

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

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# PHA Plans

5 Year Plan for Fiscal Years 2000 - 2004  
Annual Plan for Fiscal Year 2004 - 2005

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

**PHA Plan  
Agency Identification**

**PHA Name:** Housing Authority of Thurston County

**PHA Number:** WA049

**PHA Fiscal Year Beginning:** 07/2004

**Public Access to Information**

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

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

**Display Locations For PHA Plans and Supporting Documents**

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

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

A Standard Operating Procedures Manual separate from the Administrative Plan is being developed by staff for the Rental Assistance Program. This will be available at the Main Office along with the Administrative Plan.

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

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

**5-YEAR PLAN**  
**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)

The Mission of the Housing Authority of Thurston County is to provide safe, decent, and affordable housing services to persons of low income, disabled and at risk individuals and families. The ultimate goal of the Housing Authority is to assist individuals and families to secure long term permanent housing. (Adopted by the board of Commissioners, October 2003)

**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.

Goals adopted by the Housing Authority's Board of Commissioners in October 2003 are as follows:

- To increase affordable housing opportunities for persons of low income, disabled and at risk individuals and families.
- To create and support efforts which preserve residential areas, promote the rehabilitation of housing, and enhance the development of communities.
- To work in partnership with the community to develop successful programs for emergency, transitional, and permanent housing opportunities for person of low income, disabled and at risk individuals and families in need.

**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:
- Reduce public housing vacancies:
- Leverage private or other public funds to create additional housing opportunities:
- Acquire or build units or developments
- Other (list below)

PHA Goal: Improve the quality of assisted housing

Objectives:

- Improve public housing management: (PHAS score)
- Improve voucher management: (SEMAP score)
- Increase customer satisfaction:
- Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections)
- Renovate or modernize public housing units:
- Demolish or dispose of obsolete public housing:
- Provide replacement public housing:
- Provide replacement vouchers:
- Other: (list below)  
Work with landlords to correct deficiencies to units in a timely manner.

PHA Goal: Increase assisted housing choices

Objectives:

- Provide voucher mobility counseling:
- Conduct outreach efforts to potential voucher landlords
- Increase voucher payment standards
- Implement voucher homeownership program:
- Implement public housing or other homeownership programs:
- Implement public housing site-based waiting lists:
- Convert public housing to vouchers:
- 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:
- Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
- Implement public housing security improvements:

- Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
- 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:
- Provide or attract supportive services to improve assistance recipients' employability:
- Provide or attract supportive services to increase independence for the elderly or families with disabilities.
- Other: (list below)
  1. Staff remains knowledgeable about support services in the community in order to make referrals or to help link individuals with needed resources.
  2. Participate in community consortium of service providers in order to maintain linkages between housing and services.
  3. Develop policies that are consistent with individuals achieving their maximum level of self-sufficiency.
  4. Continue to operate a Family Self-Sufficiency program for a program size of 125 families.
  5. Continue to operate and staff the Community Services Division to provide housing support services to at-risk and homeless families.
  6. Continue to seek housing support services/case management funding and FSS funding to further increase capacity.
  7. Continue to set aside vouchers for the purpose of assisting in transitional housing for graduates of the transition programs.
  8. Implement of priority on the Voucher Program to individuals and families who have been successful on the HOME Tenant Based Rental Assistance Program.
  9. Advocate continuing operation of a HOME TBRA program when Thurston County becomes and entitlement community under the HOME Program.
  10. Continue to operate the Individual Development Account Program until its expiration with a goal of 50 families saving money toward homeownership, further education, or capitalizing a business.

**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:
- 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:
- Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
- Other: (list below)

**Other PHA Goals and Objectives: (list below)**

**Annual PHA Plan**  
**PHA Fiscal Year 2000**  
[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 Section 8 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.

**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.

**Table of Contents**

Page #

**Annual Plan**

- i. Executive Summary
- ii. Table of Contents
  - 1. Housing Needs
  - 2. Financial Resources
  - 3. Policies on Eligibility, Selection and Admissions
  - 4. Rent Determination Policies
  - 5. Operations and Management Policies
  - 6. Grievance Procedures
  - 7. Capital Improvement Needs
  - 8. Demolition and Disposition
  - 9. Designation of Housing
  - 10. Conversions of Public Housing
  - 11. Homeownership
  - 12. Community Service Programs
  - 13. Crime and Safety

- 14. Pets (Inactive for January 1 PHAs)
- 15. Civil Rights Certifications (included with PHA Plan Certifications)
- 16. Audit
- 17. Asset Management
- 18. Other Information

**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
- FY 2000 Capital Fund Program Annual Statement
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

**Optional Attachments:**

- PHA Management Organizational Chart
- FY 2000 Capital Fund Program 5 Year Action Plan
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- Other (List below, providing each attachment name)
  - Statement of Progress on Meeting the 5-Year Goals (WA049c01)
  - Membership of the Resident Advisory Board (WA049d01)
  - Commissioners Board Representative (WA049e01)
  - Definition of Substantial Deviation (WA049f01)
  - Project Basing Plan (WA049g01)

**Supporting Documents Available for Review**

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

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
x	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
x	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view	5 Year and Annual Plans



<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	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.	
x	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
x	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
x	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
	Public housing rent determination policies, including the methodology 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 <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
x	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
	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
	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

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
	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
	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
x	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
x	Policies governing any Section 8 Homeownership program <input checked="" type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
x	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
x	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
x	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
	The most recent Public Housing Drug Elimination Program (PHDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
x	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

# 1. Statement of Housing Needs

[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	Affordability	Supply	Quality	Accessibility	Size	Location
Income <= 30% of AMI	2,943	5	5	2	2	2	2
Income >30% but <=50% of AMI	2,635	4	3	2	2	2	2
Income >50% but <80% of AMI	2,556	2	2	2	2	2	2
Elderly	1,494	3	2	2	2	2	2
Families with Disabilities	Unknown						
Hispanic	369	5	5	2	2	2	2

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

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

State the housing needs of the families on the PHA's waiting list/s. **Complete one table for each type of PHA-wide waiting list administered by the PHA.** 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			
As of 12/4/03			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	2,703		
Extremely low income <=30% AMI	2,324	86%	
Very low income (>30% but <=50% AMI)	379	14%	
Low income (>50% but <80% AMI)	0	0	
Families with children	1,243	46%	
Elderly families	189	7%	
Families with Disabilities	1,730	64%	
Race/ethnicity Cauc	2,216	82%	
Race/ethnicity Black	216	8%	
Race/ethnicity Asian	162	6%	
Race/ethnicity Nat Am	108	4%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR			

<b>Housing Needs of Families on the Waiting List</b>			
As of 12/4/03			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
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 checked="" 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.

#### **(1) Strategies**

**Need: Shortage of affordable housing for all eligible populations**

**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 section 8 replacement housing resources
- Maintain or increase section 8 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 section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- Maintain or increase section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program

- Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- Other (list below)  
Participated in the Continuum of Care Planning Process

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

Select all that apply

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

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

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

Select all that apply

- Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing
- Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant-based section 8 assistance
- Employ admissions preferences aimed at families with economic hardships
- Adopt rent policies to support and encourage work
- Other: (list below)  
Implemented by meeting the goal of 75% of the applicants coming on the program having incomes at or below 30% of median

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

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

Select all that apply

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

Welfare to Work vouchers will be targeted to families at or below 50% of AMI

**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
- Other: (list below)
  - Maintain knowledge of available assistance to the elderly.
  - Implement the Medicaid Waiver priority to allow persons at risk of Nursing Home placement to be referred directly by Home and Community Services and Area Agency on Aging Case Managers to the Voucher 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
- Affirmatively market to local non-profit agencies that assist families with disabilities
- Other: (list below)

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

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

Select if applicable

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

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

Select all that apply

- Counsel section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units
- Market the section 8 program to owners outside of areas of poverty /minority concentrations
- Other: (list below)
  - The Housing Authority works with all families to assure that they have access to the full gamut of housing choices in the county and beyond through the portability option.

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

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2005 grants)</b>		
a) Public Housing Operating Fund		
b) Public Housing Capital Fund		
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	\$12,402,975	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants		



<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
<b>3. Public Housing Dwelling Rental Income</b>		
<b>4. Other income (list below)</b>		
Family Self Sufficiency	\$82,667	Supportive Services
Moderate Rehab SRO	230,642	Mod Rehab
	208,491	SRO
<b>4. Non-federal sources (list below)</b>		
<b>Total resources</b>	12,924,775	

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

[24 CFR Part 903.7 9 (c)]

#### **A. Public Housing NOT APPLICABLE**

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: (state time)
- 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)

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

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

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

If yes, how many lists?

3.  Yes  No: May families be on more than one list simultaneously

If yes, how many lists?

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

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

**(3) Assignment**

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

- One
- Two
- Three or More

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)

c. Preferences

1.  Yes  No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If “no” is selected, skip to subsection **(5) Occupancy**)
  
2. Which of the following admission preferences does the 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’ families
- Residents who live and/or 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)

3. 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.

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)

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

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)

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: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?

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

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

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

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

Employing new admission preferences at targeted developments  
If selected, list targeted developments below:

Other (list policies and developments targeted below)

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

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

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

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

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

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

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

## B. Section 8

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

### (1) Eligibility

- a. What is the extent of screening conducted by the PHA? (select all that apply)
- Criminal or drug-related activity only to the extent required by law or regulation
  - Criminal and drug-related activity, more extensively than required by law or regulation
  - More general screening than criminal and drug-related activity (list factors below)
  - Other (list below)
- b.  Yes  No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- c.  Yes  No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- d.  Yes  No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)
- e. Indicate what kinds of information you share with prospective landlords? (select all that apply)
- Criminal or drug-related activity
  - Other (describe below)
    - Last known address; last landlord name and address.

### (2) Waiting List Organization

- a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (select all that apply)
- None
  - Federal public housing
  - Federal moderate rehabilitation
  - Federal project-based certificate program
  - Other federal or local program (list below)
    - Project Based Voucher Program and HOME TBRA

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

- PHA main administrative office  
 Other (list below)

**(3) Search Time**

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

If yes, state circumstances below:

- The applicant may request two extensions of 30 days each. A person with a disability may ask for additional time in which to use the voucher.

**(4) Admissions Preferences**

a. Income targeting

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

b. Preferences

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

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

Former Federal preferences - Screening criteria only for persons above 30% of AMI.

- 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 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



- 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)
  - Applicants whose rent burden is greater than 45% of the household's monthly adjusted income. (Allows for deductions towards gross rent of working applicants-in testing rent burden).
  - Families who have successfully completed a transitional housing program and need longer term assistance in order to complete their goals to become self-sufficient.
  - Individuals who have successfully completed a term on the HOME Tenant Based Rental Assistance Program and whose stability will be jeopardized without continuing assistance under the voucher program.
  - Individuals with Medicaid Waiver eligible services who risk being placed in a Nursing Home because they lack affordable housing in the community.
  - Individuals eligible for referral under Project Access or the Family Unification Program.
  - Families who accept in a Project Based unit because others on the waiting list have declined that unit.

3. 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.

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)

- 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

- 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
- 2  Victims of reprisals or hate crimes
- Other preference(s) (list below)

Individuals referred by community agencies for the special set aside of vouchers including Family Unification, Project Access, Medicaid Waiver to avoid Nursing Home placement and HOME Tenant Based Rental Assistance transfers to the voucher program.

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

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

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

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

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

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

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

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

- The Section 8 Administrative Plan
- Briefing sessions and written materials
- Other (list below)
- Outreach materials such as brochures or information sheets.

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

- Through published notices
- Other (list below)

- Through notices to agencies that serve the targeted population and notices to applicants on waiting list..

#### **4. PHA Rent Determination Policies Not Applicable**

[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)
- 95<sup>th</sup> percentile rents
- 75 percent of operating costs
- 100 percent of operating costs for general occupancy (family) developments
- Operating costs plus debt service
- The "rental value" of the unit
- Other (list below)

f. Rent re-determinations:

1. Between income 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)

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

**(2) Flat Rents**

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

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

## B. Section 8 Tenant-Based Assistance

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

### (1) Payment Standards

Describe the voucher 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
- 100% of FMR
- Above 100% but at or below 110% of FMR
- Above 110% of FMR (if HUD approved; describe circumstances below)

During the course of the previous year, the Authority has raised the Payment Standard for the 4 Bedroom units to reflect this submarket. We expect that this may happen regularly.

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

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

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

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

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

- Annually
- Other (list below)

- If it becomes evident during the course of the year that families are having difficulty finding units at prices where they are not rent-burdened, the staff analyzes the market and may make the decision to increase the payment

standard so as to assist families in using the vouchers. There is a small supply of 4 and 5 bedroom homes and virtually no apartments or duplexes in these bedroom sizes.

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

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

Sufficient budget authority from HUD.

## **(2) Minimum Rent**

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

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

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

## **5. Operations and Management**

[24 CFR Part 903.7 9 (e)]

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

### **A. PHA Management Structure**

Describe the PHA's management structure and organization.

(select one)

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

**B. HUD Programs Under PHA Management**

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

<b>Program Name</b>	<b>Units or Families Served at Year Beginning</b>	<b>Expected Turnover</b>
Public Housing	N/A	
Section 8 Vouchers/Certificates	1.102	174
Section 8 Mod Rehab	85	45%
Special Purpose Section 8 Certificates/Vouchers (list individually)		
1. Welfare to Work	270	
2. Disability	425	
3. Mainstream	75	126
4. Family Unification	22	
Public Housing Drug Elimination Program (PHDEP)	N/A	
Other Federal Programs(list individually)	N/A	

**C. Management and Maintenance Policies**

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

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

(2) Section 8 Management: (list below)

**Standard Operating Procedures Manual**



## **6. PHA Grievance Procedures – Not Applicable**

[24 CFR Part 903.7 9 (f)]

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

### **A. Public Housing**

1.  Yes  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. Section 8 Tenant-Based Assistance**

1.  Yes  No: Has the PHA established informal review procedures for applicants to the Section 8 tenant-based assistance program and informal hearing procedures for families assisted by the Section 8 tenant-based assistance program in addition to federal requirements found at 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 Not Applicable**

[24 CFR Part 903.7 9 (g)]

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

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

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

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

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

Select one:

The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name)

-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 (state name)

-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) Not Applicable**

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:

## **8. Demolition and Disposition Not Applicable**

[24 CFR Part 903.7 9 (h)]

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

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

### 2. Activity Description

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

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

**9. Designation of Public Housing for Occupancy by Elderly Families or Families with Disabilities or Elderly Families and Families with Disabilities – Not Applicable**

[24 CFR Part 903.7 9 (i)]

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

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

2. Activity Description

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

<b>Designation of Public Housing Activity Description</b>	
1a. Development name:	
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:	<u>(DD/MM/YY)</u>
5. If approved, will this designation constitute a (select one)	<input type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected:	
7. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input type="checkbox"/> Total development

## **10. Conversion of Public Housing to Tenant-Based Assistance – Not Applicable**

[24 CFR Part 903.7 9 (j)]

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

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

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

#### 2. Activity Description

Yes  No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing

Asset Management Table? If “yes”, skip to component 11. If “No”, complete the Activity Description table below.

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

**A. Public Housing**

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

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

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

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

## B. Section 8 Tenant Based Assistance

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

### 2. Program Description: Homeownership Voucher Program

#### a. Size of Program

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

- In its initial stages until we have some experience, the decision has been made to keep the process open and without a maximum number of participants.

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

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

#### b. PHA-established eligibility criteria

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

If yes, list criteria below:

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

[24 CFR Part 903.7 9 (l)]

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

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

#### 1. Cooperative agreements:

- Yes  No: Has the PHA 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? 03/11/99

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

Preference to individuals and families who have been assisted under transitional housing and support services programs.

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. )



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 – Not Applicable**

[24 CFR Part 903.7 9 (m)]

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

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

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

- High incidence of violent and/or drug-related crime in some or all of the PHA's developments
- High incidence of violent and/or drug-related crime in the 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 used 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 2000 in this PHA Plan?
- Yes  No: This PHDEP Plan is an Attachment. (Attachment Filename: \_\_\_\_)

**14. RESERVED FOR PET POLICY**

[24 CFR Part 903.7 9 (n)]

**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)]

- 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 – Not Applicable**

[24 CFR Part 903.7 9 (q)]

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

1.  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? At Participant Advisory Meeting, discussions and recommendations were made.
  
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
  - Attached at Attachment (File name) **Need file name here**
  - 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:  
Participant Advisory Committee agreed to changes proposed at the meeting.
  - 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)

Self nominated and appointed by Thurston County Board of Commissioners

b. Eligible candidates: (select one)

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

c. Eligible voters: (select all that apply)

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

See above: Self nominated and appointed by Thurston County Board of Commissioners.

**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: (City of Olympia and Thurston County)
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
- The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.

- The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
  - Increase the number of affordable housing units by:
    - Applying for additional Section 8 units should they become available.
    - Leverage affordable housing resources in the community through the creation of mixed-finance housing.
    - Pursue housing resources other than public housing or Section 8 tenant-based assistance.
    - Set aside up to 300 vouchers to project base with non profit rental owners in Thurston County.
- Other: (list below)

With the City of Olympia, the Housing Authority of Thurston County held a community focus group to coordinate public participation in the 5-Year Plan, and the Consolidated Plan. The Housing Authority participated in focus group meetings for the State Consolidated Plan and has participated in the Thurston County Consolidated Planning for HOME administration.

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

**D. Other Information Required by HUD**

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



## Attachments

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

- WA049a04 Organizational Chart
- WA049b04 PAC Member List
- WA049c04 Performance Report
- WA049d04 PAC Meeting 12/05/03 minutes
- WA049e04 Public Hearing Minutes February 19, 2004
- WA049f04 Board of Commissioners Including Resident Member

# PHA Plan Table Library

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

### Annual Statement Capital Fund Program (CFP) Part I: Summary

Capital Fund Grant Number      FFY of Grant Approval: (MM/YYYY)

Original Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	
3	1408 Management Improvements	
4	1410 Administration	
5	1411 Audit	
6	1415 Liquidated Damages	
7	1430 Fees and Costs	
8	1440 Site Acquisition	
9	1450 Site Improvement	
10	1460 Dwelling Structures	
11	1465.1 Dwelling Equipment-Nonexpendable	
12	1470 Nondwelling Structures	
13	1475 Nondwelling Equipment	
14	1485 Demolition	
15	1490 Replacement Reserve	
16	1492 Moving to Work Demonstration	
17	1495.1 Relocation Costs	
18	1498 Mod Used for Development	
19	1502 Contingency	
20	<b>Amount of Annual Grant (Sum of lines 2-19)</b>	
21	Amount of line 20 Related to LBP Activities	
22	Amount of line 20 Related to Section 504 Compliance	
23	Amount of line 20 Related to Security	
24	Amount of line 20 Related to Energy Conservation Measures	

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

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost

**Annual Statement**

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

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)	All Funds Expended (Quarter Ending Date)

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

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

Optional 5-Year Action Plan Tables				
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development	
Description of Needed Physical Improvements or Management Improvements			Estimated Cost	Planned Start Date (HA Fiscal Year)
<b>Total estimated cost over next 5 years</b>				



**Housing Authority of Thurston County  
Organization Chart**

**Board of Commissioners**

**Executive Director      Executive Assistant**

**Rental Assistance**

**Housing Program  
Manager**

Housing Program  
Specialists

Housing Program Assistants

Office Assistants

AmeriCorps Members

*Section 8 Vouchers, Home,  
Moderate Rehabilitation  
Family Self Sufficiency Program  
Front Office Operations*

**Housing Development**

**Housing Development  
Manager**

Housing Rehabilitation Specialist

*CDBG Rehabilitation  
Mansfield Apartments Moderate  
Rehabilitation  
Property Acquisition Management  
Lead Base Paint Operations  
Office Building Management*

**Community Services**

**Community Services  
Manager**

Housing Program Specialists

FSS Coordinator

Emergency Apartments Manager

AmeriCorps Members

*Emergency Shelter Grants Programs  
Emergency Shelter Assistance Program  
Emergency Shelter Apartments  
Mansfield Apartments  
Individual Development Account  
Family Self Sufficient Program  
Property and Special Needs Tenant  
Management  
HOME/2060  
Homeownership*

**Administrative Services**

**Housing Finance  
Manager**

Finance Specialist

Fiscal Assistants

Finance Specialist

*Finance  
Risk Management  
Grants Management  
Human Resources*

**JOANNE BARKER**  
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OLYMPIA, WASHINGTON 98512

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Lacey WA 98503

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Columbia Legal Services  
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Olympia, WA 98501

**Paul Grudis**  
Evergreen Vista Apartments  
1209 Fern St  
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**Craig Chance**  
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**Neil McClanahan**  
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Olympia, WA 98502

**Cheryl Noel**  
Sterling Savings  
HWY 12 & Foster  
Rochester, WA 98579

**Lew Lewis**  
120 State Avenue N.E. #1027  
Olympia, WA 98501-8212





***Performance for Fiscal Year through November 30, 2003***  
**Progress In Meeting The Mission And Goals**  
**Described In The 5 Year Plan.**

**Goal:** It is the intention of staff over the next year to develop a Standard Operations Manual separate from the Administrative Plan which will be limited to policy issues rather than administrative procedures (as suggested by the Housing Voucher Program Guidebook). This will be available at the Main Office along with the Administrative Plan.

**Progress:** We have begun the putting together the Standard Operating Procedures Manual but have not yet gone through the Administrative Plan to remove the detail that does not need to be in the Plan.

**Goal:** Implement voucher homeownership program: (FY 2004).

**Progress:** HATC has adopted the Administrative Plan for the Voucher Homeownership Program. We have also secured funding for a second loan which the Voucher Program HA will be used to pay down. The Administrative Policies for that are being drafted at this time.

**Goal:** Continue to set aside vouchers for the purpose of assisting in transitional housing for graduates of the transition programs. (FY 2004) Implement a priority on the Voucher Program to individuals and families who have been successful on the HOME Tenant Based Rental Assistance Program. (FY 2004)

**Progress:** The Administrative Plan, instead of setting aside vouchers, gives a preference to individuals and families who have successfully completed the Transitional Housing Program to getting a voucher. There are 14 households on the program as of November 1<sup>st</sup> who were given this preference.

**Goal:** Advocate continuing operation of a HOME TBRA program when Thurston County becomes an entitlement community under the HOME Program. (FY 2004)

**Progress:** The Thurston County Consortium set aside funding for 125 households in three population groups for this transitional housing program: homeless and at-risk youth, homeless and at-risk families, persons with chronic mental illness. The Community also tied services through the Regional Support Network and the McKinney Homeless funding to provide services to the participants in the program.

**Goal:** Continue to operate the Individual Development Account Program until its expiration with a goal of 50 families saving money toward homeownership, further education, or capitalizing a business. (FY 2004)

**Progress:** The Housing Authority continues to operate the IDA Program. There have been 52 participants in the program since its inception.

**Goal:** Maintain or increase voucher program lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction.

**Progress:** As of November 1, 2003, the Voucher Program is over 100% leased. Under new rules statutorily mandated, the Housing Authority will have to limit the issuance of vouchers. Populations to be served when vouchers are available will be single non-elderly individuals with disabilities in order to meet the need to target vouchers to this population.

**Goal:** Undertake measures to ensure access to affordable housing among families assisted by the HA, regardless of unit size required.

**Progress:** Households are taken from the waiting list in accordance with the preference policy adopted in the administrative plan and statutory requirements that at least 75% of the households we serve have incomes at or below 30% of median. The bedroom size does not come into play.

Households are helped on a first-come first-served basis except for targeted allocations (e.g., welfare to work and vouchers for single non-elderly individuals with disabilities, Project Access, Medicaid Waiver vouchers, Family Unification Program vouchers) and special local preferences provided for in the administrative plan. These preferences include 8 vouchers for Persons with HIV/AIDS, families and individuals transitioning from the transitional assistance under the HOME Tenant Based Rental Assistance Program, as well as the targeted vouchers: Project Access Vouchers for Persons who are transitioning out of nursing homes under the Medicaid Waiver Program and other individuals who can avoid nursing home placement through the provision of a voucher and services under the Medicaid Waiver Program.

During the year, we took served families out of order in order to meet the 75% requirement for assisting households with incomes at or below 30% of median and to meet the needs of those households with local preferences.

**Goal:** Maintain or increase voucher program lease-up rates by marketing the program to owners, particularly those outside areas of minority and poverty concentration.

**Progress:** We have had meetings with Landlord and Property Management representatives. We have had four meetings for owners to get orientations and for the staff to receive in-put about policies and procedures that could be modified to be more user friendly. We have called a number of management companies to get their in-put on our procedures that might negatively impact them.

**Goal:** Participate in the Consolidated Plan development process to ensure coordination with broader community strategies.

**Progress:** Members of our staff serve on local groups including the Work First Local Area Planning group, the Partners for Children, Youth and Families, the Housing Task Force, the HOME Consolidated Planning Group and the Continuum of Care Committee for Homeless Individuals and Families. The Executive Director also serves on a number of Statewide Planning Groups making policies that affect our community.

**Goal:** Participate in the HOME Consortium Planning Process.

**Progress:** The Housing Authority played an active role in the HOME Consortium Planning Process. The Plan has been accepted and Thurston County is a HOME Entitlement Community as of September 1, 2003.

**Goal:** Apply for additional voucher units should they become available.

**Progress:** The Housing Authority was one of 303 housing authorities across the county that applied for Mainstream vouchers (only 1,800 available). HATC was not one of the 23 authorities funded.

**Goal:** Leverage affordable housing resources in the community through the creation of mixed-finance housing.

**Progress:** The HATC staff is in the preliminary stages of two projects as of November 2003.

**Goal:** Contracting with private not-for-profit entities with Project Based Voucher Assistance.

**Progress:** The Housing Authority has signed contracts for eight projects totaling 101 units. This is a partnership with area non-profits including BHR, Intercommunity Housing, Community Action, Homes First!, Community Youth Services and Behavioral Health Resources to provide subsidies for their units. Up to 300 units could be available for use by individuals and families under the program. Existing tenants in the units qualified for the subsidy. Vacant units are filled by households from the Housing Authority's waiting list.

Six units are still in the pipeline for approval.

**Goal:** Pursue housing resources other than public housing or Section 8 tenant-based assistance.

**Progress:** Thurston County is now a HOME Entitlement Jurisdiction as of September 1, 2003. This has brought additional HOME Tenant Based Rental Assistance dollars to the community allowing us to help more special needs populations in this transitional housing program.

**Goal:** Target available assistance to families at or below 30% of the AMI. Plan to meet the federal targeting requirement by maintaining that 75% of all new admissions to the Voucher Program will be families at or below 30% of the area median income

**Progress:** In the past year, we have had to skip over applicants in order to meet this requirement. In the Fiscal Year ending June 2003, 79% of the households served under the Voucher Program had incomes at or below 30% Area Median.

**Goal:** Apply for special-purpose vouchers targeted to the elderly, should they become available.

**Progress:** Except for the Mainstream vouchers there were no allocations to apply for this year. Eighteen of the units under the Project Based Program are reserved for persons who are elderly.

**Goal:** Target vouchers for persons over 62 coming out of Nursing Homes on the Access Model. Set aside vouchers for an Access Program Model if Thurston County is eliminated from the King County Program.

**Progress:** Before we had the opportunity to expand this model, we have been forced to cut back on our issuance of vouchers. Those over 62 years are not eligible for the official Project Access. Project Access has continued under King County Housing Authority so we did not have to implement the goal of setting vouchers aside.

**Goal:** Implement the Medicaid Waiver priority to allow persons at risk of Nursing Home placement to be referred directly by Home and Community Services and Area Agency on Aging Case Managers to the Voucher program.

**Progress:** Referrals for this program are being made by Home and Community Services. We have assisted one individual. We now have additional referrals but we cannot issue any additional vouchers at this time. These referrals will get a preference when we again have vouchers to issue.

**Other Accomplishments:**

During the past year the Housing Authority has had some additional successes:

1. Provided a leadership role in having the jurisdictions in Thurston County apply to the US Department of Housing and Urban Development to become a Consortium in order to apply for HOME Entitlement designation. That effort was successful and Thurston County and all its incorporated entities will start receiving funding under this program for the program year effective September 2003.
2. Provided a leadership role in getting the jurisdictions in the County to enter into a cooperative agreement for the matching of revenue from HR 2060 as a match for the HOME funding.
3. The HATC, in partnership with the Regional Support Network, Mental Health Provider Agencies, the Housing Authority's Community Services Office and the City of Olympia, received \$240,000 in funding from the State Office of Community Development to expand the HOME Tenant Based Rental Assistance Program to assist families being displaced from an apartment community in Olympia because of substandard conditions, additional homeless families and additional mental health service participants.

## ***Performance Summary for the Rental Assistance Program:***

### ***Fiscal Year 2002-2003***

#### **Voucher Participants**

- Families in Thurston County on Portable Vouchers: - **101 households**
- Participating Thurston County Families during the year: - **2,029 households**
- Units in the Project Based Voucher Program - **101 units**

**Uhler and Martin Terrace Apartments - 43 Units**

**Fleetwood Apartments - 43 Units**

#### **HOME Program Participants**

- Mental Health Consumers served: **85 households**
- Homeless and At-Risk Families: **55 households**

**Total Served in the Programs during the Fiscal Year: 2,457 households**

#### **Other Data about the Program:**

- Set aside of four additional units of housing for persons with HIV / AIDS
- Thirty four of the 101 project based units are for persons with disabilities.
- Eighteen of the 101 project based units are for elderly persons.
- Three persons with disabilities in Nursing Homes were assisted in exiting and using a Voucher and services through DSHS Home and Community Services Division under Project Access.
- One person with a disability avoided Nursing Home Placement with the issuance of a voucher and coordination of Medicaid Waiver services.

## **Participant Advisory Committee Meeting Minutes December 5, 2003**

**Participants:** Kris Knash, Rick Johanson, Jr., Peggie Hicks, Elizabeth Anderson, Paul Grundis, Greg Provenzano, Kelly Kellogg, Helen Plaja, Joy Mitchell, Karen McVea, Maureen Hill, James Gutierrez, Dee Faircloth

Welcome and introductions.

**Maureen** reviewed the proposed timeline for the Annual Planning Process.

James briefed participants on the Homebuyer Program, Individual Development Account (IDA), Family Self-sufficiency Program (FSS) and how each related to the other. Questions and answer period followed.

**Maureen** presented the following performance report:

We have begun the putting together the Standard Operating Procedures Manual but have not yet gone through the Administrative Plan to remove the detail that does not need to be in the Plan. HATC has adopted the Administrative Plan for the Voucher Homeownership Program. We have also secured funding for a second loan which the Voucher Program HA will be used to pay down. The Administrative Policies for that are being drafted at this time. The Administrative Plan, instead of setting aside vouchers, gives a preference to individuals and families who have successfully completed the Transitional Housing Program to getting a voucher. There are 14 households on the program as of November 1<sup>st</sup> who were given this preference.

The Thurston County Consortium set aside funding for 125 households in three population groups for this transitional housing program: homeless and at-risk youth, homeless and at-risk families, persons with chronic mental illness. The Community also tied services through the Regional Support Network and the McKinney Homeless funding to provide services to the participants in the program.

The Housing Authority continues to operate the IDA Program. There have been 52 participants in the program since its inception.

As of November 1, 2003, the Voucher Program is over 100% leased. Under new rules statutorily mandated, the Housing Authority will have to limit the issuance of vouchers. Populations to be served when vouchers are available will be single non-elderly individuals with disabilities in order to meet the need to target vouchers to this population.

Households are taken from the waiting list in accordance with the preference policy adopted in the administrative plan and statutory requirements that at least 75% of the households we serve have incomes at or below 30% of median. The bedroom size does not come into play.



**Participant Advisory Committee Meeting  
December 5, 2003  
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Households are helped on a first-come first –served basis except for targeted allocations (e.g., welfare to work and vouchers for single non-elderly individuals with disabilities, Project Access, Medicaid Waiver vouchers, Family Unification Program vouchers) and special local preferences provided for in the administrative plan. These preferences include 8 vouchers for Persons with HIV/AIDS, families and individuals transitioning from the transitional assistance under the HOME Tenant Based Rental Assistance Program, as well as the targeted vouchers: Project Access Vouchers for Persons who are transitioning out of nursing homes under the Medicaid Waiver Program and other individuals who can avoid nursing home placement through the provision of a voucher and services under the Medicaid Waiver Program.

During the year, we took several families out of order in order to meet the 75% requirement for assisting households with incomes at or below 30% of median and to meet the needs of those households with local preferences.

We have had meetings with Landlord and Property Management representatives. We have had four meetings for owners to get orientations and for the staff to receive in-put about policies and procedures that could be modified to be more user friendly. We have called a number of management companies to get their in-put on our procedures that might negatively impact them.

Members of our staff serve on local groups including the Work First Local Area Planning group, the Partners for Children, Youth and Families, the Housing Task Force, the HOME Consolidated Planning Group and the Continuum of Care Committee for Homeless Individuals and Families. The Executive Director also serves on a number of Statewide Planning Groups making policies that affect our community.

The Housing Authority played an active role in the HOME Consortium Planning Process. The Plan has been accepted and Thurston County is a HOME Entitlement Community as of September 1, 2003.

The Housing Authority was one of 303 housing authorities across the county that applied for Mainstream vouchers (only 1,800 available). HATC was not one of the 23 authorities funded.

The HATC staff is in the preliminary stages of two projects as of November 2003.

The Housing Authority has signed contracts for eight projects totaling 101 units. This is a partnership with area non-profits including BHR, Intercommunity Housing, Community Action, Homes First! Community Youth Services and Behavioral Health Resources to provide subsidies for their units. Up to 300 units could be available for use by individuals and families under the program. Existing tenants in the units qualified for the subsidy. Vacant units are filled by households from the Housing Authority's waiting list.

Six units are still in the pipeline for approval.

Thurston County is now a HOME Entitlement Jurisdiction as of September 1, 2003. This has brought additional HOME Tenant Based Rental Assistance dollars to the community allowing us to help more special needs populations in this transitional housing program.

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In the past year, we have had to skip over applicants in order to meet this requirement. In the Fiscal Year ending June 2003, 79% of the households served under the Voucher Program had incomes at or below 30% Area Median.

Except for the Mainstream vouchers there were no allocations to apply for this year. Eighteen of the units under the Project Based Program are reserved for persons who are elderly.

Before we had the opportunity to expand this model, we have been forced to cut back on our issuance of vouchers. Those over 62 years are not eligible for the official Project Access. Project Access has continued under King County Housing Authority so we did not have to implement the goal of setting vouchers aside.

Referrals for this program are being made by Home and Community Services. We have assisted one individual. We now have additional referrals but we cannot issue any additional vouchers at this time. These referrals will get a preference when we again have vouchers to issue.

**Other Accomplishments:**

During the past year the Housing Authority has had some additional successes:

1. Provided a leadership role in having the jurisdictions in Thurston County apply to the US Department of Housing and Urban Development to become a Consortium in order to apply for HOME Entitlement designation. That effort was successful and Thurston County and all its incorporated entities will start receiving funding under this program for the program year effective September 2003.
2. Provided a leadership role in getting the jurisdictions in the County to enter into a cooperative agreement for the matching of revenue from HR 2060 as a match for the HOME funding.
3. The HATC, in partnership with the Regional Support Network, Mental Health Provider Agencies, the Housing Authority's Community Services Office and the City of Olympia, received \$240,000 in funding from the State Office of Community Development to expand the HOME Tenant Based Rental Assistance Program to assist families being displaced from an apartment community in Olympia because of substandard conditions, additional homeless families and additional mental health service participants.

**Performance Summary for the Rental Assistance Program:**

**Fiscal Year 2002-2003**

**Voucher Participants**

- Families in Thurston County on Portable Vouchers: - **101 households**
- Participating Thurston County Families during the year: - **2,029 households**
- Units in the Project Based Voucher Program - **101 units**

**Uhler and Martin Terrace Apartments - 43 Units**

**Fleetwood Apartments - 43 Units**

**HOME Program Participants**

- Mental Health Consumers served: **85 households**
- Homeless and At-Risk Families: **55 households**

**Total Served in the Programs during the Fiscal Year: 2,457 households**

**Other Data about the Program:**

- Set aside of four additional units of housing for persons with HIV / AIDS
- Thirty four of the 101 project based units are for persons with disabilities.
- Eighteen of the 101 project based units are for elderly persons.
- Three persons with disabilities in Nursing Homes were assisted in exiting and using a Voucher and services through DSHS Home and Community Services Division under Project Access.
- One person with a disability avoided Nursing Home Placement with the issuance of a voucher and coordination of Medicaid Waiver services.

**Staff presented for discussion the following proposed policy additions and changes for the Voucher Program:**

**Need to clarify our Priorities and Preferences:**

Priorities: Refers to the household types the program will assist before other household types. Only single and couples where the individuals are younger than 50 years and there is no disability are not on the priority list. These individuals and couples remain on the waiting list but we are unlikely to be able to serve them because of the large number of applicants who are parts of families or are elderly, near-elderly or have disabilities.

**Discussion: After discussion no alternate proposals were offered. There was agreement with the recommendations being proposed by staff.**

**Statutory Preference:** The first line of screening is income. Seventy – five percent of the households that will be served by the program must have incomes at or below 30% of median. Applicants whose incomes are above 30% median are passed over in order to meet this statutory requirement.

Persons who are between 31% and 50% of median must meet one of the needs defined in the policies. An applicant claiming a rent burden-burden need must demonstrate that they pay in excess of 40% of their MAI for rent. In reaching their MAI, the Housing Authority excludes 15% of gross earnings from the analysis.

**Discussion: After discussion no alternate proposals were offered. There was agreement with the recommendations being proposed by staff.**

**Local Preferences:** Households have a master number issued at the time of application and are generally served in the order of the master number. We want to clarify that applicants who are referred forward because they have a locally adopted preference may be served prior to an earlier applicant to the waiting list. Persons in these preference categories include the following groups in no particular order:

1. Persons eligible for the Medicaid Waiver set-aside to prevent Nursing Home Placement.
2. Persons eligible for Project Access – a non-elderly person exiting a Nursing Home- these are King County HA administered vouchers and do not come out of our pool.
3. Persons with HIV-AIDS up to 8 slots
4. Families who have successfully completed a transitional housing program and need longer term assistance in order to complete their goals to become self-sufficient. Individuals who have successfully completed a term on the HOME Tenant Based Rental Assistance Program and whose stability will be jeopardized without continuing assistance under the voucher program. (Up to 40 slots. A slot is considered taken until the household's master number is reached, then the slot becomes available for another referral)
5. Persons who elect to go into a Project Based Unit – the waiting list serves as the tenant recruitment for occupancy in the units under HAP contract with the Housing Authority. Applicants are given the opportunity to check Project Based units on the Pre-application. As vacancies occur applicants are referred to the units for screening. If selected by the Properties, the household then goes through the eligibility process for the voucher.
6. Households referred by the Division of Children and Family Services who qualify for the Family Unification Program.

**Discussion: After discussion no alternate proposals were offered. There was agreement with the recommendations being proposed by staff.**

**HOME TBRA Program:**

The HOME Tenant Based Rental Assistance Program is using the Voucher Program waiting list to determine the order that referred households will be assisted in this transitional housing program which is linked to the provision of transitional housing services. Applicants are selected based on their referral date from the Community Agencies that are providing transitional services to this group of homeless individuals and families. If the HOME Program has additional funds in this program, applicants will be selected from the Voucher Program waiting list based on the order of their application and certification that they meet the definition of those special needs populations being served by the HOME program.

**Discussion: After discussion no alternate proposals were offered. There was agreement with the recommendations being proposed by staff.**

**Waiting List Management**

The propose changes: Time and date stamp as received, each working day of the month. This is a change from the previous system of accepting and logging applications as received during the first five working days of the month and then logging future applications that month as if received on the first working day of the following month.

**Interim Reporting Requirements -** We propose the following changes in the policy. Current policy is to do interims only as income decreases or where income increases only for persons who had no income at the time of their last recertification. We propose the following changes. In cases where a tenant asks for an increase in assistance because of a decrease in income because of a change in circumstances (e.g., maternity leave or disability leave or temporary layoff from a job), the tenant will be required to report when the temporary reduction in income ends and an interim increase will be instituted. Also, during the course of the time between the annual paperwork being completed (up to 120 days before the Recert date), the tenant will be required to report changes. They will be reminded in their Notice of Change. In all cases, the Housing Authority will continue to give a 30 day notice when reporting has been done on a timely basis.

**Discussion: After discussion no alternate proposals were offered. There was agreement with the recommendations being proposed by staff.**

**New Higher Levels of Third Party Verification**

HUD is putting increased emphasis on third party verifications for the program to use. The highest and best verifications from the income source direct. Our Rental Income Monitoring Report emphasized this and there is extensive training on this issue being sponsored by HUD.

**Reasonable Accommodation**

We have created a form to be completed by the participant and a person certifying the need for an accommodation from Housing Authority's standard policies and procedures because of a disability.

**Discussion: After discussion no alternate proposals were offered. There was agreement with the recommendations being proposed by staff.**

**Proposed Change to the Amount of Initial Time Given to an Applicant to Use their Voucher**

With the new constraints on the Housing Authority for getting reimbursed for over-leasing, we propose giving applicants a 60 day time limit on the voucher with the possibility of getting 2 additional extensions of 30 days each. As now, the Housing Authority can determine whether or not to give an extension. As now, also allowing for reasonable accommodation but asking the person with a disability to have a Reasonable Accommodation form completed and submitted.

In times of constraints on the budget, the Housing Authority would also have the right to issue vouchers for 30 days and delay extensions until there is budget authority left. The Housing Authority in extreme cases will recall the voucher entirely.

In all cases, where the tenant has shown good faith effort to utilize the voucher the Housing Authority will re-issue the voucher at a later date when there is a voucher available in order to give each applicant an equivalent length of time to utilize the voucher.

Extensions will not be granted or the voucher issued at a later date unless the applicant has complied with the requests as outlined in the Administrative Plan and the instructions provided at the briefing.

**Discussion: After discussion no alternate proposals were offered. There was agreement with the recommendations being proposed by staff.**

**Briefing at Eligibility**

When there are booklets available, the Housing Authority will use the Nan McKay produced spiral book called the Family Handbook. In addition, materials particular to the Housing Authority of Thurston County voucher will be used to supplement those materials. Limited experience with the use of the booklets has proven positive and we will continue to use them as supplies are available for this program year.

**Mover Briefings**

Formal briefings at the time of a tenant move may be eliminated. Much of the process will occur by mail and by phone. We have not completed the rewriting the proposed changes.

**Discussion: After discussion no alternate proposals were offered. There was agreement with the recommendations being proposed by staff.**

Meeting adjourned.

**Housing Authority of Thurston County  
Public Hearing/Annual Plan/Annual Meeting  
February 19, 2004**

**Public Hearing**

Tape 1 Side 2 073

**Opening of Public Hearing**

**Participant Panel Presentation:** Ruth introduced Audra Taylor who is at the Lake Park transitional apartments and doing quite well. Audra expressed that she finished training in September at South Puget Sound in office careers. She plans to start the next quarter in April for further training. James introduced Scott Streeter who has gone through the voucher, Self-Sufficiency and IDA programs and is now ready to buy his house. Scott expressed that he will be buying his house in the next couple of days. Scott stated that when he first came to the Housing Authority he and his son were living day by day trying to make it. He was able to move forward as a result of the programs. James introduced Peggie Hicks who graduated from the Family Self-Sufficiency Program and has now moved into her new house. Peggie increased her earned income 425 % while on the program. Her original goal when she came into the program was to buy a house and she purchased a house in December. Peggie stated that she remembers dreaming about owning a house and now her dreams have become true thanks to the Housing Authority. Her advice to others is to set goals and reach for them.

**Rental Assistance Annual Plan:**

Chris stated that the continuum of care involves three categories of housing: emergency, transitional and permanent housing. Emergency housing is 0-90 days, transitional housing is typically up to 2 years and it can come in two forms. One is you can have a property dedicated to transitional housing. For instance, our Lake Park Apartments, an 8-plex is transitional housing. Families can live there up to 2 years and we have extensive support services wrapped around these families to make sure that they are able to transition into permanent housing. These families have come from our emergency shelter and have moved into transitional housing. The second category to transitional housing is helping people into permanent housing and then wrapping the transitional support services while they are in permanent housing throughout the community. You can either



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have a stand alone property or have people disbursed throughout the community, but the key to it is all the individuals in transitional housing have significant supportive services to help them transition through the continuum of care. For the most part, from homelessness, to emergency shelter, through transitional housing, into permanent housing where we all want to be and that is through rental housing, home ownership and/or supportive housing. There are individuals in our community who are not able to achieve the level of life styles that we and the majority of clients are able to do. That is for many reason they have special needs, either chronic long-term mental illness or they could have developmentally disability or some other physical illness, such as HIV/Aids, that they are not able to become completely independent. It is through supportive housing that our rental assistance program funds the supportive housing, permanent housing for individuals and families can either be on the program and become self sufficient or for individuals who are in a longer curve and perhaps some for the rest of the lives because of the developmentally disability. For instance, they are not able to live independently.

We have 4 emergency apartments where we receive families from Safeplace, Bread & Roses and the Salvation Army. Our emergency apartments are always full, but the good news is we have an 80% plus success rate with these families. We are able to move threes families through the continuum of care, to independence and to self sufficiency.

In our transitional housing, we have a multitude of programs, for instance Lake Park apartments, we work in both formats, we have projects specific to transitional housing and we also have transitional clients throughout the community where we are providing supportive services. Another example of transitional housing out in the community is our HOME program where we administer a tenant based rental assistance program. Our hope is for those who needs a longer term support in the permanent supportive housing, that we put people from our emergency shelter on to our HOME tenant base rental assistance program and then hopefully we are able to transition our at-risk youth, mental health consumers, our homeless families with children and homeless individuals onto the voucher rental assistance program into permanent housing. In our permanent housing category we have almost 2100 households served during this fiscal year and that is growing now that we have our HOME entitlement.

Making this plan come alive we believe and we have worked this constantly, there are 3 plans that are critical in making the continuum of care work. One is the Continuum of Care Plan, which helps us access federal McKinney dollars, but it does more. It helps us prioritize and network with other communities regarding our emergency shelter program throughout Thurston County. We have the Consolidated Planning Process, which helps us access programs such as the Community Development Block Grant, the HOME

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program and Emergency Shelter Program. Then, we have the Housing Authority Plan and that focuses primarily on our significant program, according to our Annual Report, 77% of our operations, our Rental Assistance services. What we are the only one in this state to combine and work all three of these plans together. Not only are we one of the if not the only one is the state that has made an effort to combine these plans together, we at the Housing Authority with the help of the Housing Task Force and the Interjurisdictional Forum on Homeless, we staff and write these plans. We make this happen throughout the community and credit goes to all the staff for helping to make these 3 planning processes really work in the full spectrum of the continuum of care.

Maureen stated that this meeting really covers three time-periods with some overlap: the Annual Report for the Agency is for Fiscal Year July 1, 2002-June 30, 2003, The Performance Report for the Planning Process covers the period to date in the current fiscal year from July 1, 2003 to June 30 2004 and the Annual Plan for the coming year covers the next Fiscal year for the period July 1, 2004 through June 30, 2005.

The Public Hearing part of the Meeting covers the activity of the agency and the policies and procedures and goals as they relate solely to the Rental Assistance Division. Some references in the Plan touch on what other things the Housing Authority is doing to address the housing needs of persons with low incomes but primarily we are looking at the Rental Assistance Programs.

Another thing about this planning process is that, although we are setting goals and objectives, for what happens in the future, most of the program funding sources are out of our control. What we do when we have the opportunity is go for the gusto—apply at every opportunity to bring resources to bear on this population. What happens in reality is that we probably will see no increase in funding in the coming year and in fact, if you read some interpretations of what is coming down, the dollars will remain static or drop, and therefore we will likely to be able to help fewer households.

Summary of the Policies Being Proposed for the Administrative Plan are as follows:

- Implementation and recertification for households eligible for Earned Income Disregard
- Medical Marijuana and Federal Law
- Verifying the age of Household members
- Setting Payment Standards

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- Voucher Time limits – updated proposal. 60 day time limit and one extension for a total of 90 days. And then additional time for persons with disabilities.
- Local Preferences -- spelling it out a little more clearly
- Waiting List Management
- Permitting the suspension of vouchers for persons with disabilities who need to be out of the household for a period of time. – Language not yet in place
- Permitting suspension of the voucher for persons who need to go into in-patient drug treatment for a period of time.- Language not yet in place
- Determine the threshold level of funds in a household checking account that can be considered nominal and available for day-to-day needs. The value of one month's income?
- Define “temporarily absent” for counting household membership
- Define excluded trainings as annual income. See A-7 – 5.609 (c)(v)
- Identify allowable medical expenses. IRS puts out PUB.502 yearly identifying allowable expenses to use as guidance. ([www.IRS.gov](http://www.IRS.gov))
- Define the policy for overpayment recovery.
- Define how HA will handle seasonal employment.
- Need policy & procedures re: how long after 3<sup>rd</sup> –party verification is requested can secondary verification be used? Should the form be re-sent after so many days? How long after 2<sup>nd</sup> form is sent can secondary verification be used? (etc.)
- Define how to deal with provisional employment.
- Define cost-effective threshold for getting verifications.
- Define how to calculate assets & income.

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**Public Comments**

1. **Greg Provenzo:** There is some discussion on how you are going to set payment standards. **Greg** stated that he thinks it is important to maintain payment standards so that people may truly have a choice and that they are not rent over burden except by choice. He said that he really thinks it's important for the voucher program to put the standards at a reasonable level.

**Response:**

**Maureen** responded that we do look at our data base to see what rents are and that they are currently well below the payment standard, which means that on an average, it doesn't mean that so up there. We will if we have to recommend reducing payment standards significantly if that is what the budget dictates. **Chris** responded that she feels the program needs flexibility to be able to set the standards.

**No other comments**

**Close Public Hearing**

**Housing Authority of Thurston County**  
**Board of Commissioners**

**Craig D. Chance**  
5129 Viewridge Dr. S.E..  
Olympia, Washington 98501  
Spouse: Kathy Chance

**Commissioner**  
Date Appointed: 11/16/92  
Term Expires: 10/16/2004  
Position: #4

**Cheryl Noel**  
P.O. Box 507  
Rochester, Washington 98579  
Spouse: Steve Noel

**Chair**  
Date Appointed: 11/16/92  
Term Expires: 10/31/2004  
Position: #2

**Neil McClanahan**  
2000 Lakeridge Drive  
Olympia, Washington 98502  
Spouse: Sandra McClanahan

**Commissioner**  
Date Appointed: 04/02/02  
Term Expires: 02/02/07  
Position: #1

**Lloyd W.(Lew) Lewis**  
120 State Avenue N.E. #1027  
Olympia, WA 985018212

**Commissioner**  
Date Appointed: 6/18/90  
Term Expires: 4/15/2004  
Position: #3

**William Lynch**  
8845 Adams Lane N. W.  
Olympia, WA 98502  
Spouse: Jane Habegger

**Commissioner**  
Date Appointed: 9/15/86  
Term Expires: 9/15/2004  
Position: #5

**Joanne Barker**  
1900 BlackLake Blvd. SW #AA-4  
Olympia, WA 98512

**Commissioner**  
Date Appointed: 1999  
(HATC Board will renew on  
an annual basis)

Board of Commissioners meet the 4th Thursday of each month at 12:00 Noon  
in the Housing Authority's Conference Room - 503 W. 4th, Olympia.