housing grievance procedures <input type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures. <input checked="" type="checkbox"/> Check here if included in Section 8 Administrative Plan.	Annual Plan: Grievance Procedures
X	The Capital Fund/Comprehensive Grant Program Annual Statement /Performance and Evaluation Report for any active grant year.	Annual Plan: Capital Needs
N/A	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grants.	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
X	Self-evaluation, Needs Assessment and Transition Plan required by regulations implementing Section 504 of the Rehabilitation Act and the Americans with Disabilities Act. See PIH Notice 99-52 (HA).	Annual Plan: Capital Needs
X	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, Section 22 of the US Housing Act of 1937, or Section 33 of the US Housing Act of 1937.	Annual Plan: Conversion of Public Housing
X	Documentation for required Initial Assessment and any additional information required by HUD for Voluntary Conversion.	Annual Plan: Voluntary Conversion of Public Housing
X	Approved or submitted public housing homeownership programs/plans.	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program	Annual Plan:

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
X	(Attachment to the Section 8 Administrative Plan)	Homeownership
X	Public Housing Community Service Policy/Programs <input checked="" type="checkbox"/> Check here if included in Public Housing A & O Policy	Annual Plan: Community Service & Self-Sufficiency
X	Cooperative agreement between the PHA and the TANF agency and between the PHA and local employment and training service agencies.	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	Section 3 documentation required by 24 CFR Part 135, Subpart E for public housing.	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports for public housing.	Annual Plan: Community Service & Self-Sufficiency
X	Policy on Ownership of Pets in Public Housing Family Developments (as required by regulation at 24 CFR Part 960, Subpart G). <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Pet Policy
X	The results of the most recent fiscal year audit of the PHA conducted under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings.	Annual Plan: Annual Audit
N/A	Consortium agreement(s), if a consortium administers PHA programs.	Joint PHA Plan for Consortia
N/A	Consortia Joint PHA Plans ONLY: Certification that consortium agreement is in compliance with 24 CFR Part 943 pursuant to an opinion of counsel on file and available for inspection	Joint PHA Plan for Consortia
	Other supporting documents (optional). List individually.	(Specify as needed)
X	Public Housing Drug Elimination Program Semi Annual Performance Reports	Annual Plan: Safety and Crime Prevention
X	Procurement Policy	Annual Plan: Management and Operations
X	Personnel Policy	Annual Plan: Management and Operations
X	Public Housing Residential Dwelling Lease	Annual Plan: Management and Operations
X	List of Public Housing Developments and Income Limits	Annual Plan: Management and Operations
X	MCHA Application Materials for Public Housing & HCV Programs	Annual Plan: Management and Operations
X	MCHA Organizational Chart and Contacts	Annual Plan: Management and Operations
X	Fair Market Rents, Maximum Rents and Utility Allowances	Annual Plan: Rent Determination
X	Resident Involvement Policy	Annual Plan: Resident and Public Comment
X	Advisory Board Minutes, Agency Plan Advertisement and Public Meeting Schedules	Annual Plan: Resident and Public Comment

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (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.

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	7,871	4	4	N/A	N/A	2	N/A
Income >30% but <=50% of AMI	7,689	4	4	N/A	N/A	2	N/A
Income >50% but <80% of AMI	14,935	3	3	N/A	N/A	2	N/A
Elderly	11,691	5	4	N/A	N/A	2	N/A
Families with Disabilities	2,233	4	4	N/A	3	2	N/A
Race/Ethnicity							
White/Non Hisp.	26,018	4	3	N/A	N/A	2	N/A
Black/Non Hisp.	3,011	3	3	N/A	N/A	2	N/A
Hispanic	582	4	3	N/A	N/A	2	N/A

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: Montgomery County 2000
- U.S. Census data: the Comprehensive Housing Affordability Strategy (“CHAS”) dataset
- American Housing Survey data
Indicate year: 1995
- Other housing market study
Indicate year
- Other sources

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	639	4	3	N/A	N/A	2	N/A
Income >30% but <=50% of AMI	577	4	3	N/A	N/A	2	N/A
Income >50% but <80% of AMI	873	3	3	N/A	N/A	2	N/A
Elderly	951	4	3	N/A	N/A	2	N/A
Families with Disabilities	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Race/Ethnicity							
White/Non Hisp.	1775	4	3	N/A	N/A	2	N/A
Black/Non Hisp.	251	3	3	N/A	N/A	2	N/A
Hispanic	20	3	3	N/A	N/A	2	N/A

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: Lower Merion 2000
- 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)

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	553	4	3	N/A	N/A	2	N/A
Income >30% but <=50% of AMI	554	4	3	N/A	N/A	2	N/A
Income >50% but <80% of AMI	882	4	3	N/A	N/A	2	N/A
Elderly	997	5	3	N/A	N/A	2	N/A
Families with Disabilities	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Race/Ethnicity							
White/Non Hisp.	1702	4	3	N/A	N/A	2	N/A
Black/Non Hisp.	199	3	3	N/A	N/A	2	N/A
Hispanic	34	4	3	N/A	N/A	2	N/A

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: Abington 1995
- 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)

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	1,099	4	3	N/A	N/A	2	N/A
Income >30% but <=50% of AMI	874	4	3	N/A	N/A	2	N/A
Income >50% but <80% of AMI	1,383	4	3	N/A	N/A	2	N/A
Elderly	925	4	3	N/A	N/A	2	N/A
Families with Disabilities	74*	N/A	N/A	N/A	N/A	N/A	N/A
Race/Ethnicity							
White/Non Hisp.	2,066	4	3	N/A	N/A	2	N/A
Black/Non Hisp.	1,050	4	3	N/A	N/A	2	N/A
Hispanic	184	4	3	N/A	N/A	2	N/A

*Source could only provide for families with severe mental illness.

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: Norristown Borough 2000
- 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 Housing Choice Voucher Program (HCVP) 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.** PHAs 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 type="checkbox"/>	Housing Choice Voucher Program (HCVP) tenant-based assistance		
<input checked="" type="checkbox"/>	Public Housing		
<input type="checkbox"/>	Combined Housing Choice Voucher Program (HCVP) and Public Housing		
<input type="checkbox"/>	Public Housing Site-Based or sub-jurisdictional waiting list (optional)		
If used, identify which development/subjurisdiction:			
	# of families as of 6/30/03	% of total families	Annual Turnover
Waiting list total	509	--	88 units
Very low income (>30% but <=50% AMI)	147	29%	
Low income (>50% but <80% AMI)	12	27%	
Extremely low income <=30% AMI	350	69%	
Families with children	274	54%	
Elderly families	122	24%	
Families with Disabilities	104	20%	
White	216	42%	

Housing Needs of Families on the Waiting List			
White/Hispanic	25	05%	
Black	259	51%	
Black/Hispanic	2	00%	
American Indian	2	00%	
Asian	1	00%	
Other	4	01%	

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Housing Needs of Families on the Waiting List			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	37	07%	20 units
2 BR	126	25%	34 units
3 BR	125	25%	5 units
4 BR	16	03%	3 unit
5 BR	3	01%	0 unit
Efficiencies	202	40%	26 units
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input checked="" type="checkbox"/>	Housing Choice Voucher Program (HCVP) tenant-based assistance		
<input type="checkbox"/>	Public Housing		
<input type="checkbox"/>	Combined Housing Choice Voucher Program (HCVP) and Public Housing		
<input type="checkbox"/>	Public Housing Site-Based or sub-jurisdictional waiting list (optional)		
If used, identify which development/subjurisdiction:			
	# of families as of 6/30/03	% of total families 6/30/03	Annual Turnover

Housing Needs of Families on the Waiting List			
Waiting list total	679		324
Extremely low income <=30% AMI	427	63%	
Very low income (>30% but <=50% AMI)	300	44%	
Low income (>50% but <80% AMI)	3	00%	
Families with children	526	77%	
Elderly families	36	05%	

Housing Needs of Families on the Waiting List			
Families with Disabilities	95	14%	
White	185	27%	
White/Hispanic	24	04%	
Black	503	74%	
Black/Hispanic	0	00%	
American Indian	2	00%	
Asian	6	01%	
Hispanic American Indian	0	00%	
Other	0	00%	
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)? 6 months			
Does the PHA expect to reopen the list in the PHA Plan year? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input checked="" type="checkbox"/> No <input type="checkbox"/> 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.

Need: Shortage of affordable housing for all eligible populations

(1) Strategies

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

Select all that apply

- Employ effective maintenance and management policies to minimize the number of public housing units off-line
- Reduce turnover time for vacated public housing units
- Reduce time to renovate public housing units
- Seek replacement of public housing units lost to the inventory through mixed finance development
- Seek replacement of public housing units lost to the inventory through Housing Choice Voucher Program (HCVP) replacement housing resources
- Maintain or increase Housing Choice Voucher Program (HCVP) lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction
- Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required

- Maintain or increase Housing Choice Voucher Program (HCVP) lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- Maintain or increase Housing Choice Voucher Program (HCVP) lease-up rates by effectively screening Housing Choice Voucher Program (HCVP) applicants to increase owner acceptance of program
- Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- Other (list below)
 - Apply for Housing Search Assistance Funding
 - Apply annually for funding for Elderly/Disabled Service Coord. & Homeownership Program Admin.

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

Select all that apply

- It is the intent of the Montgomery County Housing Authority to continue to vigorously issue vouchers to HCVP families moving from one assisted unit to another and new program participants coming off the waiting list.
- Apply for additional Housing Choice Voucher Program (HCVP) units should they become available and staffing is available
- Leverage affordable housing resources in the community through the creation of mixed - finance housing
- Pursue housing resources other than public housing or Housing Choice Voucher Program (HCVP) tenant-based assistance

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 Housing Choice Voucher Program (HCVP) assistance
- Employ admissions preferences aimed at families with economic hardships
- Adopt rent policies to support and encourage work (PH only)
- 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 (PH only)
- Adopt rent policies to support and encourage work (PH only)

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 vouchers targeted to the elderly, should they become available and staffing is available
- Other: (list below)
Develop and administer an elderly service program

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 vouchers targeted to families with disabilities, should they become available (if community and social service agencies indicate desire to partner with MCHA in this initiative and if staffing is available)
- Affirmatively market to local non-profit agencies that assist families with disabilities (Public Housing only)
- Other: (list below)
Develop and administer a disabled service program

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 Housing Choice Voucher Program (HCVP) tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units
- Market the Housing Choice Voucher Program (HCVP) program to owners outside of areas of poverty /minority concentrations
- Other: conduct Housing Choice Voucher Program (HCVP) landlord informational briefings

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

[24 CFR Part 903.7 9 (b)]

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Housing Choice Voucher Program (HCVP) assistance programs administered by the PHA during the Plan year. Note: the table assumes that Federal public housing or tenant based Housing Choice Voucher Program (HCVP) 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 supportive services, Housing Choice Voucher Program (HCVP) tenant-based assistance, Housing Choice Voucher Program (HCVP) supportive services or other.

FY2004

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2003 grants)		
a) Public Housing Operating Fund	1,668,541	
b) Public Housing Capital Fund	1,208,140	
c) HOPE VI Demolition		
d) Annual Contributions for Housing Choice Voucher Program (HCVP) Tenant-Based Assistance	19,531,292	
e) Public Housing Drug Elimination Program (including any Technical Assistance funds)		

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
f) Resident Opportunity and Self-Sufficiency Grants		

a) Community Development Block Grant		
b) HOME		
Other Federal Grants (list below)		
2. Prior Year Federal Grants (unobligated funds only) (list below)	189,699	Housing Rep Factor
DEV PA26-P012-014	250,841	PH Development
PA26-P012-50100	1,572,888	PH Capital Fund
CGP PA26-P012-708		
3. Public Housing Dwelling Rental Income	1,666,155	PH Operations
4. Other income (list below)		
4. Non-federal sources (list below)		
Total resources	26,087,556	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.7 9 (c)]

A. Public Housing

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

(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: (approx.4 months)
- Other: (describe)

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

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

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

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

e. Yes 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)

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

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

- PHA main administrative office
- PHA development site management office
- Other (list below)
Centralized Waiting List Office

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

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

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

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

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

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

(3) Assignment

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

- One (one refusal for good cause)
- Two
- Three or More (2-3 Offer Plan)

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

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

(4) Admissions Preferences

a. Income targeting:

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

b. Transfer policies:

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

- 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)

MCHA attempts to complete one transfer for every four admissions per development for the following reasons: overhoused, underhoused and non emergency medical justification

c. Preferences

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

?? 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)

- Working families and those unable to work because of age or disability
- Veterans and veterans' spouse
- Residents who live and/or work in the jurisdiction or who can provide evidence they were hired to work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes

?? If the PHA will employ admissions 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 point system), place the same number next to each. That means you can use “1” more than once, “2” more than once, etc.

*MCHA aggregates preferences so that a family with greater points has higher priority

2 Date and Time

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

Other preferences (select all that apply)

- 1 Working families and those unable to work because of age or disability
1 Veterans and veterans’ spouse
1 Residents who live and/or work in the jurisdiction or who can provide evidence they were hired to work in the jurisdiction
 Those enrolled currently in educational, training, or upward mobility programs
 Households that contribute to meeting income goals (broad range of incomes)
 Households that contribute to meeting income requirements (targeting)
 Those previously enrolled in educational, training, or upward mobility programs
 Victims of reprisals or hate crimes

4. Relationship of preferences to income targeting requirements:

- The PHA applies preferences within income tiers
 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)

- The PHA-resident lease
 The PHA’s Admissions and (Continued) Occupancy policy
 PHA briefing seminars or written materials

- Other source (list)
 - MCHA Resident Handbook
 - One Strike and You're Out Policy
 - Housekeeping Standards Policy

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

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

(6) Deconcentration and Income Mixing

a. Yes No: Does the PHA have any general occupancy (family) public housing developments covered by the deconcentration rule? If no, this section is complete. If yes, continue to the next question.

b. Yes No: Do any of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments? If no, this section is complete.

If yes, list these developments as follows:

Deconcentration Policy for Covered Developments Below the EIR			
Development Name:	Number of Units	Explanation (if any) [see step 4 at §903.2(c)(1)(iv)]	Deconcentration policy (if no explanation) [see step 5 at §903.2(c)(1)(v)]
Bright Hope Community*	169	N/A	903.2 (1) (v) (C) (D) (E)

* Contiguous sites PA012-002 and PA012-003

B. Housing Choice Voucher Program (HCVP)

Exemptions: PHAs that do not administer Housing Choice Voucher Program (HCVP) are not required to complete sub-component 3B.

Unless otherwise specified, all questions in this section apply only to the tenant-based Housing Choice Voucher Program (HCVP) 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)
Violent criminal activity to the extent required by Housing Choice Voucher Program (HCVP) regulations and law
- 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 (if written documentation is in tenant file)
 - Other (describe below)
See Chapter 8 of Housing Choice Voucher Program (HCVP) Administrative Plan

(2) Waiting List Organization

- a. With which of the following program waiting lists is the Housing Choice Voucher Program (HCVP) 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 Housing Choice Voucher Program (HCVP) tenant-based assistance? (select all that apply)

- PHA main administrative office
- Other (list below)

HCVP application packets are available at all Public Housing Developments, local social service agencies, and MCHA main office

(3) Search Time

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

If yes, state circumstances below:

medical emergencies, persons with disabilities, death in family and families searching for 3+ bedroom sized units

(4) Admissions Preferences

a. Income targeting

Yes No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the Housing Choice Voucher Program (HCVP) program to families at or below 30% of median area income?

b. Preferences

1. Yes No: Has the PHA established preferences for admission to Housing Choice Voucher Program (HCVP) tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent **(5) Special purpose Housing Choice Voucher Program (HCVP) 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 and formerly homeless living in transitional housing
- High rent burden (rent is > 50 percent of income)

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in your jurisdiction or who can provide evidence they were hired to work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)
 - Families over or under housed in MCHA Public Housing or Project Based & Mod Rehab units
 - Housing Choice Voucher Program (HCVP) Project Based & Mod Rehab families who must or request to move
 - Families that participate in a HUD or local law enforcement agency Witness Protection Program
 - Families in HUD's Welfare to Work Program per NOFA published 3/30/99
- Disabled
 - Note new preferences for disabled, homeless, and formerly homeless living in transitional housing up to an aggregate of 130 subsidy.

2. If the PHA will employ admissions 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 point system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

* MCHA aggregates preferences so that a family with greater points has higher priority

1 Date and Time

Former Federal preferences

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- 1 Residents who live and/or work in your jurisdiction or can provide evidence they were hired to work in the jurisdiction

- Those enrolled currently in educational, training, or upward mobility programs
 - Households that contribute to meeting income goals (broad range of incomes)
 - Households that contribute to meeting income requirements (targeting)
 - Those previously enrolled in educational, training, or upward mobility programs
 - Victims of reprisals or hate crimes
 - Other preference(s) (list below)
- 1 Families over or underhoused in MCHA Public Housing or Project Based & Mod Rehab Units
 - 1 Housing Choice Voucher Program (HCVP) Project Based & Mod Rehab families who must or request to move
 - 1 Families that participate in a HUD or local law enforcement agency Witness Protection Program
 - 1 Families in HUD's Welfare to Work Program per NOFA published 3/30/99
 - 1 Disabled

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 Housing Choice Voucher Program (HCVP) Assistance Programs

a. In which documents or other reference materials are the policies governing eligibility, selection, and admissions to any special-purpose Housing Choice Voucher Program (HCVP) program administered by the PHA contained? (select all that apply)

- The Housing Choice Voucher Program (HCVP) Administrative Plan
- Briefing sessions and written materials
- Other (list below)

b. How does the PHA announce the availability of any special-purpose Housing Choice Voucher Program (HCVP) programs to the public?

- Through published notices

- Other (list below)
Notification of waiting list families, i.e. welfare to work families eligible for welfare to work vouchers

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

Exemptions: PHAs 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---

- 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)

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

2. Yes 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 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 exclusions policies does the PHA plan to employ (select all that apply)

- For the earned income of a previously unemployed household member
- For increases in earned income
- Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

- Fixed percentage (other than general rent-setting policy)
- If yes, state percentage/s and circumstances below:

- For household heads
- For other family members
- For transportation expenses
- For the non-reimbursed medical expenses of non-disabled or non-elderly families
- Other (describe below)

e. Ceiling rents

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

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

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

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

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

- Market comparability study
- Fair market rents (FMR)
- 95th 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 reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply)

- Never
- At family option
- Any time the family experiences an income increase
- Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold)_____
- Other (list below)
Any time a family receives an income decrease

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 Housing Choice Voucher Program (HCVP) 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. Housing Choice Voucher Program (HCVP) Tenant-Based Assistance

Exemptions: PHAs that do not administer Housing Choice Voucher Program (HCVP) 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 Housing Choice Voucher Program (HCVP) assistance program (vouchers, and until completely merged into the voucher program, certificates).**

(1) Payment Standards

Describe the voucher payment 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
- Above 100% but at or below 110% of FMR for entire jurisdiction
- Above 110% of FMR (if HUD approved; describe circumstances below)
- Other:

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 (to achieve deconcentration)
- Other (list below)

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

- Annually
- Other (list below)

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

- Success rates of assisted families
- Other (list below)
Success rates in finding units in higher rent market section of the County

(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)

Families with zero income

5. Operations and Management

[24 CFR Part 903.7 9 (e)]

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

****THIS IS A STREAMLINED SUBMISSION DUE TO HIGH PERFORMING STATUS****

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		
Housing Choice Voucher Program (HCVP) Vouchers		
Housing Choice Voucher Program (HCVP) Certificates		
Housing Choice Voucher Program (HCVP) Mod Rehab		
Special Purpose Housing Choice Voucher Program (HCVP) Certificates/Vouchers (list individually)		
Public Housing Drug Elimination Program (PHDEP)		
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 Housing Choice Voucher Program (HCVP) management.

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

(2) Housing Choice Voucher Program (HCVP) Management: (list below)

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

Exemptions from component 6: High performing PHAs are not required to complete component 6. Housing Choice Voucher Program (HCVP)-Only PHAs are exempt from sub-component 6A.

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A. Public Housing

1. Yes 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 additions to federal requirements below:

2. Which PHA office should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)
- PHA main administrative office
 - PHA development management offices
 - Other (list below)

B. Housing Choice Voucher Program (HCVP) Tenant-Based Assistance

1. Yes No: Has the PHA established informal review procedures for applicants to the Housing Choice Voucher Program (HCVP) tenant-based assistance program and informal hearing procedures for families assisted by the Housing Choice Voucher Program (HCVP) tenant-based assistance program in addition to federal requirements found at 24 CFR 982?

If yes, list additions to federal requirements below:

2. Which PHA office 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

[24 CFR Part 903.7 9 (g)]

Exemptions from Component 7: Housing Choice Voucher Program (HCVP) 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 at Attachment A (state name) pa012a01

-or-

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

(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. 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 I (state name) pa012i01

-or-

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

B. HOPE VI and Public Housing Development and Replacement Activities (Non-Capital Fund)

Applicability of sub-component 7B: All PHAs administering public housing. Identify any approved HOPE VI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

- Yes No: a) Has the PHA received a HOPE VI revitalization grant? (if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary)
- b) Status of HOPE VI revitalization grant (complete one set of questions for each grant)
1. Development name:
 2. Development (project) number:
 3. Status of grant: (select the statement that best describes the current status)
 - Revitalization Plan under development
 - Revitalization Plan submitted, pending approval
 - Revitalization Plan approved
 - Activities pursuant to an approved Revitalization Plan underway
- Yes No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?
If yes, list development name/s below:
- Yes No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?
If yes, list developments or activities below:
- Yes No: e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?
If yes, list developments or activities below:

On May 28, 2003 the Executive Director submitted the Replacement Housing Factor Plan to Melinda Roberts, Director of Philadelphia Field Office of Public Housing. As of August 6, 2003 there has been no determination by HUD (See Attachment pa012k01).

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

Applicability of component 8: Housing Choice Voucher Program (HCVP) 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.)

Demolition/Disposition Activity Description
1a. Development name: Norristown Scattered Sites 1b. Development (project) number: PA26P012008
2. Activity type: Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one) Approved <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: <u>(12/28/98)</u>
5. Number of units affected: 16 6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 12/28/98 b. Projected end date of activity: approximately 12/28/02

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

[24 CFR Part 903.7 9 (i)]

Exemptions from Component 9; Housing Choice Voucher Program (HCVP) 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.)

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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.

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

- Part of the development
- Total development

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

Exemptions from Component 10; Housing Choice Voucher Program (HCVP) only PHAs are not required to complete this section.

?? Assessments of Reasonable Revitalization Pursuant to section 202 of the HUD FY 1996 HUD Appropriations Act

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

2. Activity Description

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

Conversion of Public Housing Activity Description
1a. Development name:
1b. Development (project) number:
2. What is the status of the required assessment? <ul style="list-style-type: none"> <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) <ul style="list-style-type: none"> <input type="checkbox"/> Conversion Plan in development <input type="checkbox"/> Conversion Plan submitted to HUD on: (DD/MM/YYYY) <input type="checkbox"/> Conversion Plan approved by HUD on: (DD/MM/YYYY) <input type="checkbox"/> Activities pursuant to HUD-approved Conversion Plan underway
5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one) <ul style="list-style-type: none"> <input type="checkbox"/> Units addressed in a pending or approved demolition application (date submitted or approved: _____) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: _____) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: _____)

<input type="checkbox"/> Requirements no longer applicable: vacancy rates are less than 10 percent <input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units <input type="checkbox"/> Other: (describe below)
--

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

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

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

Exemptions from Component 11A: Housing Choice Voucher Program (HCVP) 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.)

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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.)

Public Housing Homeownership Activity Description (Complete one for each development affected)	
1a. Development name:	
1b. Development (project) number:	
2. Federal Program authority:	<input type="checkbox"/> HOPE I <input type="checkbox"/> 5(h) <input type="checkbox"/> Turnkey III <input type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one)	<input type="checkbox"/> Approved; included in the PHA’s Homeownership Plan/Program <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application

4. Date Homeownership Plan/Program approved, submitted, or planned for submission:
(DD/MM/YYYY)

5. Number of units affected:

6. Coverage of action: (select one)

Part of the development Total development

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B. Housing Choice Voucher Program (HCVP) Tenant Based Assistance

1. Yes No: Does the PHA plan to administer a Housing Choice Voucher Program (HCVP) Homeownership program pursuant to Housing Choice Voucher Program (HCVP)(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982 ? (If “No”, skip to next component; if “yes”, describe each program description below (copy and complete questions for each program identified).

2. Program Description:

a. Size of Program

Yes No: Will the PHA limit the number of families participating in the Housing Choice Voucher Program (HCVP) 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 Housing Choice Voucher Program (HCVP) Homeownership Option program in addition to HUD criteria?

If yes, list criteria below:

b. What actions will the PHA undertake to implement the program this year (list)?

Already implemented, have had 24 closings.

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (l)]

Exemptions from Component 12: High performing and small PHAs are not required to complete this component. Housing Choice Voucher Program (HCVP)-Only PHAs are not required to complete sub-component C.

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A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

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

If yes, what was the date that agreement was 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 programs to eligible families
- Jointly administer programs
- Partner to administer a HUD Welfare-to-Work voucher program
- Joint administration of other demonstration program
- Other (describe)

B. Services and programs offered to residents and participants

(1) General

a. Self-Sufficiency Policies

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

- Public housing rent determination policies
- Public housing admissions policies
- Housing Choice Voucher Program (HCVP) admissions policies
- Preference in admission to Housing Choice Voucher Program (HCVP) 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 homeownership option participation
- Preference/eligibility for Housing Choice Voucher Program (HCVP) homeownership option participation
- Other policies (list below)

b. Economic and Social self-sufficiency programs

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

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

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 plans to take to achieve at least the minimum program size?
If no, list steps the PHA will take below:

C. Welfare Benefit Reductions

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

- Adopting appropriate changes to the PHA’s public housing rent determination policies and train staff to carry out those policies
- Informing residents of new policy on admission and reexamination
- Actively notifying residents of new policy at times in addition to admission and reexamination.

- Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
- Establishing a protocol for exchange of information with all appropriate TANF agencies
- Other: (list below)

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

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.79 (m)]

Exemptions from Component 13: High performing and small PHAs not participating in PHDEP and Housing Choice Voucher Program (HCVP) 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.

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

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

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

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

- Safety and security survey of residents
- Analysis of crime statistics over time for crimes committed "in and around" public housing authority
- Analysis of cost trends over time for repair of vandalism and removal of graffiti
- Resident reports
- PHA employee reports
- Police reports

- Demonstrable, quantifiable success with previous or ongoing anticrime/anti drug programs
- Other (describe below)

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

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

1. List the crime prevention activities the PHA has undertaken or plans 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-risk youth, adults, or seniors
- Volunteer Resident Patrol/Block Watchers Program
- Other (describe below)

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

C. Coordination between PHA and the police

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

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

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

D. Additional information as required by PHDEP/PHDEP Plan

PHAs eligible for FY 2000 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

- Yes No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes No: Has the PHA included the PHDEP Plan for FY 2002 in this PHA Plan?
- Yes No: This PHDEP Plan is an Attachment.

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

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15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

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

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

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

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

Exemptions from component 17: Housing Choice Voucher Program (HCVP) Only PHAs are not required to complete this component. High performing and small PHAs are not required to complete this component.

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

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

18. Other Information

[24 CFR Part 903.7 9 (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 (File name)
 - Provided below:

3. In what manner did the PHA address those comments? (select all that apply)
 - Considered comments, but determined that no changes to the PHA Plan were necessary.
 - The PHA changed portions of the PHA Plan in response to comments
List changes below:
 - Other: (list below)

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

1. Yes No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)

2. Yes No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)

3. Description of Resident Election Process
 - a. Nomination of candidates for place on the ballot: (select all that apply)
 - Candidates were nominated by resident and assisted family organizations
 - Candidates could be nominated by any adult recipient of PHA assistance
 - Self-nomination: Candidates registered with the PHA and requested a place on ballot
 - Other: (describe)

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 Housing Choice Voucher Program (HCVP) tenant-based assistance)
- Representatives of all PHA resident and assisted family organizations
- Other (list)

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: (Montgomery County, Pennsylvania)

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)
 - ?? To provide safe, decent, accessible and affordable rental housing for Montgomery County low income residents, for the elderly and for families with special needs.
 - ?? To provide residents with economic and self-sufficiency opportunities
 - ?? Modernization and revitalization of Public Housing units
 - ?? To provide first time homeownership opportunities for families who would otherwise not be able to afford it.
- Other: (list below)

2. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)
 - ?? Housing and supportive services for low income residents
 - ?? Accessibility and disability services
 - ?? Elderly services
 - ?? First time homebuyer opportunities
 - ?? CDBG funding opportunities
 - ?? Consolidated Plan supports MCHA's Capital Fund Plans

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: (Norristown Borough)
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 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)
 - ?? Modernization and revitalization of current Public Housing units
 - ?? To provide first time homeownership opportunities for families who would otherwise not be able to afford it.
 - Other: (list below)
3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)
 - ?? First time homebuyer opportunities

?? Consolidated Plan supports MCHA's Capital Fund Plans

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: (Abington Township)

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)

?? To provide safe, decent, accessible and affordable rental housing for Montgomery County low income residents, for the elderly and for families with special needs.

?? To provide residents with economic and self-sufficiency opportunities

?? Modernization and revitalization of Public Housing units

?? To provide first time homeownership opportunities for families who would otherwise not be able to afford it.

Other: (list below)

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

?? Housing and supportive services for low income residents

?? Accessibility and disability services

?? Elderly services

?? First time homebuyer opportunities

?? Consolidated Plan supports MCHA's Capital Fund Plans

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: (Lower Merion Township)

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)
 - ?? To provide safe, decent, accessible and affordable rental housing for Montgomery County low income residents, for the elderly and for families with special needs.
 - ?? To provide residents with economic and self-sufficiency opportunities
 - ?? To provide first time homeownership opportunities for families who would otherwise not be able to afford it.

 - Other: (list below)

3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)
 - ?? Housing and supportive services for low income residents
 - ?? Accessibility and disability services
 - ?? Elderly services
 - ?? First time homebuyer opportunities

D. Other Information Required by HUD

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

The Montgomery County Housing Authority defines substantial deviation or significant amendments or modification to its plan as discretionary changes in procedures or policies that fundamentally change the mission, goals, objectives or plans of the agency including the additions of non-emergency work items that are not included in the current 5-Year Action Plans, which require formal approval of the Board of Directors.

The Montgomery County Housing Authority's Five Year Plan for Capital Improvements has been submitted to our Responsible Entity, Montgomery County Housing Services, for environmental review processing during HUD's 75 day review period of this Agency Plan.

Annual Statement/Performance and Evaluation Report

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

PHA Name: Montgomery County Housing Authority	Grant Type and Number Capital Fund Program Grant No: 2004 Replacement Housing Factor Grant No:	Federal FY of Grant: 2004
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending:
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	\$163,477.00			
3	1408 Management Improvements	\$55,000.00			
4	1410 Administration	\$81,739.00			
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$40,774.00			
8	1440 Site Acquisition				
9	1450 Site Improvement	\$106,500.00			
10	1460 Dwelling Structures	\$187,754.00			
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures	\$121,598.00			
13	1475 Nondwelling Equipment	\$60,545.00			
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	\$817,387.00			
22	Amount of line 21 Related to LBP Activities	\$0.00			
23	Amount of line 21 Related to Section 504 compliance	\$13,600.00			

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

PHA Name: Montgomery County Housing Authority	Grant Type and Number Capital Fund Program Grant No: 2004 Replacement Housing Factor Grant No:	Federal FY of Grant: 2004
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Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending: Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
24	Amount of line 21 Related to Security – Soft Costs	\$10,000.00			
25	Amount of Line 21 Related to Security – Hard Costs	\$24,000.00			
26	Amount of line 21 Related to Energy Conservation Measures	\$164,874.00			

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

PHA Name: Montgomery County Housing Authority		Grant Type and Number Capital Fund Program Grant No: 2004 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PA-26-PO12-002 Bright Hope Estates	Shingle peaked roofs	1460	8	\$40,000.00				
“	Replace kitchen & lavatory faucets	1460	101	\$4,154.00				
	Subtotal			\$44,154.00				
PA-26-PO12-003 Bright Hope Manor	Replace hot water heaters	1460	78	\$30,000.00				
“	Re-point stone walls N&R buildings	1450	2,600 sf	\$20,000.00				
“	Replace steps	1450	L.S.	\$1,500.00				
“	Replace curb and sidewalk	1450	L.S.	\$10,000.00				
	Subtotal			\$61,500.00				

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

PHA Name: Montgomery County Housing Authority		Grant Type and Number Capital Fund Program Grant No: 2004 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PA-26-PO12-004 North Hills Manor	Replace heating & domestic hot water lines	1460	4 bldgs.	\$65,000.00				
“	Landscaping	1450	L.S.	\$5,000.00				
	Subtotal			\$70,000.00				
PA-26-PO12-005 Crest Manor	Top coat driveways	1450	20	\$20,000.00				
“	Stucco administration building	1470	1 bldg.	\$10,000.00				
“	Clean ducts	1460	25 units	\$10,000.00				
	Subtotal			\$40,000.00				
PA-26-PO12-006 Golden Age Manor	Replace front entrance overhang	1470	1 bldg.	\$20,000.00				
“	Replace LED lights & hallway light fixtures	1470	L.S.	\$5,000.00				
“	Replace tub and shower drains	1460	15 units	\$20,000.00				
“	Subtotal			\$45,000.00				

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

PHA Name: Montgomery County Housing Authority		Grant Type and Number Capital Fund Program Grant No: 2004 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PA-26-PO12-007 Robert P. Smith Towers	Upgrade boilers	1475	L.S.	\$22,000.00				
	Replace lavatory faucets	1470	160	\$12,000.00				
	Replace ground floor windows to operable	1470	44	\$20,000.00				
	Replace exterior side entrance doors	1470	1	\$10,000.00				
	Subtotal				\$64,000.00			
PA-26-PO12-008 Scattered Sites	Minor Rehabilitation	1460	1 unit	\$5,000.00				
	Subtotal			\$5,000.00				
PA-26-PO12-009 Marshall W. Lee Towers	Exhaust ventilators	1460	L.S.	\$10,000.00				
	“ Backflow preventer & booster pumps	1475	1 & 2	\$6,545.00				
	“ Emergency call system	1470	1 bldg.	\$4,000.00				
	Subtotal			\$20,545.00				

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

PHA Name: Montgomery County Housing Authority		Grant Type and Number Capital Fund Program Grant No: 2004 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PA-26-PO12-0011 Sidney Pollock House	Replace retaining wall	1450	L.S.	\$15,000.00				
	Replace refrigerators in handicap units	1460	8	\$3,600.00				
	Subtotal			\$18,600.00				
HA Wide Non-Dwelling Structures								
Cherry Court	Roof, HVAC system, water service, windows, plumbing, electric, etc.	1470	1 bldg.	\$40,598.00				
“	Parking lot barrier arm	1450	1	\$10,000.00				
453-455 High St.	Modernize Parking Lot at 453-455 High Street	1450	1	\$25,000.00				
	Subtotal			\$75,598.00				

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

PHA Name: Montgomery County Housing Authority		Grant Type and Number Capital Fund Program Grant No: 2004 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA-Wide	Operations: As outlined under Section 519 – Public housing capital and operating funds beginning in 2000 PHAs with 250 or more units can use up to 20% of their capital fund allocation for operating fund activities	1406		\$163,477.00				
HA-Wide	Management Improvements: Public Housing Computer Software Training & Technical Support	1408		\$45,000.00				
“	Applicant/Resident Screening Services: Criminal and credit history searches, training resident selection committees, hiring of investigators to investigate drug related crime and other criminal activities, etc.	1408		\$10,000.00				
Subtotal				\$55,000.00				

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

PHA Name: Montgomery County Housing Authority		Grant Type and Number Capital Fund Program Grant No: 2004 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA-Wide	Administration: To improve overall operations, maintain high PHMAP scores, increase rent collections, increase unit turnaround, help preserve rehabilitated units & sites, etc., and for environmental review costs.	1410		\$81,739.00				
HA-Wide	Fees & Costs: Architects & Engineers	1430		\$40,774.00				
HA-Wide	Non-Dwelling Equipment: Computer & Staff office equipment to improve overall operations, maintain high PHMAP scores, increase rent collections, increase unit turnaround, help preserve rehabilitated units and sites, etc.							
	Personal Computers	1475	3	\$7,500.00				
	Printers	1475	3	\$4,500.00				
	Staff Office Equipment: Typewriters, fax, copier, etc.	1475	L.S.	\$20,000.00				

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

PHA Name: Montgomery County Housing Authority		Grant Type and Number Capital Fund Program No: 2004 Replacement Housing Factor Grant No:					Federal FY of Grant: 2004	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates	
	Original	Revised	Actual	Original	Revised	Actual		
PA-26-PO12-002 Bright Hope Estates								
Shingle peaked roofs	03/31/06			09/30/07				
Kitchen & lavatory faucets	03/31/06			09/30/07				
PA-26-PO12-003 Bright Hope Manor								
Replace hot water heaters	03/31/06			09/30/07				
Re-point stone walls	03/31/06			09/30/07				
Replace steps	03/31/06			09/30/07				
Replace curb and sidewalk	03/31/06			09/30/07				

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

PHA Name: Montgomery County Housing Authority		Grant Type and Number Capital Fund Program No: 2004 Replacement Housing Factor Grant No:					Federal FY of Grant: 2004	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates	
	Original	Revised	Actual	Original	Revised	Actual		
PA-26-PO12-004 North Hills Manor								
Replace heating & domestic hot water lines	03/31/06			09/30/07				
Landscaping	03/31/06			09/30/07				
PA-26-PO12-005 Crest Manor								
Top coat driveways	03/31/06			09/30/07				
Stucco Admin. Bldg.	03/31/06			09/30/07				
Clean ducts	03/31/06			09/30/07				
PA-26-PO12-006 Golden Age Manor								
Replace front entrance overhang	03/31/06			09/30/07				
Replace LED lights & hallway light fixtures	03/31/06			09/30/07				
Replace tub and shower drains	03/31/06			09/30/07				

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

PHA Name: Montgomery County Housing Authority		Grant Type and Number Capital Fund Program No: 2004 Replacement Housing Factor Grant No:					Federal FY of Grant: 2004	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates	
	Original	Revised	Actual	Original	Revised	Actual		
PA-26-PO12-007 Robert P. Smith Towers								
Upgrade boilers	03/31/06			09/30/07				
Replace lavatory faucets	03/31/06			09/30/07				
Replace ground floor windows to operable	03/31/06			09/30/07				
Replace exterior side entrance doors	03/31/06			09/30/07				
PA-26-PO12-008 Scattered Sites								
Minor Rehabilitation	03/31/06			09/30/07				
PA-26-PO12-009 Marshall W. Lee Towers								
Exhaust ventilators	03/31/06			09/30/07				
Backflow preventer & booster pump	03/31/06			09/30/07				
Emergency call system	03/31/06			09/30/07				

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

PHA Name: Montgomery County Housing Authority		Grant Type and Number Capital Fund Program No: 2004 Replacement Housing Factor Grant No:					Federal FY of Grant: 2004	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates	
	Original	Revised	Actual	Original	Revised	Actual		
PA-26-PO12-0011 Sidney Pollock House								
Replace retaining wall	03/31/06			09/30/07				
Replace refrigerators in handicap units	03/31/06			09/30/07				
HA-WIDE								
Cherry Court: Roof, HVAC system, water service, windows, plumbing, electric, etc.	03/31/06			09/30/07				
Parking lot barrier arm	03/31/06			09/30/07				
453-455 High St.: Modernize parking lot	03/31/06			09/30/07				

Required Attachment B : Resident Advisory Board

PA-12-2/3 BRIGHT HOPE MANOR/ ESTATES

**Marie Johnson – Vice President
Yvonne Maldonato – Treasurer
Laresten Walton – Assistant Treasurer
Dawn Ziegler - Secretary**

PA-12-4 NORTH HILLS MANOR

**Sherry Rivers – President
Sharon Hendrix**

PA-12-5 CREST MANOR

**Carroll Woodridge – President
Marcia Diggs – Vice President
Marcella Myers - Secretary**

PA-12-6 GOLDEN AGE MANOR

**Janice Challingsworth – President
Marse Smith – Vice President
Claire Pipp, Treasurer
Pat Ritter, Secretary
Christine Poullott, Chaplin**

PA-12-7 ROBERT P. SMITH TOWERS

**Virginia Hennessey – President
Charles Wagner – Vice President
John Evenoff - Treasurer
Regina Grillo – Secretary
Regina Paliferro – Chaplin
Anthony Almond - Council**

PA-12-9 MARSHALL LEE TOWERS

**Daniel Harrington – President
Jack Peterson – Vice President
Mary Durvas – Treasurer
Jane Manduke – Secretary
Bob Wright - Chaplain**

PA-12-11 SIDNEY POLLOCK HOUSE

**Jacquelyne Cellucci – President
Marie Haller – Vice President
Frances Carter – Treasurer
Loretta Chaback – Secretary
Mary Sheha – Council
Joseph Puc - Council
Aldonna Landis – Council
Evelyn Minotto – Council**

HOUSING CHOICE VOUCHER PROGRAM

Jamialah Boyd – Representative

Required Attachment C : Resident Member on the PHA Governing Board

1. Yes No: Does the PHA governing board include at least one member who is directly assisted by the PHA this year? (if no, skip to #2)

A. Name of resident member(s) on the governing board: Charles Wagner

B. How was the resident board member selected: (select one)?

- Elected
 Appointed

C. The term of appointment is (include the date term expires): July 27, 2000 through July 27, 2005

2. A. If the PHA governing board does not have at least one member who is directly assisted by the PHA, why not?

- the PHA is located in a State that requires the members of a governing board to be salaried and serve on a full time basis
 the PHA has less than 300 public housing units, has provided reasonable notice to the resident advisory board of the opportunity to serve on the governing board, and has not been notified by any resident of their interest to participate in the Board.
 Other (explain):

B. Date of next term expiration of a governing board member: December 31, 2006

C. Name and title of appointing official(s) for governing board (indicate appointing official for the next position):

Montgomery County Commissioners

Michael D. Marino, Esq., Chairman
James R. Mathews
Ruth S. Damsker

Required Attachment D : Housing Choice Voucher Program Homeownership Capacity Statement

Capacity of the PHA to Administer a Section 8 Homeownership Program

The PHA has demonstrated its capacity to administer the program by (select all that apply):

- a. Establishing a minimum homeowner downpayment requirement of at least 3 percent of purchase price and requiring that at least 1 percent of the purchase price comes from the family's resources.
- b. Requiring that financing for purchase of a home under its Section 8 homeownership will be provided, insured or guaranteed by the state or Federal government; comply with secondary mortgage market underwriting requirements; or comply with generally accepted private sector underwriting standards.
- c. Partnering with a qualified agency or agencies to administer the program (list name(s) and years of experience below).

Partner with Consumer Credit Counseling Agency, Fannie Mae, Freddie Mac, USDA Rural Housing and PHFA.

- d. Demonstrating that it has other relevant experience (list experience below).

The Montgomery County Housing Authority (MCHA) has been administering First Time Homeownership Programs for approximately six (6) years under HUD's 5(h) Homeownership Program and two (2) years under the HCVP Homeownership option. Over this period of time we have sold approximately 90 homes to low to moderate income families.

All of the families that purchased homes under the MCHA Homeownership Programs have been successful in their First Time Homeownership endeavors, there have been no foreclosures on any of the units sold and minimal, if any, problems expressed by the homeowners to the MCHA.

In administration of our Homeownership Programs, over the past years, the MCHA staff has gained capacity in the following areas:

- ?? Counseling First Time Home buyers; and
- ?? Understanding underwriting requirements; and
- ?? Helping families secure mortgages; and
- ?? Understanding procedures banks and other mortgage providers follow when working with families interested in securing mortgages; and
- ?? Understanding affordability requirements and affordability ratios used by lenders.

The MCHA has been an active member of Montgomery County's "Partners For Homeownership" group and has been involved with the planning for and participation in First Time Home Buyer Fairs sponsored by this group.

Our staff, administering our Homeownership Programs, has extensive experience working with First Time Homebuyers and has taken many classes in working with first time homebuyers. We have one full time staff member dedicated to administering our Homeownership Programs, a part time Administrative Assistant, and several other support staff for counseling services.

To further demonstrate the capacity of the MCHA in administration of First Time Home Buyers Programs for low-income families it must be noted that the MCHA was one of 12 Public Housing Agencies authorized by HUD to administer a Housing Choice Voucher Program Demonstration Homeownership Program in accordance with the Proposed Rule for this Program.

Required Attachment: E : AGENCY PLAN PROGRESS REPORT

The Montgomery County Housing Authority (MCHA) has accomplished many of its goals the past year and will continue to work to ensure safe, decent and affordable housing in Montgomery County. The MCHA has received high performer ratings in the Public Housing Program with an overall PHAS score of 95% and a FY2002 physical assessment score of 29 out of a possible 30. It has attempted to reduce vacancies in public housing by achieving a 19.71 day average turnaround. We are proud to report that we have received 1085 new vouchers in recent years, which has expanded our supply of available assistance; as of 7/31/03 we are at a 90% leasing ratio; we continue to put new units in the program every month. The MCHA provides quality housing which is evident by receiving 10 points out of a possible 10 for our resident survey results for FY 2002. In addition, it operates a very successful modernization program with the aid of capital funds. We have received top scores in this area but the real sign of success is hearing all the “thank you’s” from happy residents.

The MCHA strives to increase housing choices. The MCHA is very involved in the Voucher Homeownership Program. As of 7/31/03, 23 families have purchased homes under this Housing Choice Voucher Program option. Through our 5(h) Homeownership Program, we continue to offer affordable homes to residents who otherwise could never afford them. As of 7/31/03, the MCHA has sold 67 homes to low income families under the 5(h) Homeownership Program.

In order to provide an improved living environment for our residents, the MCHA has implemented several Public Housing security improvements. FY 2001 Public Housing Drug Elimination Program funds are being expended and work items will include additional police patrol, as well as physical improvements that will help deter crime. This along with strong applicant screening and tougher eviction policies will ensure housing opportunities are offered to deserving families. As of 6/30/03 the MCHA has completed 370 background checks for the Public Housing Program for FY2002. The MCHA has denied eligibility to 11 Public Housing applicants per the requirements of our background screening policies and unfortunately have evicted one family for drug related lease violations. As a result of the Quality Housing Work Responsibility Act, the MCHA has implemented background checking policies for our HCVP; we have completed 709 background checks of HCVP applicants in FY2003 as of 7/31/03 of this year.

The MCHA promotes self-sufficiency and asset development of assisted households. Our very successful Family Self-Sufficiency Programs for Public Housing and Housing Choice Voucher Program participants have resulted in more families completing their contract goals and drawing down their accrued escrow. MCHA staff works very closely with our Welfare-to-Work and Family Self-Sufficiency Program families. We have added 25 additional slots to our Public Housing Family Self-Sufficiency Program due to increased resident interest.

The MCHA continues to maintain mutual respect and dignity with all residents of Montgomery County, assures financial responsibility and integrity by all participants and residents and achieves excellence through innovative program development and effective program management. The MCHA’s mission and goals are for the benefit of all residents of Montgomery County.

Annual Statement / Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY	Grant Type and Number Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No:	Federal FY of Grant: 2000
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Original Annual Statement
 Reserve for Disaster/Emergencies
 Revised Annual Statement (revision no:)

Performance and Evaluation Report for Period Ending: 06/30/03
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds	\$0.00	\$0.00	\$0.00	\$0.00
2	1406 Operations	\$200,000.00	\$200,000.00	\$200,000.00	\$200,000.00
3	1408 Management Improvements	\$41,050.00	\$30,408.00	\$13,442.00	\$13,442.00
4	1410 Administration	\$108,819.00	\$103,828.00	\$103,828.00	\$103,828.00
5	1411 Audit	\$0.00	\$0.00	\$0.00	\$0.00
6	1415 Liquidated Damages	\$0.00	\$0.00	\$0.00	\$0.00
7	1430 Fees and Costs	\$15,000.00	\$56,000.00	\$56,028.00	\$56,028.00
8	1440 Site Acquisition	\$0.00	\$0.00	\$0.00	\$0.00
9	1450 Site Improvement	\$72,000.00	\$116,000.00	\$124,557.00	\$124,557.00
10	1460 Dwelling Structures	\$524,908.00	\$396,691.00	\$410,925.00	\$410,925.00
11	1465.1 Dwelling Equipment-Nonexpendable	\$20,000.00	\$0.00	\$0.00	\$0.00
12	1470 Nondwelling Structures	\$42,000.00	\$118,000.00	\$112,911.00	\$112,911.00
13	1475 Nondwelling Equipment	\$14,500.00	\$17,350.00	\$16,586.00	\$16,586.00
14	1485 Demolition	\$0.00	\$0.00	\$0.00	\$0.00
15	1490 Replacement Reserve	\$0.00	\$0.00	\$0.00	\$0.00
16	1492 Moving to Work Demonstration	\$0.00	\$0.00	\$0.00	\$0.00
17	1495.1 Relocation Costs	\$0.00	\$0.00	\$0.00	\$0.00
18	1499 Development Activities	\$0.00	\$0.00	\$0.00	\$0.00
19	1501 Collateralization or Debt Service				
20	1502 Contingency (may not exceed 8% of line 19)	\$0.00	\$0.00	\$0.00	\$0.00
21	Amount of Annual Grant (Sum of lines 2-20)	\$1,038,277.00	\$1,038,277.00	\$1,038,277.00	\$1,038,277.00
22	Amount of Line 21 Related to LBP Activities	\$0.00	\$0.00	\$0.00	\$0.00
23	Amount of Line 21 Related to Section 504 Compliance	\$0.00	\$0.00	\$0.00	\$0.00
24	Amount of Line 21 Related to Security - Soft Costs	\$10,000.00	\$8,000.00	\$2,227.00	\$2,227.00
25	Amount of Line 21 Related to Security - Hard Costs	\$0.00	\$0.00	\$0.00	\$0.00
26	Amount of Line 21 Related to Energy Conservation Measures	\$366,520.00	\$305,886.00	\$305,886.00	\$304,373.00

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No:				Federal FY of Gra 2000	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
PA-12-2 BRIGHT HOPE ESTATES	SUBSTANTIAL REHABILITATION OF DWELLING UNITS: ELECTRIC, PLUMBING, KITCHENS, BATHROOMS, WINDOWS, DOORS, FLOORS, ROOFS, ETC. 1400 120 001	1460	2 units	\$30,000.00	\$118,000.00	\$112,911.00	\$112,911.00
	SUBSTANTIAL REHABILITATION OF NON-DWELLING UNIT: ELECTRIC, PLUMBING, KITCHENS, BATHROOMS, WINDOWS, DOORS, FLOORS, ROOFS, ETC. 1400 120 002	1470	2 units	\$30,000.00	\$118,000.00	\$112,911.00	\$112,911.00
	REPLACE SHINGLE PEAKED ROOFS 1400 120 003	1460	4 Bldgs	\$45,000.00	\$0.00	\$0.00	\$0.00
	INSTALL AND REPLACE HOT WATER HEATERS 1400 120 004	1460	50	\$20,000.00	\$0.00	\$0.00	\$0.00
	SITE IMPROVEMENT 1400 120 005	1450	L.S.	\$5,000.00	\$0.00	\$0.00	\$0.00
	REPLACE SIDEWALKS/PORCH PADS 1400 120 006	1450	L.S.	\$5,000.00	\$0.00	\$0.00	\$0.00
	SUBTOTAL				\$135,000.00	\$236,000.00	\$225,822.00

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No:				Federal FY of Gra 2000	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
PA-12-3 BRIGHT HOPE MANOR	REPLACE SHINGLE PORCH ROOFS 1400 120 007	1460	78 units	\$20,000.00	\$0.00	\$0.00	\$0.00
	RESURFACE & PAINT PARKING LOT 1400 120 008	1460	L.S.	\$10,000.00	\$5,700.00	\$5,700.00	\$5,700.00
	REPLACE MAINTENANCE SHOP DOOR 1400 120 009	1470	2	\$6,000.00	\$0.00	\$0.00	\$0.00
	REPLACE MAINTENANCE SHOP FENCE 1400 120 010	1470	43 lf	\$6,000.00	\$0.00	\$0.00	\$0.00
	REMOVE BOILER ROOM CHIMNEY 1400 120 011	1470	1	\$10,000.00	\$0.00	\$0.00	\$0.00
	SITE IMPROVEMENT 1400 120 012	1450		\$10,000.00	\$5,000.00	\$1,850.00	\$1,850.00
	SUBTOTAL				\$62,000.00	\$10,700.00	\$7,550.00
PA-12-4 NORTH HILLS MANOR	REPLACE DETERIORATED SIDEWALKS 1400 120 013	1450	L.S.	\$30,000.00	\$0.00	\$0.00	\$0.00
	INTERIOR STAIR TREADS 1400 120 014	1460	50 units	\$15,000.00	\$17,105.00	\$17,105.00	\$17,105.00
	SITE IMPROVEMENT 1400 120 015	1450	L.S.	\$10,000.00	\$5,000.00	\$4,125.00	\$4,125.00
SUBTOTAL				\$55,000.00	\$22,105.00	\$21,230.00	\$21,230.00
PA-12-5 CREST MANOR	REPLACE HOT WATER HEATERS & FURNACES 1400 120 016	1460	36 units	\$75,000.00	\$0.00	\$0.00	\$0.00
	REPLACE PANTRY SHELVING 1400 120 017	1460	36 units	\$20,000.00	\$0.00	\$0.00	\$0.00
SUBTOTAL				\$95,000.00	\$0.00	\$0.00	\$0.00

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No:				Federal FY of Gra 2000	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
PA-12-6 GOLDEN AGE MANOR	NEW BATHROOMS: SINKS, TUBS, SHOWERS, TOILETS, FAUCETS, FLOORS, ETC. 1400 120 018	1460	85 units	\$50,607.00	\$0.00	\$0.00	\$0.00
	REPLACE FRONT SIDEWALK & STEPS 1400 120 019	1450	L.S.	\$12,000.00	\$53,000.00	\$59,291.00	\$59,291.00
	REMOVE ASBESTOS 1400 120 020	1460	L.S.	\$16,000.00	\$0.00	\$0.00	\$0.00
	WINDOW SHADES 1400 120 021	1460	85 units	\$4,000.00	\$1,000.00	\$167.00	\$167.00
	WINDOW REPLACEMENT 1400 120 021A	1460		\$0.00	\$2,000.00	\$374.00	\$374.00
	SUBTOTAL			\$82,607.00	\$56,000.00	\$59,832.00	\$59,832.00
PA-12-7 ROBERT P. SMITH TOWERS	REPLACE HOT WATER HEATERS 1400 120 022	1460	2	\$10,000.00	\$0.00	\$11,839.00	\$11,839.00
	DOMESTIC WATER BOOSTER PUMP 1400 120 023	1460	1	\$2,000.00	\$0.00	\$0.00	\$0.00
	INSTALL ROOFTOP AIR HANDLING UNIT (HVAC) 1400 120 024	1460	1	\$25,000.00	\$0.00	\$0.00	\$0.00
	REPLACE HALLWAY DROP CEILING 1400 120 025	1460	1 bldg	\$15,000.00	\$0.00	\$0.00	\$0.00
	WINDOW SHADES 1400 120 026	1460	80	\$4,000.00	\$0.00	\$0.00	\$0.00
	SUBTOTAL			\$56,000.00	\$0.00	\$11,839.00	\$11,839.00
PA-12-8 SCATTERED SITES	MINOR REHAB 1400 120 027	1460	1 unit	\$5,000.00	\$3,000.00	\$1,998.00	\$1,998.00
	SUBTOTAL			\$5,000.00	\$3,000.00	\$1,998.00	\$1,998.00

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No:				Federal FY of Gra 2000	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
PA-12-9 MARSHALL W. LEE TOWERS	NEW KITCHENS: CABINETS, SINKS, FAUCETS, COUNTERTOPS, FLOORS, ELECTRIC, PLUMBING, ETC. 1400 120 028	1460	40 units	\$80,000.00	\$69,886.00	\$69,886.00	\$69,886.00
	INSTALL BATHROOM HEAT LAMPS 1400 120 029	1460	80 units	\$10,000.00	\$0.00	\$0.00	\$0.00
	INSTALL ROOFTOP AIR HANDLING UNIT (HVAC) 1400 120 030	1460	1	\$20,000.00	\$0.00	\$0.00	\$0.00
	RANGES & RANGE HOODS 1400 120 031	1465.1	40	\$20,000.00	\$0.00	\$0.00	\$0.00
	REPLACE SIDEWALK 1400 120 031A	1450		\$0.00	\$53,000.00	\$59,291.00	\$59,291.00
	SUBTOTAL			\$130,000.00	\$122,886.00	\$129,177.00	\$129,177.00
PA-12-11 SIDNEY POLLOCK HOUSE	REAR ENTRANCE DOOR 1400 120 032	1460	1	\$27,301.00	\$0.00	\$0.00	\$0.00
	REPLACE SOLARIUM CARPETS 1400 120 033	1460	3	\$9,000.00	\$0.00	\$0.00	\$0.00
	REPLACE COMMUNITY ROOM DIVIDER 1400 120 034	1460	1	\$2,000.00	\$0.00	\$0.00	\$0.00
	AIR HANDLING 1400 120 034A	1460		\$0.00	\$180,000.00	\$190,945.00	\$190,945.00
	SUBTOTAL			\$38,301.00	\$180,000.00	\$190,945.00	\$190,945.00

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No:				Federal FY of Gra 2000	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
HA-WIDE	OPERATIONS: AS OUTLINED UNDER SECTION 519- PUBLIC HOUSING CAPITAL AND OPERATING FUNDS, BEGINNING IN 2000, PHAs WITH 250 OR MORE UNITS CAN USE UP TO 20% OF THEIR CAPITAL FUND ALLOCATION FOR OPERATING FUND ACTIVITIES 1400 120 035	1406		\$200,000.00	\$200,000.00	\$200,000.00	\$200,000.00
HA-WIDE	MANAGEMENT IMPROVEMENTS: FUNDS TO RMC'S TO BE USED TOWARDS RESIDENT INITIATIVES, SUCH AS JOB TRAINING,COUNSELING & TECHNICAL SUPPORT, RESIDENT PROGRAMS & SERVICES, WHICH INCLUDE DIRECT SOCIAL SERVICES & SUMMER YOUTH CAMP WHICH CONTAINS DRUG PREVENTION, ELIMINATION & JOB TRAINING COMPONENTS 1400 120 036	1408	7 RMC'S	\$6,050.00	\$6,050.00	\$5,030.00	\$5,030.00
	PUBLIC HOUSING COMPUTER SOFTWARE, TRAINING & TECHNICAL SUPPORT 1400 120 037	1408		\$25,000.00	\$16,358.00	\$3,905.00	\$3,905.00
	APPLICANT/RESIDENT SCREENING SERVICES: CRIMINAL AND CREDIT HISTORY SEARCHES, TRAINING RESIDENT SELECTION COMMITTEES, HIRING OF INVESTIGATORS TO INVESTIGATE DRUG-RELATED CRIME & OTHER CRIMINAL ACTIVITIES, ETC 1400 120 038	1408		\$10,000.00	\$8,000.00	\$4,507.00	\$4,507.00
	SUBTOTAL			\$41,050.00	\$30,408.00	\$13,442.00	\$13,442.00

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

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No:				Federal FY of Gra 2000	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
HA-WIDE	ADMINISTRATION: TO IMPROVE OVERALL OPERATIONS, MAINTAIN HIGH PHMAP SCORES, INCREASE RENT COLLECTIONS, INCREASE UNIT TURNAROUND, HELP PRESERVE REHABILITATED UNITS & SITES, ETC., AND FOR ENVIRONMENTAL REVIEW COSTS 1400 120 039	1410		\$108,819.00	\$103,828.00	\$103,828.00	\$103,828.00
HA-WIDE	FEES & COSTS ARCHITECT & ENGINEERING FEES 1400 120 040	1430	4 CONTRACTS	\$15,000.00	\$56,000.00	\$56,028.00	\$56,028.00
HA-WIDE	NON-DWELLING EQUIPMENT: COMPUTER & STAFF OFFICE EQUIPMENT: TO IMPROVE OVERALL OPERATIONS, MAINTAIN HIGH PHMAP SCORES, INCREASE RENT COLLECTIONS, INCREASE UNIT TURNAROUND, HELP PRESERVE REHABILITATED UNITS & SITES, ETC.						
	PERSONAL COMPUTERS 1400 120 041	1475	3	\$7,500.00	\$9,690.00	\$9,080.00	\$9,080.00
	PRINTERS 1400 120 042	1475	3	\$4,500.00	\$2,660.00	\$3,270.00	\$3,270.00
	75% MAINTENANCE CART 1400 120 043	1475	1	\$2,500.00	\$0.00	\$0.00	\$0.00
	STAFF OFFICE EQUIPMENT 1400 120 043A	1475.1		\$0.00	\$5,000.00	\$4,236.00	\$4,236.00
	SUBTOTAL			\$14,500.00	\$17,350.00	\$16,586.00	\$16,586.00
HA WIDE	GRAND TOTAL			\$1,038,277.00	\$1,038,277.00	\$1,038,277.00	\$1,038,277.00

06/30/03

int:

Status of Work

IN PROCESS, BALANCE
TO CF2001

IN PROCESS, BALANCE
TO CF2001

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

int:

Status of Work

TRANSFER TO FUTURE CF

COMPLETED

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

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Status of Work

TRANSFER TO FUTURE CF

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TRANSFER TO FUTURE CF

COMPLETED

int:

Status of Work

COMPLETED

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

COMPLETED
CG708 1ST YR

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

COMPLETED
CG707 1ST YR

int:

Status of Work

COMPLETED

COMPLETED

COMPLETED

COMPLETED

int:

Status of Work

COMPLETED

COMPLETED

COMPLETED

COMPLETED

TRANSFER TO FUTURE CF

COMPLETED

CF2000 3RD YR

Annual Statement / Performance and Evaluation Report

06/30/03

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part III: Implementation Schedule (CF2000)

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PA-12-2 REHAB DWELLING UNITS 1400 120 001	09/30/02		07/31/01	09/30/03			IN PROCESS, BALANCE TO CF2001
REHAB NON-DWELLING UNITS 1400 120 002	09/30/02		07/31/01	09/30/03			IN PROCESS, BALANCE TO CF2001
REPLACE SHINGLE PEAKED ROOFS 1400 120 003	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
INSTALL & REPLACE HOT WATER HEATERS 1400 120 004	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
SITE IMPROVEMENT 1400 120 005	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
REPLACE SIDEWALKS & PORCH PADS 1400 120 006	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND

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

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PA-12-3							
REPLACE SHINGLE PORCH ROOFS 1400 120 007	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
RESURFACE & PAINT PARKING LOT 1400 120 008	09/30/02		12/31/01	09/30/03		12/31/01	COMPLETED
REPLACE MAINTENANCE SHOP DOOR 1400 120 009	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
REPLACE MAINTENANCE SHOP FENCE 1400 120 010	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
REMOVE BOILER ROOM CHIMNEY 1400 120 011	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
SITE IMPROVEMENT 1400 120 012	09/30/02		12/31/00	09/30/03		12/31/00	COMPLETED
PA-12-4							
REPLACE DETERIORATED SIDEWALKS 1400 120 013	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
INTERIOR STAIR TREADS 1400 120 014	09/30/02		12/31/00	09/30/03		12/31/00	COMPLETED
SITE IMPROVEMENT 1400 120 015	09/30/02		08/31/01	09/30/03		08/31/01	COMPLETED

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PA-12-5 REPLACE HOT WATER HEATERS & FURNACES 1400 120 016	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
REPLACE PANTRY SHELVING 1400 120 017	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
PA-12-6 NEW BATHROOMS 1400 120 018	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
REPLACE FRONT SIDEWALK & STEPS 1400 120 019	09/30/02		11/30/01	09/30/03		08/31/02	COMPLETED
REMOVE ASBESTOS 1400 120 020	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
WINDOW SHADES 1400 120 021	09/30/02		02/28/02	09/30/03		02/28/02	COMPLETED
REPLACE WINDOWS 1400 120 021A		05/31/02	05/31/02		07/31/02	07/31/02	COMPLETED

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

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PA-12-7							
REPLACE HOT WATER HEATERS 1400 120 022	09/30/02		09/30/02	09/30/03		11/30/02	COMPLETED
DOMESTIC WATER BOOSTER PUMP 1400 120 023	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
INSTALL ROOFTOP AIR HANDLING UNIT 1400 120 024	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
REPLACE HALLWAY DROP CEILING 1400 120 025	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
WINDOW SHADES 1400 120 026	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
PA-12-8							
MINOR REHAB 1400 120 027	09/30/02		10/31/01	09/30/03		10/31/01	COMPLETED

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PA-12-9							
NEW KITCHENS 1400 120 028	09/30/02		12/31/00	09/30/03		07/31/01	COMPLETED
INSTALL BATHROOM HEAT LAMPS 1400 120 029	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
INSTALL ROOFTOP AIR HANDLING UNIT 1400 120 030	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
RANGES & RANGE HOODS 1400 120 031	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
REPLACE SIDEWALKS 1400 120 031A		11/30/01	11/30/01		08/31/02	08/31/02	COMPLETED
PA-12-11							
REAR ENTRANCE DOOR 1400 120 032	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
REPLACE SOLARIUM CARPETS 1400 120 033	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
REPLACE COMMUNITY ROOM DIVIDER 1400 120 034	09/30/02			09/30/03			TRANSFER TO FUTURE CAPITAL FUND
AIR HANDLING 1400 120 034A		12/31/01	12/31/01		08/31/02	08/31/02	COMPLETED

Annual Statement / Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY	Grant Type and Number Capital Fund Program Grant No: 2001 Replacement Housing Factor Grant No:	Federal FY of Grant: 2001
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Original Annual Statement
 Reserve for Disaster/Emergencies
 Revised Annual Statement (revision no:)

 Performance and Evaluation Report for Period Ending: 06/30/03
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds	\$0.00	\$0.00	\$0.00	\$0.00
2	1406 Operations	\$207,655.00	\$207,655.00	\$207,655.00	\$207,655.00
3	1408 Management Improvements	\$91,050.00	\$53,392.00	\$53,392.00	\$53,392.00
4	1410 Administration	\$105,000.00	\$105,024.00	\$105,024.00	\$105,024.00
5	1411 Audit	\$0.00	\$0.00	\$0.00	\$0.00
6	1415 Liquidated Damages	\$0.00	\$0.00	\$0.00	\$0.00
7	1430 Fees and Costs	\$50,000.00	\$22,334.00	\$22,334.00	\$22,334.00
8	1440 Site Acquisition	\$0.00	\$0.00	\$0.00	\$0.00
9	1450 Site Improvement	\$40,000.00	\$19,562.00	\$19,562.00	\$19,562.00
10	1460 Dwelling Structures	\$475,043.00	\$136,731.00	\$136,731.00	\$136,731.00
11	1465.1 Dwelling Equipment-Nonexpendable	\$0.00	\$0.00	\$0.00	\$0.00
12	1470 Nondwelling Structures	\$52,000.00	\$438,105.00	\$438,105.00	\$438,105.00
13	1475 Nondwelling Equipment	\$29,500.00	\$67,445.00	\$67,445.00	\$67,445.00
14	1485 Demolition	\$0.00	\$0.00	\$0.00	\$0.00
15	1490 Replacement Reserve	\$0.00	\$0.00	\$0.00	\$0.00
16	1492 Moving to Work Demonstration	\$0.00	\$0.00	\$0.00	\$0.00
17	1495.1 Relocation Costs	\$0.00	\$0.00	\$0.00	\$0.00
18	1499 Development Activities	\$0.00	\$0.00	\$0.00	\$0.00
19	1501 Collateralization or Debt Service	\$0.00	\$0.00	\$0.00	\$0.00
20	1502 Contingency (may not exceed 8% of line 19)	\$0.00	\$0.00	\$0.00	\$0.00
21	Amount of Annual Grant (Sum of lines 2-20)	\$1,050,248.00	\$1,050,248.00	\$1,050,248.00	\$1,050,248.00
22	Amount of Line 21 Related to LBP Activities	\$0.00	\$0.00	\$0.00	\$0.00
23	Amount of Line 21 Related to Section 504 Compliance	\$0.00	\$0.00	\$0.00	\$0.00
24	Amount of Line 21 Related to Security - Soft Costs	\$10,000.00	\$10,000.00	\$0.00	\$0.00
25	Amount of Line 21 Related to Security - Hard Costs	\$0.00	\$0.00	\$0.00	\$0.00
26	Amount of Line 21 Related to Energy Conservation Measures	\$215,043.00	\$215,043.00	\$0.00	\$0.00

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: 2001 Replacement Housing Factor Grant No:				Federal FY of Gra 2001	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
PA-26-P012-002	SITE IMPROVEMENT 1400 121 001	1450		\$15,000.00	\$1,954.00	\$1,954.00	\$1,954.00
BRIGHT HOPE ESTATES	REPLACE FENCING 1400 121 002	1470		\$4,000.00	\$0.00	\$0.00	\$0.00
	REPLACE SIDEWALKS 1400 121 003	1450		\$3,000.00	\$12,479.00	\$12,479.00	\$12,479.00
	REPLACE AND INSTALL HOT WATER HEATERS 1400 121 004	1460		\$20,000.00	\$0.00	\$0.00	\$0.00
	STUCCO MAINTENANCE SHOP 1400 121 005	1470		\$15,000.00	\$0.00	\$0.00	\$0.00
	REHAB OF DWELLING UNITS 1400 121 005A	1460		\$0.00	\$55,420.00	\$55,420.00	\$55,420.00
	SUBTOTAL			\$57,000.00	\$69,853.00	\$69,853.00	\$69,853.00
PA-26-P012-003	UPGRADE LAUNDRY FACILITIES 1400 121 006	1470		\$15,000.00	\$1,224.00	\$1,224.00	\$1,224.00
BRIGHT HOPE MANOR	REPLACE SIDEWALKS 1400 121 007	1450		\$7,000.00	\$0.00	\$0.00	\$0.00
	SUBTOTAL			\$22,000.00	\$1,224.00	\$1,224.00	\$1,224.00

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

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: 2001 Replacement Housing Factor Grant No:				Federal FY of Grant 2001	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
PA-26-P012-004 NORTH HILLS MANOR	MASONRY TRASH STORAGE AREAS 1400 121 008	1470		\$15,000.00	\$0.00	\$0.00	\$0.00
	RESURFACE AND PAINT BASKETBALL COURT 1400 121 009	1470		\$3,000.00	\$2,000.00	\$2,000.00	\$2,000.00
	UNDERGROUND HOT & DOMESTIC WATER LINES 1400 121 010	1460		\$42,043.00	\$0.00	\$0.00	\$0.00
	INSTALL MARVEL FITTINGS ON KITCHEN AND BATH LINES 1400 121 011	1460		\$13,000.00	\$0.00	\$0.00	\$0.00
	MODERNIZE BATHROOM VANITIES 1400 121 012	1460		\$15,000.00	\$0.00	\$0.00	\$0.00
	BASKET BALL COURT POLES, ETC. 1400 121 012A	1450		\$0.00	\$5,129.00	\$5,129.00	\$5,129.00
	SUBTOTAL				\$88,043.00	\$7,129.00	\$7,129.00
PA-26-P012-005 CREST MANOR	REPLACE SIDEWALKS 1400 121 013	1450		\$15,000.00	\$0.00	\$0.00	\$0.00
	REPLACE VINYL TILE FLOORS 1400 121 014	1460		\$30,000.00	\$0.00	\$0.00	\$0.00
	REPLACE INTERIOR DOORS 1400 121 015	1460		\$15,000.00	\$0.00	\$0.00	\$0.00
SUBTOTAL				\$60,000.00	\$0.00	\$0.00	\$0.00
PA-26-P012-006 GOLDEN AGE MANOR	REPLACE HALLWAY AND FIRST FLOOR CARPET 1400 121 016	1460		\$40,000.00	\$0.00	\$0.00	\$0.00
	INSTALL HVAC BLOWER CABINET 1400 121 017	1460		\$20,000.00	\$9,364.00	\$9,364.00	\$9,364.00
SUBTOTAL				\$60,000.00	\$9,364.00	\$9,364.00	\$9,364.00

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

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: 2001 Replacement Housing Factor Grant No:				Federal FY of Gra 2001	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
PA-26-P012-007 ROBERT P. SMITH TOWERS	REPLACE WINDOWS 1400 121 018	1460		\$45,000.00	\$0.00	\$0.00	\$0.00
	UPGRADE ELEVATOR EQUIPMENT 1400 121 019	1460		\$55,000.00	\$0.00	\$0.00	\$0.00
	SUBTOTAL			\$100,000.00	\$0.00	\$0.00	\$0.00
PA-26-P012-008 SCATTERED SITES	MINOR REHAB 1400 121 020	1460		\$5,000.00	\$0.00	\$0.00	\$0.00
	SUBTOTAL			\$5,000.00	\$0.00	\$0.00	\$0.00
PA-26-P012-009 MARSHALL W. LEE TOWERS	REPLACE WINDOWS 1400 121 021	1460		\$80,000.00	\$0.00	\$0.00	\$0.00
	INSTALL HANDRAILS 1400 121 022	1460		\$10,000.00	\$0.00	\$0.00	\$0.00
	REPLACE INTERIOR LIGHTING 1400 121 023	1460		\$10,000.00	\$0.00	\$0.00	\$0.00
	CLOSET DOORS 1400 121 023A	1460		\$0.00	\$67,325.00	\$67,325.00	\$67,325.00
	EXHAUST VENTILATORS 1400 121 023B	1460		\$0.00	\$4,622.00	\$4,622.00	\$4,622.00
	SUBTOTAL			\$100,000.00	\$71,947.00	\$71,947.00	\$71,947.00
PA-26-P012-011 SIDNEY POLLOCK HOUSE	UPGRADE ELEVATOR EQUIPMENT 1400 121 024	1460		\$50,000.00	\$0.00	\$0.00	\$0.00
	REPLACE KITCHEN COUNTERTOPS 1400 121 025	1460		\$25,000.00	\$0.00	\$0.00	\$0.00
	SUBTOTAL			\$75,000.00	\$0.00	\$0.00	\$0.00
MCHA	REHAB	1470		\$0.00	\$434,881.00	\$434,881.00	\$434,881.00

RESOURCE CENTER	1400 121 025A					
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Annual Statement / Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY	Grant Type and Number Capital Fund Program Grant No: 2001 Replacement Housing Factor Grant No:	Federal FY of Grant 2001
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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
HA-WIDE	OPERATIONS: AS OUTLINED UNDER SECTION 519-PUBLIC HOUSING CAPITAL AND OPERATING FUNDS, BEGINNING IN 2000, PHAs WITH 250 OR MORE UNITS CAN USE UP TO 20% OF THEIR CAPITAL FUND ALLOCATION FOR OPERATING FUND ACTIVITIES 1400 121 026	1406		\$207,655.00	\$207,655.00	\$207,655.00	\$207,655.00
HA-WIDE	MANAGEMENT IMPROVEMENTS: FUNDS TO RMC'S TO BE USED TOWARDS RESIDENT INITIATIVES, SUCH AS JOB TRAINING,COUNSELING & TECHNICAL SUPPORT, RESIDENT PROGRAMS & SERVICES, WHICH INCLUDE DIRECT SOCIAL SERVICES & SUMMER YOUTH CAMP WHICH CONTAINS DRUG PREVENTION, ELIMINATION & JOB TRAINING COMPONENTS 1400 121 027	1408		\$6,050.00	\$5,030.00	\$5,030.00	\$5,030.00
	PUBLIC HOUSING COMPUTER SOFTWARE, TRAINING & TECHNICAL SUPPORT 1400 121 028	1408		\$75,000.00	\$46,730.00	\$46,730.00	\$46,730.00

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

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY	Grant Type and Number Capital Fund Program Grant No: 2001 Replacement Housing Factor Grant No:	Federal FY of Grant 2001
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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
HA-WIDE	APPLICANT/RESIDENT SCREENING SERVICES: CRIMINAL AND CREDIT HISTORY SEARCHES, TRAINING RESIDENT SELECTION COMMITTEES, HIRING OF INVESTIGATORS TO INVESTIGATE DRUG-RELATED CRIME & OTHER CRIMINAL ACTIVITIES, ETC 1400 121 029	1408		\$10,000.00	\$1,632.00	\$1,632.00	\$1,632.00
	SUBTOTAL			\$91,050.00	\$53,392.00	\$53,392.00	\$53,392.00
HA-WIDE	ADMINISTRATION: TO IMPROVE OVERALL OPERATIONS, MAINTAIN HIGH PHMAP SCORES, INCREASE RENT COLLECTIONS, INCREASE UNIT TURNAROUND, HELP PRESERVE REHABILITATED UNITS & SITES, ETC., AND FOR ENVIRONMENTAL REVIEW COSTS 1400 121 030	1410		\$105,000.00	\$105,024.00	\$105,024.00	\$105,024.00
HA-WIDE	FEES & COSTS ARCHITECT & ENGINEERING FEES 1400 121 031	1430		\$50,000.00	\$22,334.00	\$22,334.00	\$22,334.00

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

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY	Grant Type and Number Capital Fund Program Grant No: 2001 Replacement Housing Factor Grant No:	Federal FY of Gra 2001
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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
HA-WIDE	NON-DWELLING EQUIPMENT: COMPUTER & STAFF OFFICE EQUIPMENT: TO IMPROVE OVERALL OPERATIONS, MAINTAIN HIGH PHMAP SCORES, INCREASE RENT COLLECTIONS, INCREASE UNIT TURNAROUND, HELP PRESERVE REHABILITATED UNITS & SITES, ETC.						
	PERSONAL COMPUTERS 1400 121 032	1475		\$25,000.00	\$67,445.00	\$67,445.00	\$67,445.00
	PRINTERS 1400 121 033	1475		\$4,500.00	\$0.00	\$0.00	\$0.00
	SUBTOTAL			\$29,500.00	\$67,445.00	\$67,445.00	\$67,445.00
	GRAND TOTAL			\$1,050,248.00	\$1,050,248.00	\$1,050,248.00	\$1,050,248.00

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06/30/03

int:

Status of Work

IN PROCESS, BALANCE
TO FUTURE CF
TRANSFER TO FUTURE CF

IN PROCESS, BALANCE
TO FUTURE CF
TRANSFER TO FUTURE CF

COMPLETED IN PREVIOUS CG

IN PROCESS, BALANCE
TO FUTURE CF

COMPLETED

TRANSFER TO FUTURE CF

int:

Status of Work

TRANSFER TO FUTURE CF

COMPLETED

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

COMPLETED
CF2001 YR5

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

IN PROCESS, BALANCE
TO FUTURE CF

int:

Status of Work

COMPLETED IN PREVIOUS CG

COMPLETED IN PREVIOUS CG

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

IN PROCESS, BALANCE TO
FUTURE CF; CG706 YR1

COMPLETED
CF2001 YR2

TRANSFER TO FUTURE CF

TRANSFER TO FUTURE CF

IN PROCESS, BALANCE

TO FUTURE CF

int:

Status of Work

COMPLETED

COMPLETED

COMPLETED

int:

Status of Work

COMPLETED

COMPLETED

COMPLETED

int:

Status of Work

COMPLETED

COMPLETED



Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

06/30/03

Part III: Implementation Schedule (CF2001)

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PA-26-P012-002							
SITE IMPROVEMENT 1400 121 001	03/31/03		10/31/02	09/30/04			IN PROCESS, BALANCE TO FUTURE CF
REPLACE FENCING 1400 121 002	03/31/03			09/30/04			TRANSFER TO FUTURE CF
REPLACE SIDEWALKS & 1400 121 003	03/31/03		07/13/02	09/30/04			IN PROCESS, BALANCE TO FUTURE CF
INSTALL & REPLACE HOT WATER HEATERS 1400 121 004	03/31/03			09/30/04			TRANSFER TO FUTURE CF
STUCCO MAINTENANCE SHOP 1400 121 005	03/31/03			09/30/04			COMPLETED IN PREVIOUS CG
UNIT REHAB 1400 121 005A		12/31/02	12/31/02				IN PROCESS, BALANCE TO FUTURE CF
PA-26-P012-003							
UPGRADE LAUNDRY FACILITIES 1400 121 006	03/31/03		07/31/02	09/30/04		06/30/03	COMPLETED
REPLACE SIDEWALKS 1400 121 007	03/31/03			09/30/04			TRANSFER TO FUTURE CF

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

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PA-26-P012-004							
MASONRY TRASH STORAGE AREA 1400 121 008	03/31/03			09/30/04			TRANSFER TO FUTURE CF
RESURFACE AND PAINT BASKETBALL COURT 1400 121 009	03/31/03		08/31/02	09/30/04		08/31/02	COMPLETED
UNDERGROUND HOT/DOMESTIC WATER LINES 1400 121 010	03/31/03			09/30/04			TRANSFER TO FUTURE CF
INSTALL MARVEL FITTINGS ON KITCHEN/BATH LINES 1400 121 011	03/31/03			09/30/04			TRANSFER TO FUTURE CF
MODERNIZE BATHROOM VANITIES 1400 121 012	03/31/03			09/30/04			TRANSFER TO FUTURE CF
BASKETBALL COURT POLES 1400 121 012A		06/30/02	06/30/02		06/30/02	06/30/02	COMPLETED
PA-26-P012-005							
REPLACE SIDEWALKS 1400 121 013	03/31/03			09/30/04			TRANSFER TO FUTURE CF
REPLACE VINYL TILE FLOORS 1400 121 014	03/31/03			09/30/04			TRANSFER TO FUTURE CF
REPLACE INTERIOR DOORS 1400 121 015	03/31/03			09/30/04			TRANSFER TO FUTURE CF

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

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
<u>PA-26-P012-006</u> REPLACE HALLWAY/FIRST FLOOR CARPET 1400 121 016	03/31/03			09/30/04			TRANSFER TO FUTURE CF
INSTALL HVAC BLOWER CABINET 1400 121 017	03/31/03		04/30/02	09/30/04			IN PROCESS, BALANCE TO FUTURE CF
<u>PA-26-P012-007</u> REPLACE WINDOWS 1400 121 018	03/31/03			09/30/04			COMPLETED IN PREVIOUS CG
UPGRADE ELEVATOR EQUIPMENT 1400 121 019	03/31/03			09/30/04			COMPLETED IN PREVIOUS CG
<u>PA-26-P012-008</u> MINOR REHAB 1400 121 020	03/31/03			09/30/04			TRANSFER TO FUTURE CF
<u>PA-26-P012-009</u> REPLACE WINDOWS 1400 121 021	03/31/03			09/30/04			TRANSFER TO FUTURE CF
INSTALL HANDRAILS 1400 121 022	03/31/03			09/30/04			TRANSFER TO FUTURE CF
REPLACE INTERIOR LIGHTING 1400 121 023	03/31/03			09/30/04			TRANSFER TO FUTURE CF
CLOSET DOORS 1400 121 023A		07/31/02	07/31/02				IN PROCESS, TRANSFER TO FUTURE CF
EXHAUST FANS 1400 121 023B		11/30/02	11/30/02		12/31/02	12/31/02	COMPLETED

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
<u>PA-26-P012-011</u> UPGRADE ELEVATOR EQUIPMENT 1400 121 024	03/31/03			09/30/04			TRANSFER TO FUTURE CF
REPLACE KITCHEN COUNTERTOPS 1400 121 025	03/31/03			09/30/04			TRANSFER TO FUTURE CF
<u>MCHA</u> <u>RESOURCE</u> <u>CENTER</u> REHAB 1400 121 025A		03/31/03	03/31/03				IN PROCESS, BALANCE TO FUTURE CF

Annual Statement / Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: 2002 Replacement Housing Factor Grant No:			Federal FY of Grant: 2002
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disaster/Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:)					
<input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending:06/30/03 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds	\$0.00	\$0.00	\$0.00	\$0.00
2	1406 Operations	\$198,043.00	\$198,043.00	\$198,042.00	\$198,042.00
3	1408 Management Improvements	\$55,000.00	\$55,000.00	\$4,990.00	\$4,990.00
4	1410 Administration	\$99,021.00	\$99,021.00	\$108,654.00	\$108,654.00
5	1411 Audit	\$0.00	\$0.00	\$0.00	\$0.00
6	1415 Liquidated Damages	\$0.00	\$0.00	\$0.00	\$0.00
7	1430 Fees and Costs	\$75,000.00	\$75,000.00	\$3,883.00	\$3,883.00
8	1440 Site Acquisition	\$0.00	\$0.00	\$0.00	\$0.00
9	1450 Site Improvement	\$30,000.00	\$30,000.00	\$1,500.00	\$1,500.00
10	1460 Dwelling Structures	\$187,600.00	\$187,600.00	\$4,744.00	\$4,744.00
11	1465.1 Dwelling Equipment-Nonexpendable	\$25,000.00	\$25,000.00	\$0.00	\$0.00
12	1470 Nondwelling Structures	\$288,549.00	\$288,549.00	\$287,594.00	\$287,594.00
13	1475 Nondwelling Equipment	\$32,000.00	\$32,000.00	\$16,058.00	\$16,058.00
14	1485 Demolition	\$0.00	\$0.00	\$0.00	\$0.00
15	1490 Replacement Reserve	\$0.00	\$0.00	\$0.00	\$0.00
16	1492 Moving to Work Demonstration	\$0.00	\$0.00	\$0.00	\$0.00
17	1495.1 Relocation Costs	\$0.00	\$0.00	\$0.00	\$0.00
18	1499 Development Activities	\$0.00	\$0.00	\$0.00	\$0.00
19	1501 Collateralization or Debt Service	\$0.00	\$0.00	\$0.00	\$0.00
20	1502 Contingency (may not exceed 8% of line 19)	\$0.00	\$0.00	\$0.00	\$0.00
21	Amount of Annual Grant (Sum of lines 2-20)	\$990,213.00	\$990,213.00	\$625,465.00	\$625,465.00
22	Amount of Line 21 Related to LBP Activities	\$0.00	\$0.00	\$0.00	\$0.00
23	Amount of Line 21 Related to Section 504 Compliance	\$138,000.00	\$138,000.00	\$0.00	\$0.00
24	Amount of Line 21 Related to Security - Soft Costs	\$0.00	\$0.00	\$0.00	\$0.00
25	Amount of Line 21 Related to Security - Hard Costs	\$6,000.00	\$6,000.00	\$0.00	\$0.00
26	Amount of Line 21 Related to Energy Conservation Measures	\$132,000.00	\$132,000.00	\$0.00	\$0.00

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: 2002 Replacement Housing Factor Grant No:				Federal FY of Gra 2002	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
PA-26-P012-002 BRIGHT HOPE ESTATES	REPLACE PORCH PADS 1400 122 001	1450	90 units	\$15,000.00	\$15,000.00	\$0.00	\$0.00
	CLEAN EXTERIOR BUILDINGS 1400 122 002	1460	18 bldgs	\$15,000.00	\$10,256.00	\$0.00	\$0.00
	CLEAN HEATING DUCTS 1400 122 003	1460	100 units	\$12,000.00	\$12,000.00	\$0.00	\$0.00
	MODERNIZE COMMUNITY LAUNDRY FACILITY/MARKET 1400 122 004	1470	1 bldg	\$15,000.00	\$15,000.00	\$0.00	\$0.00
	SUBTOTAL			\$57,000.00	\$52,256.00	\$0.00	\$0.00
PA-26-P012-003 BRIGHT HOPE MANOR	RESEED LAWNS 1400 122 005	1450	20 units	\$2,000.00	\$2,000.00	\$1,500.00	\$1,500.00
	CLEAN HEATING DUCTS 1400 122 006	1460	78 units	\$8,000.00	\$8,000.00	\$0.00	\$0.00
	REPLACE CONCRETE PAD EXTERIOR AND COMMUNITY BUILDING 1400 122 007	1450	1,225 sf	\$8,000.00	\$8,000.00	\$0.00	\$0.00
	REPLACE FENCE AND GATES 1400 122 008	1470	44 lf	\$6,000.00	\$6,000.00	\$0.00	\$0.00
	MODERNIZE COMMUNITY LAUNDRY FACILITY MARKET 1400 122 009	1470	1 bldg	\$15,000.00	\$15,000.00	\$0.00	\$0.00
	SUBTOTAL			\$39,000.00	\$39,000.00	\$1,500.00	\$1,500.00
PA-26-P012-004 NORTH HILLS MANOR	INSTALL GAS FIRED BOILERS 1400 122 010	1460	7	\$30,000.00	\$30,000.00	\$0.00	\$0.00
	INSTALL HOT WATER HEATERS 1400 122 011	1460	7	\$27,000.00	\$27,000.00	\$0.00	\$0.00
	SITE IMPROVEMENTS 1400 122 012	1450	L.S.	\$5,000.00	\$5,000.00	\$0.00	\$0.00
	SUBTOTAL			\$62,000.00	\$62,000.00	\$0.00	\$0.00

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: 2002 Replacement Housing Factor Grant No:				Federal FY of Gra 2002	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
PA-26-P012-005 CREST MANOR	INSTALL BEDROOM CLOSET DOORS 1400 122 013	1460	36 units	\$31,000.00	\$31,000.00	\$0.00	\$0.00
	INTERIOR LIGHTING 1400 122 014	1460	36 units	\$20,000.00	\$20,000.00	\$0.00	\$0.00
	REPLACE INTERIOR DOORS 1400 121 015	1460	18 units	\$10,000.00	\$10,000.00	\$0.00	\$0.00
	SUBTOTAL			\$61,000.00	\$61,000.00	\$0.00	\$0.00
PA-26-P012-006 GOLDEN AGE MANOR	SPRING HINGES/LATCHES ON DOORS 1400 122 017	1460	85 units	\$5,400.00	\$5,400.00	\$0.00	\$0.00
	AIR CONDITIONING IN COMM ROOM 1400 122 017A	1460		\$0.00	\$4,744.00	\$4,744.00	\$4,744.00
	SUBTOTAL			\$5,400.00	\$10,144.00	\$4,744.00	\$4,744.00
PA-26-P012-007 ROBERT P. SMITH TOWERS	SPRING HINGES/LATCHES ON DOORS 1400 122 018	1460	80 units	\$7,200.00	\$7,200.00	\$0.00	\$0.00
	SUBTOTAL			\$7,200.00	\$7,200.00	\$0.00	\$0.00
PA-26-P012-008 SCATTERED SITES	MINOR REHAB 1400 122 019	1460	1 unit	\$5,000.00	\$5,000.00	\$0.00	\$0.00
	SUBTOTAL			\$5,000.00	\$5,000.00	\$0.00	\$0.00
PA-26-P012-009 MARSHALL W. LEE TOWERS	REPLACE 1ST FLOOR TILE/COVE BASE 1400 122 020	1460	2,936sf 385 lf	\$15,000.00	\$15,000.00	\$0.00	\$0.00
	COMMUNITY ROOM CHAIRS 1400 122 021	1460	80	\$2,000.00	\$2,000.00	\$0.00	\$0.00
	SUBTOTAL			\$17,000.00	\$17,000.00	\$0.00	\$0.00
PA-26-P012-011 SIDNEY POLLOCK HOUSE	RANGES AND RANGE HOODS 1400 122 022	1465.1	100	\$25,000.00	\$25,000.00	\$0.00	\$0.00
	SUBTOTAL			\$25,000.00	\$25,000.00	\$0.00	\$0.00

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: 2002 Replacement Housing Factor Grant No:				Federal FY of Gra 2002	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
HA-WIDE	SUBSTANTIAL REHABILITATION OF MCHA RESOURCES CENTER 1400 122 023	1470	1bldg	\$220,549.00	\$220,549.00	\$253,699.00	\$253,699.00
	NEW PARTITION WALLS 1400 122 024	1470	L.S.	\$32,000.00	\$32,000.00	\$33,895.00	\$33,895.00
	SUBTOTAL			\$252,549.00	\$252,549.00	\$287,594.00	\$287,594.00
HA-WIDE	OPERATIONS: AS OUTLINED UNDER SECTION 519- PUBLIC HOUSING CAPITAL AND OPERATING FUNDS, BEGINNING IN 2000, PHAs WITH 250 OR MORE UNITS CAN USE UP TO 20% OF THEIR CAPITAL FUND ALLOCATION FOR OPERATING FUND ACTIVITIES 1400 122 025	1406		\$198,043.00	\$198,043.00	\$198,042.00	\$198,042.00
HA-WIDE	MANAGEMENT IMPROVEMENTS: PUBLIC HOUSING COMPUTER SOFTWARE, TRAINING & TECHNICAL SUPPORT 1400 122 026	1408		\$45,000.00	\$45,000.00	\$4,990.00	\$4,990.00
	APPLICANT/RESIDENT SCREENING SERVICES: CRIMINAL AND CREDIT HISTORY SEARCHES, TRAINING RESIDENT SELECTION COMMITTEES, HIRING OF INVESTIGATORS TO INVESTIGATE DRUG-RELATED CRIME & OTHER CRIMINAL ACTIVITIES, ETC 1400 122 027	1408		\$10,000.00	\$10,000.00	\$0.00	\$0.00
	SUBTOTAL			\$55,000.00	\$55,000.00	\$4,990.00	\$4,990.00

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: MONTGOMERY COUNTY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: 2002 Replacement Housing Factor Grant No:				Federal FY of Gra 2002	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
HA-WIDE	ADMINISTRATION: TO IMPROVE OVERALL OPERATIONS, MAINTAIN HIGH PHMAP SCORES, INCREASE RENT COLLECTIONS, INCREASE UNIT TURNAROUND, HELP PRESERVE REHABILITATED UNITS & SITES, ETC., AND FOR ENVIRONMENTAL REVIEW COSTS 1400 122 028	1410		\$99,021.00	\$99,021.00	\$108,654.00	\$108,654.00
HA-WIDE	FEES & COSTS: ARCHITECT & ENGINEERING FEES 1400 122 029	1430		\$75,000.00	\$75,000.00	\$3,883.00	\$3,883.00
HA-WIDE	NON-DWELLING EQUIPMENT: COMPUTER & STAFF OFFICE EQUIPMENT: TO IMPROVE OVERALL OPERATIONS, MAINTAIN HIGH PHMAP SCORES, INCREASE RENT COLLECTIONS, INCREASE UNIT TURNAROUND, HELP PRESERVE REHABILITATED UNITS & SITES, ETC.						
	PERSONAL COMPUTERS 1400 122 030	1475	3	\$7,500.00	\$7,500.00	\$9,760.00	\$9,760.00
	PRINTERS 1400 122 031	1475	3	\$4,500.00	\$4,500.00	\$0.00	\$0.00
	STAFF OFFICE EQUIP: TYPWRITERS, FAX, COPIER, ETC. 1400 122 032	1475	L.S.	\$20,000.00	\$20,000.00	\$6,298.00	\$6,298.00
	SUBTOTAL			\$32,000.00	\$32,000.00	\$16,058.00	\$16,058.00
	GRAND TOTAL			\$990,213.00	\$990,213.00	\$625,465.00	\$625,465.00

06/30/03

int:

Status of Work

PENDING

PENDING

PENDING

PENDING

IN PROCESS

PENDING

PENDING

PENDING

PENDING

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int:

Status of Work

PENDING

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COMPLETED
CF2002 4TH YEAR

PENDING

PENDING

PENDING

PENDING

PENDING

int:

Status of Work

IN PROCESS

COMPLETED

IN PROCESS

IN PROCESS

PENDING

int:

Status of Work

IN PROCESS

IN PROCESS

IN PROCESS

PENDING

IN PROCESS

Annual Statement / Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part III: Implementation Schedule (CF2002)

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
<u>PA-26-P012-002</u> REPLACE PORCH PADS 1400 122 001	03/31/04			09/30/05			PENDING
CLEAN EXTERIOR BUILDINGS 1400 122 002	03/31/04			09/30/05			PENDING
CLEAN HEATING DUCTS 1400 122 003	03/31/04			09/30/05			PENDING
MODERNIZE COMMUNITY LAUNDRY FACILITY/MARKET 1400 122 004	03/31/04			09/30/05			PENDING
<u>PA-26-P012-003</u> RESEED LAWNS 1400 122 005	03/31/04			09/30/05			IN PROCESS
CLEAN HEATING DUCTS 1400 122 006	03/31/04			09/30/05			PENDING
REPLACE CONCRETE PAD EXTERIOR & COMMUNITY BLDG 1400 122 007	03/31/04			09/30/05			PENDING
REPLACE FENCE AND GATES 1400 122 008	03/31/04			09/30/05			PENDING
MODERNIZE COMMUNITY LAUNDRY FACILITY/MARKET 1400 122 009	03/31/04			09/30/05			PENDING

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
<u>PA-26-P012-004</u> INSTALL GAS FIRED BOILERS 1400 122 010	03/31/03			09/30/04			PENDING
INSTALL HOT WATER HEATERS 1400 122 011	03/31/03			09/30/04			PENDING
SITE IMPROVEMENTS 1400 122 012	03/31/03			09/30/04			PENDING
<u>PA-26-P012-005</u> INSTALL BEDROOM CLOSET DOORS 1400 122 013	03/31/03			09/30/04			PENDING
INTERIOR LIGHTING 1400 122 014	03/31/03			09/30/04			PENDING
REPLACE INTERIOR DOORS 1400 122 015	03/31/03			09/30/04			PENDING
<u>PA-26-P012-006</u> SPRING HINGES & LATCHES ON DOORS 1400 122 017	03/31/03			09/30/04			PENDING
A/C IN COMMUNITY RM 1400 122 017A		07/31/02	07/31/02		10/31/02	10/31/02	COMPLETED

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
<u>PA-26-P012-007</u> SPRING HINGES & LATCHES ON DOORS 1400 122 018	03/31/03			09/30/04			PENDING
<u>PA-26-P012-008</u> MINOR REHABILITATION 1400 122 019	03/31/03			09/30/04			PENDING
<u>PA-26-P012-009</u> REPLACE 1ST FLOOR TILE & COVE BASE 1400 122 020	03/31/03			09/30/04			PENDING
COMMUNITY ROOM CHAIRS 1400 122 021	03/31/03			09/30/04			PENDING
<u>PA-26-P012-011</u> RANGES & RANGE HOODS 1400 122 022	03/31/03			09/30/04			PENDING
<u>HA-WIDE MCHA RESOURCE CENTER</u> SUBSTANTIAL REHAB 1400 122 023	03/31/03	12/31/01	12/31/01	09/30/04			IN PROCESS
PARTITION WALLS 1400 122 024	03/31/03	08/31/02	08/31/02	09/30/04	12/31/02	12/31/02	COMPLETED

Capital Fund Program Five-Year Action Plan

Part I: Summary

PHA Name: Montgomery County Housing Authority		<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:			
Development Number/Name/HA- Wide	Year 1 2004	Work Statement for Year 2 FFY Grant: 2005 PHA FY: 2005	Work Statement for Year 3 FFY Grant: 2006 PHA FY: 2006	Work Statement for Year 4 FFY Grant: 2007 PHA FY: 2007	Work Statement for Year 5 FFY Grant: 2008 PHA FY: 2008
	Annual Statement				
PA-12-2		\$85,000.00	\$100,000.00	\$22,000.00	\$30,000.00
PA-12-3		\$4,500.00	\$46,000.00	\$68,000.00	\$73,200.00
PA-12-4		\$33,000.00	\$35,500.00	\$123,000.00	\$70,000.00
PA-12-5		\$33,000.00	\$60,000.00	\$10,000.00	\$70,000.00
PA-12-6		\$77,696.00	\$70,600.00	\$90,624.00	\$20,000.00
PA-12-7		\$50,253.00	\$35,000.00	\$18,600.00	\$28,500.00
PA-12-8		\$5,000.00	\$5,000.00	\$5,000.00	\$4,126.00
PA-12-9		\$67,000.00	\$21,500.00	\$8,400.00	\$30,000.00
PA-12-11		\$40,000.00	\$42,519.00	\$70,000.00	\$111,672.00
HA-Wide					
Non-Dwelling Structures		\$73,520.00	\$50,000.00	\$50,000.00	\$5,000.00
Non-Dwelling Equipment		\$26,547.00	\$26,547.00	\$26,547.00	\$49,673.00
Fees & Costs		\$21,655.00	\$24,505.00	\$25,000.00	\$25,000.00
Operations		\$163,477.00	\$163,477.00	\$163,477.00	\$163,477.00
Management Improvements		\$55,000.00	\$55,000.00	\$55,000.00	\$55,000.00
Administration		\$81,739.00	\$81,739.00	\$81,739.00	\$81,739.00
CFP Funds Listed for 5-year planning		\$817,387.00	\$817,387.00	\$817,387.00	\$817,387.00
Replacement Housing Factor Funds					

Capital Fund Program Five-Year Action Plan
Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: <u>2005</u> FFY Grant: 2005 PHA FY: 2005			Activities for Year: <u>2006</u> FFY Grant: 2006 PHA FY: 2006		
2004	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	PA-12-2 Bright Hope Estates	Replace Gas Lines	\$35,000.00	PA-12-2 Bright Hope Estates	Replace hot air furnaces	\$30,000.00
Annual	“	Replace Chimneys	\$50,000.00	“	Replace storm doors	\$50,000.00
Statement		Subtotal	\$85,000.00	“	Replace gas ranges	\$10,000.00
				“	Replace refrigerators	\$10,000.00
					Subtotal	\$100,000.00
	PA-12-3 Bright Hope Manor	Resurface & paint basketball court	\$4,500.00	PA-12-3 Bright Hope Manor	Seal coat macadam trash areas	\$6,000.00
		Subtotal	\$4,500.00	“	Replace storm doors	\$20,000.00
				“	Replace refrigerators	\$10,000.00
				“	Replace ranges	\$10,000.00
					Subtotal	\$46,000.00
	PA-12-4 North Hills Manor	Replace refrigerators	\$10,000.00	PA-12-4 North Hills Manor	Remove exhaust fan grills from exterior, cover openings	\$6,500.00
		Waterproof & Finish Admin. Bldg. Basement	\$5,000.00	“	Top coat, seal and reline parking areas	\$6,500.00
		Install gas shutoff valves	\$10,000.00	“	Install front & rear frost proof faucets	\$10,000.00
		Replace 100 clothes poles	\$8,000.00	“	Install flagpole	\$2,500.00
		Subtotal	\$33,000.00	“	Replace poles, backboards, etc., on basketball court	\$10,000.00
					Subtotal	\$35,500.00

Total CFP Estimated Cost	\$122,500.00			\$181,500.00
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Capital Fund Program Five-Year Action Plan
Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: <u>2005</u> FFY Grant: 2005 PHA FY: 2005			Activities for Year: <u>2006</u> FFY Grant: 2006 PHA FY: 2006		
2004	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	PA-12-5 Crest Manor	New Electrical Service (Pospect Avenue)	\$15,000.00	PA-12-5 Crest Manor	Upgrade bathrooms	\$40,000.00
Annual	“	Remove existing lighting from poles	\$2,000.00	“	Install rear frost proof faucets	\$10,000.00
Statement	“	Remove sewer lateral	\$10,000.00	“	Topsoil, seeding, and landscaping	\$10,000.00
		Replace 80 clothes poles	\$6,000.00		Subtotal	\$60,000.00
		Subtotal	\$33,000.00			
				PA-12-6 Golden Age Manor	Upgrade fire alarm systems	\$5,000.00
	PA-12-6 Golden Age Manor	Replace sidewalks, concrete & railing at Boiler Room ramp	\$6,500.00	“	Replace main electrical panels on first floor	\$8,600.00
	“	Waterproof exterior of bldg.	\$20,000.00	“	Replace generator and upgrade system	\$5,000.00
	“	Replace downspouts	\$3,000.00	“	Remove kitchen roof vents	\$20,000.00
	“	Install A/C in community & pool rooms	\$10,000.00	“	Replace kitchen lighting	\$15,600.00
	“	Replace waste stacks & bathroom drain lines	\$38,196.00	“	Replace floor tile in community, laundry & pool rooms	\$10,000.00
		Subtotal	\$77,696.00	“	Replace handrails (Walnut St. stairs)	\$1,400.00
				“	Replace drapes on first floor	\$5,000.00
					Subtotal	\$70,600.00
		Total CFP Estimated Cost	\$110,696.00			\$130,600.00

Capital Fund Program Five-Year Action Plan
Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: <u>2005</u> FFY Grant: 2005 PHA FY: 2005			Activities for Year: <u>2006</u> FFY Grant: 2006 PHA FY: 2006		
2003	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	PA-12-7 Robert P. Smith Towers	Remodel bathrooms	\$40,000.00	PA-12-7 Robert P. Smith Towers	Waterproof, caulk, grout, & replace or repair deteriorating concrete window sills/lintels	\$30,000.00
Annual	“	Waterproof exterior of building	\$10,253.00	“	Replace drapes on first floor	\$5,000.00
Statement		Subtotal	\$50,253.00		Subtotal	\$35,000.00
	PA-12-8 Scattered Sites	Minor Rehabilitation	\$5,000.00	PA-12-8 Scattered Sites	Minor Rehabilitation	\$5,000.00
		Subtotal	\$5,000.00		Subtotal	\$5,000.00
	PA-12-9 Marshall W. Lee Towers	Waterproof exterior of bldg.	\$8,000.00	PA-12-9 Marshall W. Lee Towers	Upgrade fire alarm system (smoke detectors)	\$10,000.00
	“	Replace riser ball valves	\$25,000.00	“	Install magnetic releases on community and laundry room doors	\$2,500.00
	“	Renovate compactor	\$4,000.00	“	Seal and line parking lot	\$4,000.00
		Remodel bathrooms	\$30,000.00	“	Replace electrical panel on first floor	\$5,000.00
		Subtotal	\$67,000.00		Subtotal	\$21,500.00
	PA-12-11 Sidney Pollock House	Remodel bathrooms	\$25,000.00	PA-12-11 Sidney Pollock House	Replace sidewalk and curbing	\$38,519.00
	“	Waterproof exterior of building	\$15,000.00	“	Install fencing (outside sitting area)	\$4,000.00
		Subtotal	\$40,000.00		Subtotal	\$42,519.00
		Total CFP Estimated Cost	\$162,253.00			\$104,019.00

Capital Fund Program Five-Year Action Plan
Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: <u>2005</u> FFY Grant: 2005 PHA FY: 2005			Activities for Year: <u>2006</u> FFY Grant: 2006 PHA FY: 2006		
2004	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	HA Wide Non-Dwelling Structures Cherry Court	Roof, HVAC system, water service, windows, plumbing, electric, etc.	\$43,520.00	HA-Wide Non-Dwelling Structures Cherry Court	Roof, HVAC system, water service, windows, plumbing, electric, etc.	\$50,000.00
Annual	Parking Lot at 453 & 455 High Street	Landscaping	\$30,000.00		Subtotal	\$50,000.00
Statement		Subtotal	\$73,520.00			
	Total CFP Estimated Cost		\$73,520.00			\$50,000.00

Capital Fund Program Five-Year Action Plan
Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: <u>2005</u> FFY Grant: 2005 PHA FY: 2005			Activities for Year: <u>2006</u> FFY Grant: 2006 PHA FY: 2006		
2004	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	HA-Wide Non-Dwelling Equipment	Computer equipment including personal computers & printers	\$26,547.00	HA-Wide Non-Dwelling Equipment	Computer equipment including personal computers & printers	\$26,547.00
		Subtotal	\$26,547.00		Subtotal	\$26,547.00
	HA-Wide Fees & Costs	Architects & Engineers	\$21,655.00	HA-Wide Fees & Costs	Architects & Engineers	\$24,505.00
Annual		Subtotal	\$21,655.00		Subtotal	\$24,505.00
Statement	HA-Wide Management Improvements	Public housing computer software training & technical support	\$45,000.00	HA-Wide Management Improvements	Public Housing computer software training & technical support	\$45,000.00
	“	Applicant/resident screening services: Criminal and credit history searches, training resident selection committees, hiring of investigators to investigate drug-related crime and other criminal activities	\$10,000.00	“	Applicant/resident screening services: Criminal and credit history searches, training resident selection committees, hiring of investigators to investigate drug-related crime and other criminal activities	\$10,000.00
		Subtotal	\$55,000.00		Subtotal	\$55,000.00
Total CFP Estimated Cost			\$103,202.00			
				\$106,052.00		

**Capital Fund Program Five-Year Action Plan
Part II: Supporting Pages—Work Activities**

Activities for Year 1	Activities for Year: <u>2007</u> FFY Grant: 2007 PHA FY: 2007			Activities for Year: <u>2008</u> FFY Grant: 2008 PHA FY: 2008		
2004	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	PA-12-2 Bright Hope Estates	Paint 202 exterior metal entrance doors	\$15,000.00	PA-12-2 Bright Hope Estates	Replace water heaters	\$10,000.00
Annual	“	Replace exterior hose bibs	\$7,000.00	“	Clean heat ducts	\$9,000.00
Statement		Subtotal	\$22,000.00	“	Trim trees	\$5,000.00
				“	Replace clothes poles	\$6,000.00
					Subtotal	\$30,000.00
	PA-12-3 Bright Hope Manor	Replace 26 exterior hose bibs	\$5,000.00	PA-12-3 Bright Hope Manor	Clean heat ducts	\$9,000.00
	“	Replace soffits under porch roofs	\$40,000.00	“	Replace hot air heaters	\$39,000.00
	“	Replace bathroom & kitchen faucets	\$23,000.00	“	Install gutter guards	\$8,000.00
		Subtotal	\$68,000.00	“	Trim trees	\$5,000.00
				“	Seal parking lot and reline	\$4,000.00
				“	Replace clothes poles	\$5,000.00
				“	Replace office carpet	\$3,200.00
					Subtotal	\$73,200.00
	Total CFP Estimated Cost		\$90,000.00			\$103,200.00

Capital Fund Program Five -Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: <u>2007</u> FFY Grant: 2007 PHA FY: 2007			Activities for Year: <u>2008</u> FFY Grant: 2008 PHA FY: 2008		
2004	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	PA-12-4 North Hills Manor	Replace & relocate boiler in Admin. Bldg.	\$5,500.00	PA-12-4 North Hills Manor	Repair brick wall on Walnut Ave.	\$5,000.00
Annual	“	Topcoat & reline basketball court	\$5,000.00	“	Replace roofs	\$10,000.00
Statement	“	Remove Admin. Bldg. Chimney	\$10,000.00	“	Trim trees	\$5,000.00
	“	Replace gas ranges & install receptacles	\$24,000.00	“	Install gutter guards	\$5,000.00
	“	Replace kitchen faucets	\$7,500.00	“	Replace sidewalks, steps, & porch pads	\$45,000.00
	“	Replace windows	\$50,000.00	“	Subtotal	\$70,000.00
	“	Install vanities, tops & faucets	\$21,000.00			
		Subtotal	\$123,000.00			
				PA-12-5 Crest Manor	Install cleanouts for sewer lines in front of units	\$15,000.00
	PA-12-5 Crest Manor	Replace exterior doors on office bldg.	\$10,000.00	“	Trim Trees	\$5,000.00
		Subtotal	\$10,000.00	“	Install gutter guards	\$5,000.00
				“	Replace sidewalks, steps & porch pads	\$45,000.00
					Subtotal	\$70,000.00
		Total CFP Estimated Cost	\$133,000.00			\$140,000.00

Capital Fund Program Five-Year Action Plan
Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: <u>2007</u> FFY Grant: 2007 PHA FY: 2007			Activities for Year: <u>2008</u> FFY Grant: 2008 PHA FY: 2008		
2004	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	PA-12-6 Golden Age Manor	Replace transformer	\$25,000.00	PA-12-6 Golden Age Manor	Replace roof ventilator, cap existing not in use	\$5,000.00
Annual	“	Install A/C in corridors	\$65,624.00	“	Replace closet doors	\$5,000.00
Statement		Subtotal	\$90,624.00	“	Replace roof	\$10,000.00
					Subtotal	\$20,000.00
	PA-12-7 Robert P. Smith Towers	Replace interior entrance lights in 72 units	\$10,000.00	PA-12-7 Robert P. Smith Towers	Coat roof and pitch elevator roof	\$3,600.00
	“	Install hallway light fixtures	\$5,000.00	“	Seal and line parking lot	\$2,400.00
	“	Replace unit entry locks	\$3,600.00	“	Upgrade heaters and controls	\$20,000.00
		Subtotal	\$18,600.00	“	Upgrade surveillance equipment	\$2,500.00
					Subtotal	\$28,500.00
	PA-12-8 Scattered Sites	Minor Rehabilitation	\$5,000.00	PA-12-8 Scattered Sites	Minor Rehabilitation	\$4,126.00
		Subtotal	\$5,000.00		Subtotal	\$4,126.00
		Total CFP Estimated Cost	\$114,224.00			\$52,626.00

Capital Fund Program Five -Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: <u>2007</u> FFY Grant: 2007 PHA FY: 2007			Activities for Year: <u>2008</u> FFY Grant: 2008 PHA FY: 2008		
2004	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	PA-12-9 Marshall W. Lee Towers	Replace hallway light fixtures	\$4,800.00	PA-12-9 Marshall W. Lee Towers	Replace boilers & domestic hot water heaters	\$20,000.00
Annual	“	Replace unit entry locks	\$3,600.00		Replace roof	\$10,000.00
Statement		Subtotal	\$8,400.00		Subtotal	\$30,000.00
		Total CFP Estimated Cost	\$8,400.00			\$30,000.00

Capital Fund Program Five -Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: <u>2007</u> FFY Grant: 2007 PHA FY: 2007			Activities for Year: <u>2008</u> FFY Grant: 2008 PHA FY: 2008		
2004	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	PA-12-11 Sidney Pollock House	Replace kitchen cabinets	\$70,000.00	PA-12-11 Sidney Pollock House	Upgrade elevators	\$20,000.00
Annual		Subtotal	\$70,000.00	“	Upgrade fire alarm system	\$5,000.00
Statement				“	Resurface and line parking lot	\$5,200.00
				“	Replace shut off valves and install backflow preventer on Pottstown Borough’s domestic water line	\$5,000.00
				“	Replace refrigerators in handicap units	\$3,600.00
				“	Replace tub and shower faucets	\$8,000.00
				“	Coat roof	\$5,000.00
				“	Replace closet doors	\$24,872.00
				“	Replace stoves and range hoods	\$10,000.00
				“	Replace medicine cabinets and vanities	\$10,000.00
				“	Replace hot and cold risers	\$5,000.00
				“	Replace rear entrance door	\$10,000.00
					Subtotal	\$111,672.00
		Total CFP Estimated Cost	\$70,000.00			\$111,672.00

Capital Fund Program Five -Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: <u>2007</u> FFY Grant: 2007 PHA FY: 2007			Activities for Year: <u>2008</u> FFY Grant: 2008 PHA FY: 2008		
2004	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	HA-Wide Non-Dwelling Structures Cherry Court	Roof, HVAC system, water service, windows, plumbing, electric, etc.	\$50,000.00	HA-Wide Non-Dwelling Structures Cherry Court	Seal and line parking lot	\$5,000.00
Annual Statement		Subtotal	\$50,000.00		Subtotal	\$5,000.00
	Total CFP Estimated Cost	\$50,000.00			\$5,000.00	

Capital Fund Program Five -Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: <u>2007</u> FFY Grant: 2007 PHA FY: 2007			Activities for Year: <u>2008</u> FFY Grant: 2008 PHA FY: 2008		
2004	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	HA-Wide Non-Dwelling Equipment	Computer equipment including personal computers & printers	26,547.00	HA-Wide Non-Dwelling Equipment	Computer equipment including personal computers & printers	\$26,547.00
		Subtotal	\$26,547.00		Trucks	\$23,126.00
Annual					Subtotal	\$49,673.00
	HA-Wide Fees & Costs	Architects & Engineers	\$25,000.00	HA-Wide Fees & Costs	Architects & Engineers	\$25,000.00
		Subtotal	\$25,000.00		Subtotal	\$25,000.00
Statement						
	HA-Wide Management Improvements	Public housing computer software training & technical support	\$45,000.00	HA-Wide Management Improvements	Public housing computer software training & technical support	\$45,000.00
	“	Applicant/resident screening services: Criminal and credit history searches, training resident selection committees, hiring of investigators to investigate drug-related crime and other criminal activities	\$10,000.00	“	Applicant/resident screening services: Criminal and credit history searches, training resident selection committees, hiring of investigators to investigate drug-related crime and other criminal activities	\$10,000.00
		Subtotal	\$55,000.00		Subtotal	\$55,000.00
	Total CFP Estimated Cost		\$106,547.00			\$129,673.00

Required Attachment J : Component 10 (B) - Voluntary Conversion Under Section 22

Component 10 (B) Voluntary Conversion Initial Assessments

a. How many of the PHA's developments are subject to the Required Initial Assessments?

Four

b. How many of the PHA's developments are not subject to the Required Initial Assessments based on exemptions (e.g., elderly and/or disabled developments not general occupancy projects)?

Four

c. How many Assessments were conducted for the PHA's covered developments?

Four

d. Identify PHA developments that may be appropriate for conversion based on the Required Initial Assessments:

Development Name	Number of Units
N/A	N/A

e. If the PHA has not completed the Required Initial Assessments, describe the status of these assessments:

Optional Attachment K : Replacement Housing Factor Plan (FY 1999-FY 2008)

MONTGOMERY COUNTY HOUSING AUTHORITY

PAGE 1

1. PROJECT DESCRIPTION:

The Montgomery County Housing Authority (MCHA) proposes to utilize its Replacement Housing Factor Funding (RHFF), (FY 1999 - FY 2008) in conjunction with our Homeownership Development Program, PA26-P012-014 approved by HUD on September 28, 1994.

RHFF will be utilized with leveraged sale proceeds to develop additional Homeownership homes through the approved acquisition with rehabilitation method of development.

A. Number of Units: 5-7 Homes

B. Development Method: Acquisition with Rehabilitation

C. Structure Type: Single Family (Row, Detached/Semi-Detached)

2. SCHEDULE: N/A (Approved Development Program, PA26-P012-014)

3. SOURCE OF FUNDS:

A. Replacement Housing Factor Funds: \$459,511 (Year 1 through 10)

First 5-year increment:

?? FY 1999	\$26,577
?? FY 2000	\$41,261
?? FY 2001	\$51,144
?? FY 2002	\$48,647
?? FY 2003	\$48,647 (Est.)
	Total \$216,276

Second 5-year increment:

?? FY 2004	\$48,647 (Est.)
?? FY 2005	\$48,647 (Est.)
?? FY 2006	\$48,647 (Est.)
?? FY 2007	\$48,647 (Est.)
?? FY 2008	\$48,647 (Est.)
	Total \$243,235

B. Other Funds: (Proceeds from Sales Funds): \$75,000

According to Notice PIH 2003-10 (HA) the MCHA will substantially leverage \$75,000 from our Homeownership Sale Proceeds.

C. Total Funds: **\$534,511**

4. MCHA PLAN STATUS:

The MCHA has not committed any RHFF until final approval from HUD. This proposal will permit the MCHA to acquire and rehabilitate approximately five (5) to seven (7) additional Homeownership units under our PA26-PO12-014 Development Program. This is based upon approximate cost figures of \$75,000 to \$108,000 per unit.

5. OBLIGATION/EXPENDITURE STATUS (FY 1998-2000):

As you know, FY 1998 RHFF were utilized in the modernization of units located in the Bright Hope Community, PA-12-2&3. No other funds have been committed. If the Replacement Housing Factor Plan is approved by HUD, all funds can be committed and expended in a three (3) year period.