

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

Housing Authority of the City of Lakeland, Florida

PHA Plans

5 Year Plan for Fiscal Years 2005 - 2009

Annual Plan for Fiscal Year 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: Lakeland Housing Authority

PHA Number: FL 011

PHA Fiscal Year Beginning: 1/2005

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

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

Display Locations For PHA Plans and Supporting Documents: The PHA Plans (including attachments) are available for public inspection at: (select all that apply)

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

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

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

5-YEAR PLAN
PHA FISCAL YEARS 2005 - 2009

[24 CFR Part 903.5]

A. Mission

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

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

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

To provide quality, affordable housing and self-sufficiency opportunities in an effective and professional manner.

B. Goals

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

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

PHA Goal: **Expand the supply of assisted housing through development of new units under HOPE VI, other affordable housing opportunities and acquisition of additional housing vouchers.**

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
- Renovate or modernize public housing units:.

- Demolish or dispose of obsolete public housing
 - Provide replacement public housing:
 - Provide replacement vouchers:
 - Other: (list below)
- 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)

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, gender, 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, gender, 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)

Goal #1: Having become a high performing housing authority in both the Public Housing and Section 8 programs, LHA shall sustain it.

Objective #1: Improve the accuracy of rent calculation and the sufficiency of the documentation in tenant files in both public housing and Section 8 so that quality control indicates an accuracy rate in excess of HUD program high performance standards by December 31, 2006 and sustain it thereafter.

Objective #2: Maintain a Section 8 lease-up rate of at least 98%.

Objective #3: Continue and improve task tracking / management by objectives which incorporates appropriate elements of PHAS, SEMAP, CSS Workplan and similar existing measures.

Goal #2: Continue to improve our public image through enhanced communication, coordination, and accountability with outside entities, among the staff and with residents.

Objective #1: Continue to meet monthly with the Resident Advisory Board and other residents in a variety of forums to provide the opportunity for input and feedback about agency operations.

Objective #2: Generate at least 8 positive media stories a year.

Objective #3: Deliver at least 24 talks to groups a year about the activities of LHA, including; but not limited to, governmental, private sector, public sector, civic, religious, women, and minority organizations.

Goal #3: Be the premier innovative and effective affordable housing provider in Florida.

Objective #1: Utilize LHA's role as the HOPE VI developer to implement the remaining phases by end of the HOPE VI grant period.

Objective #2: Develop staff and organizational capability so that LHA or an affiliate is prepared to manage its third-party owned rental properties by December 31, 2005.

Objective #3: Maintain eligibility to apply for additional housing choice vouchers as they become available.

Objective #4: Partner with the Lakeland Polk Housing Corporation and other housing providers to increase the availability of affordable housing in its jurisdiction by 500 units by December 31, 2009.

Objective #5: Assist at least 20 families into homeownership through the Section 8 Homeownership Program by December 31, 2009.

Objective #6: Expand the LHA business plan to include non-traditional entrepreneurial methods and practices that positively impact affordable housing in LHA's jurisdiction.

Goal #4: Implement income generating and cost saving measures while increasing operational efficiency in order to reduce LHA's dependency on HUD funding.

Objective #1: Complete implementation of the Energy and Water Cost savings programs by December 31, 2007.

Objective #2: By December 31, 2006 begin marketing LHA staffing assets to others.

Objective #3: Develop and implement a plan to obtain \$50 million of grant or leveraged funds by December 31, 2009 and ensure compliance with all grant agreements.

Objective #4: Maximize the HUD funding systems (including the Tenant Integrity Program) to better fund LHA without unduly burdening the residents.

Goal #5: Increase and encourage the self-sufficiency efforts of all residents.

Objective # 1: Assist children who reside in LHA properties to attain academic success as measured by increases in FCAT scores so that the percentage passing the FCAT equals or exceeds the Polk County average.

Objective #2: Increase the number of children using LHA educational and computer literacy programs by 20% by December 31, 2009.

Objective #3: Adult residents will be afforded the opportunity to increase their literacy skills and to continue their adult educational goals through the use of

Technical Learning Centers so that at least an additional 20% have either a high school diploma or GED by December 31, 2009.

Objective #4: LHA shall assist its non-elderly non-disabled public housing residents increase the LHA average annual household income by 35% by December 31, 2009.

Objective #5: substantially increase the number of LHA seniors and people with disabilities using LHA sponsored programs by December 31, 2009.

Objective #6: Increase the number of people participating in the LHA Public Housing Family Self-Sufficiency Program to 50 by December 31, 2009.

Goal #6: Improve employee relations and morale.

Objective #1: Improve lines of communications through staff meetings and other necessary internal communications to provide updates and progress reports about agency activities.

Objective #2: Continue to reward performance through the timely implementation of the performance evaluation / merit increase system.

Objective #3: Encourage and support staff partaking in continuing education opportunities to the greatest degree possible within funding constraints.

Annual PHA Plan
PHA Fiscal Year 2005
[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.

According to the latest HUD instructions, this section does not have to be completed.

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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

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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 (Attachment A)
- FY 2005 Capital Fund Program Annual Statement (Attachment B)
- 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 (Attachment D)
- FY 2005 Capital Fund Program 5 Year Action Plan (Attachment C)
- 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)
 - Definition of Substantial Modification (Attachment E)
 - Resident Membership on the Board (Attachment F)
 - RAB Membership (Attachment G)
 - Progress on the 5-Year Plan (Attachment H)
 - 2002 CFP P&E (Attachment I)
 - 2003 CFP Extra Round P&E (Attachment J)
 - 2003 CFP P&E (Attachment K)
 - 2004 CFP and HRF (Attachment L)
 - 2005 HRF (Attachment M)
 - Pet Policy (Attachment N)
 - Voluntary Conversion Insert (Attachment O)
 - Section 8 Homeownership Capacity Statement (Attachment P)

Supporting Documents Available for Review

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
Tab A	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
Tab B	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
Tab C	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair	5 Year and Annual Plans

List of Supporting Documents Available for Review

Applicable & On Display	Supporting Document	Applicable Plan Component
	housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	
Tab D	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
Tab E	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
Tab F	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
Tab G	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
Tab H	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 checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
Tab I	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
	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
Tab J	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
Tab K	Public housing grievance procedures <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
	Section 8 informal review and hearing procedures	Annual Plan: Grievance Procedures

List of Supporting Documents Available for Review

Applicable & On Display	Supporting Document	Applicable Plan Component
	<input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	
	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
Tab L	Approved HOPE VI Revitalization Plans 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
Tab M	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
Tab N	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
Tab O	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program <input checked="" type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
Tab P	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
Tab Q	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
	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
Tab R	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
Tab S	Dakota Park Management Plan	Public Housing/LIHTC
Tab T	Washington Ridge Management Plan	Public Housing/LIHTC
Tab U	Dakota Park Regulatory and Operating Agreement	Public Housing/LIHTC
Tab V	Washington Ridge Regulatory and Operating Agreement	Public Housing/LIHTC
Tab W	Dpark/Wridge Closing Doc's (See Ex.Dir. bookshelf #4)	Public Housing/LIHTC
Tab X	HOME Grant application	Public Housing/LIHTC
Tab Y	FHLB Afford. Hsg. Program Grant application	Public Housing/LIHTC

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
Tab Z	Washington Ridge Senior Center Management Plan	Public Housing/LIHTC
N/A	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	Afford-ability	Supply	Quality	Access-ability	Size	Location
Income <= 30% of AMI	1997	5	5	5	5	5	5
Income >30% but <=50% of AMI	1520	4	4	4	4	4	4
Income >50% but <80% of AMI	2403	3	3	3	3	3	3
Elderly	1662	4	4	4	4	4	4
Families with Disabilities	Un- known						
Black	1952	3	3	3	3	3	3
Hispanic	259	3	3	3	3	3	3
Race/Ethnicity							
Race/Ethnicity							

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

- Consolidated Plan of the Jurisdiction/s Indicate year:
 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.

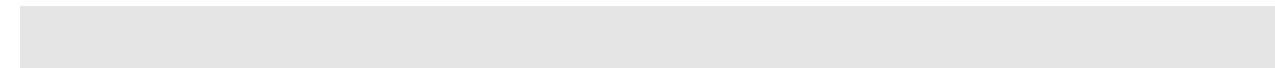
Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	170		98
Extremely low income <=30% AMI	137	80.6	
Very low income (>30% but <=50% AMI)	27	15.9	
Low income (>50% but <80% AMI)	6	3.5	
Families with children	99	58.2	
Elderly families	21	12.4	
Families with Disabilities	23	13.5	
Race/ethnicity – Black	100	58.8	
Race/ethnicity – White	69	40.6	
Race/ethnicity - Indian	1	.6	
Race/ethnicity – Asian	0	0	
Characteristics by Bed-room Size (PH Only)			
1BR	64	37.6	4
2 BR	61	35.9	71
3 BR	33	19.4	21
4 BR	9	5.3	2

5 BR	3	1.8	0
5+ BR			

Is the waiting list closed (select one)? No Yes If yes: How long has it been closed (# of months)? Since March, 2004

Does the PHA expect to reopen the list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even if generally closed? No Yes



Housing Needs of Families on the Waiting List			
Waiting list type: (select one) <input checked="" type="checkbox"/> Section 8 tenant-based assistance <input type="checkbox"/> Public Housing <input type="checkbox"/> Combined Section 8 and Public Housing <input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional) If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	68		175
Extremely low income <=30% AMI	55	80.9	
Very low income (>30% but <=50% AMI)	12	17.6	
Low income (>50% but <80% AMI)	1	1.5	
Families with children	59	86.8	
Elderly families	7	10.3	
Families with Disabilities	2	2.9	
White	25	36.8	
Black	42	61.8	
Native American	1	1.5	
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes If yes: How long has it been closed (# of months)? January, 2004 except for FUP Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			

C. Strategy for Addressing Needs

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

(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. **See Supporting Document: HOPE VI Revitalization Plan.**
- 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)

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select all that apply

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

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

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

Maintain designation of Cecil Gober for elderly occupancy.

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)

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.

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2005 grants)		
a) Public Housing Operating Fund	1,032,534	
b) Public Housing Capital Fund	605,000	
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	6,950,000	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants	500,000	
h) Community Development Block Grant	0	
i) HOME	0	
Other Federal Grants (list below)		
RHF Funds	200,000	Replacement Units

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
Self-Sufficiency Coordinator	49,000	Section 8 Supportive Services
2. Prior Year Federal Grants (unobligated funds only) (list below)		
HOPE VI	6,050,000	Capital Improvements
CFP03	725,000	Capital Improvements
CFP04	605,000	Capital Improvements
3. Public Housing Dwelling Rental Income	325,000	Public Housing Operations
4. Other income (list below)		
Administrative Reserve Interest	15,000	Section 8 Tenant Based Assistance
Investment Income	22,440	Public Housing Operations
Entrepreneurial Activities	57,000	Public Housing Operations
4. Non-federal sources (list below)		
Program Income	\$250,000	Public Housing Capital Improvements
Total resources	\$17,385,974	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.7 9 (c)]

A. Public Housing

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

(1) Eligibility

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

- When families are within a certain number of being offered a unit: (state number)
- When families are within a certain time of being offered a unit: (state time)
- Other: (describe) **When they get near the top of the waiting list or immediately if there is no waiting list.**

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 (HOPE VI sites only)
- Other (describe)

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

- PHA main administrative office
- PHA development site management office (mgmt. offices at H6 developments)
- 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 – Not Applicable**

1. How many site-based waiting lists will the PHA operate in the coming year? **3 Dakota Park, Washington Ridge, Scattered Sites**

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**

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 **If a unit is refused for other than a valid reason, they are not housed for six months**
- Two
- Three

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

- 4 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)

Lived in Washington Park or Lake Ridge Homes after August, 1999, or Dakota Park after January 2002 and who desire to move into HOPE VI sponsored replacement rental housing

A qualified purchaser of a HOPE VI sponsored Homeownership unit

Absence of a Proscribed Crime Preference (see ACOP glossary)

Absence of Misdemeanors

Voter Registration

Enrolled in School (school-aged children)

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)

- 5 Victims of domestic violence
- Substandard housing
- Homelessness
- High rent burden

Other preferences (select all that apply)

- 3 Working families and those unable to work because of age or disability
- Veterans and veterans' families
- 5 Residents who live and/or work in the jurisdiction
- 5 Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs

Victims of reprisals or hate crimes

Other preference(s) (list below)

1 Lived in Washington Park or Lake Ridge Homes after August, 1999, or Dakota Park after January 2002 and who desire to move into HOPE VI sponsored replacement rental housing

- 1 A qualified purchaser of a HOPE VI sponsored Homeownership unit**
- 2 Absence of Proscribed Crime Preference (see ACOP Glossary)**
- 4 Absence of Misdemeanors**
- 5 Voter Registration**

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

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

If yes, list these developments as follows:

Deconcentration Policy for Covered Developments
--

Development Name:	Number of Units	Explanation (if any) [see step 4 at §903.2(c)(1)(iv)]	Deconcentration policy (if no explanation) [see step 5 at §903.2(c)(1)(v)]
		All sites are at less than 30% of AMI	

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)

See Section 4.7 of the Section 8 Administrative Plan for various Grounds for Denial.

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):

Forwarding address of departing tenant when there is a balance on the tenant's account.

(2) Waiting List Organization

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

- None
 Federal public housing
 Federal moderate rehabilitation
 Federal project-based certificate program
 Other federal or local program (list below)

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

- 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:

Hospitalization or medical hardship.
Hardship due to shortage of family units.
Other valid reason.

(4) Admissions Preferences

a. Income targeting

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

b. Preferences

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

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

Former Federal preferences

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

Lived in Washington Park or Lake Ridge Homes after August, 1999, or Dakota Park after January 2002 and who desire to move into HOPE VI sponsored replacement rental housing

A qualified purchaser of a HOPE VI sponsored Homeownership unit

Not currently living in standard, affordable housing

Absence of a Proscribed Crime Preference (see ACOP glossary)

Absence of Misdemeanors

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

Other preference(s) (list below)

1. Lived in Washington Park or Lake Ridge Homes after August, 1999, or Dakota Park after January 2002 and who desire to move into HOPE VI sponsored replacement rental housing

1. A qualified purchaser of a HOPE VI sponsored Homeownership unit

2. Not currently living in standard, affordable housing

3. Absence of a Proscribed Crime Preference (see ACOP glossary)

4. Absence of Misdemeanors

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)

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 Partner Agency: State Department of Children & Families, the One-Stop Shop and also their sub-contractor.

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

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

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

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

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

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

For the earned income of a previously unemployed household member

For increases in earned income

Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

Fixed percentage (other than general rent-setting policy)

If yes, state percentage/s and circumstances below:

For household heads

For other family members

For transportation expenses

For the non-reimbursed medical expenses of non-disabled or non-elderly families

Other (describe below)

e. Ceiling rents

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

Yes for all developments

Yes but only for some developments

No

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

For all developments

For all general occupancy developments (not elderly or disabled or elderly only)

For specified general occupancy developments

For certain parts of developments; e.g., the high-rise portion

For certain size units; e.g., larger bedroom sizes

Other (list below)

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

Market comparability study

Fair market rents (FMR)

95th percentile rents

75 percent of operating costs

100 percent of operating costs for general occupancy (family) developments

Operating costs plus debt service

- The “rental value” of the unit
- Other (list below)

f. Rent re-determinations:

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

- Never
- At family option
- Any time the family experiences an income increase - **The rent only changes if the increase is at least \$250 a month.**
- 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)

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)

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

Success rates of assisted families

Rent burdens of assisted families

Other (list below)

(2) Minimum Rent

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

\$0

\$1-\$25

\$26-\$50

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

5. Operations and Management:

[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.)

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	324	24
Section 8 Vouchers	745	125
Section 8 Certificates		
Section 8 Mod Rehab		
Welfare to Work	373	60
Family Unification	100	31
Disabled	25	2
HOPE VI	343	0
ROSS	324	24

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)

Admissions and Continued Occupancy Policy

Human Resource Policy

Investment Policy

Public Presentations During Commission Meetings

Procurement Policy

Grievance Policy

Parking Policy

Trash Disposal Policy

Records Retention Policy

Safety Policy

Dakota Park Management Plan

Washington Ridge Management Plan

(2) Section 8 Management: (list below)

Administrative Plan

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

Exemptions from component 6: High performing PHAs are not required to complete component 6. 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

[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 B

-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 C

-or-

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

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

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

Yes No: a) Has the PHA received a HOPE VI revitalization grant? (if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary)

b) Status of HOPE VI revitalization grant (complete one set of questions for each grant)

1. Development name: **Washington Ridge**

2. Development (project) number: **FL011-001, FL011-003, and FL011-005**

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: **Washington Ridge Rentals and Greater Lakeland (see Revitalization Plan).**

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:

Acquiring lots and in-fill development in the Paul A. Diggs neighborhood pursuant to HOPE VI Implementation; Begin acquisition/new development of units in Greater Lakeland area pursuant to HOPE VI Implementation; Rehabilitation, and homeownership units at Magnolia Pointe (formerly Lakeview Gardens).

8. Demolition and Disposition

[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.)

Demolition/Disposition Activity Description
1a. Development name: Washington Ridge
1b. Development (project) number: FL011- 01 and 03
2. Activity type: Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one) Approved <input checked="" type="checkbox"/> for 55 homeownership lots Submitted, pending approval () Planned application <input checked="" type="checkbox"/> (for commercial development)
4. Date application approved, submitted, or planned for submission: 10/03 and later in 05
5. Number of units affected:
6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 12/31/03 b. Projected end date of activity: 12/31/06

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

[24 CFR Part 903.7 9 (i)]

Exemptions from Component 9; 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.

Designation of Public Housing Activity Description	
1a. Development name:	Cecil Gober
1b. Development (project) number:	FL-011-006
2. Designation type:	Occupancy by only the elderly Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input checked="" type="checkbox"/>
3. Application status (select one)	Approved; included in the PHA’s Designation Plan <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission:	05/01/2003
5. If approved, will this designation constitute a	<input type="checkbox"/> New Designation Plan <input checked="" type="checkbox"/> Revision of a previously approved Designation Plan?
6. Number of units affected:	33 elderly and 4 disabled
7. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

Designation of Public Housing Activity Description	
1a. Development name:	Washington Ridge
1b. Development (project) number:	FL-011-Unknown (Mid-rise portion –78 units)
2. Designation type:	

Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA's Designation Plan <input type="checkbox"/> Submitted, pending approval <input checked="" type="checkbox"/> Planned application
4. Date this designation approved, submitted, or planned for submission: 12/17/2003
5. If approved, will this designation constitute a <input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously approved Designation Plan?
7. Number of units affected: 30 7. Coverage of action (select one) <input type="checkbox"/> <input checked="" type="checkbox"/> Part of the development Total development

Designation of Public Housing Activity Description
1a. Development name: Washington Ridge 1b. Development (project) number: FL-011-Unknown (duplex portion – 30 units)
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 checked="" type="checkbox"/>
3. Application status (select one) Approved; included in the PHA's Designation Plan <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission 12/17/2003
5. If approved, will this designation constitute a <input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously approved Designation Plan?
8. Number of units affected: 12 7. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development Total development

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

Exemptions from Component 10; 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.

Conversion of Public Housing Activity Description	
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)	

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

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

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

Exemptions from Component 11A: 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.)

Public Housing Homeownership Activity Description (Complete one for each development affected)
1a. Development name: Magnolia Pointe
1b. Development (project) number: FL-011-005
2. Federal Program authority: <input type="checkbox"/> HOPE I <input checked="" 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 checked="" 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: (01/08/2002)
5. Number of units affected: 44
6. Coverage of action: (select one) <input type="checkbox"/> Part of the development

Total development

B. Section 8 Tenant Based Assistance

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

2. Program Description:

a. Size of Program

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

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

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

b. PHA-established eligibility criteria

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

If yes, list criteria below:

12. PHA Community Service and Self-sufficiency Programs:

[24 CFR Part 903.7 9 (1)]

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

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

Yes No: Has the PHA 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? 27/04/99

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)

b. Economic and Social self-sufficiency programs

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

Services and Programs				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)
FSS	129	Self Selected	Main Office	Both
HOPE VI CSS	343	Residence	West Lake Office	Public Housing

(2) Family Self Sufficiency program/s

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2003 Estimate)	Actual Number of Participants (As of: 06/22/2004)
Public Housing	0	15

Section 8	65	84
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- b. Yes No: If the PHA is not maintaining the minimum program size required by HUD, does the most recent FSS Action Plan address the steps the PHA plans to take to achieve at least the minimum program size?
If no, list steps the PHA will take below:

C. Welfare Benefit Reductions

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

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

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

13. PHA Safety and Crime Prevention Measures:

[24 CFR Part 903.7 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 2004PHDEP 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 2003 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:

[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? **Despite providing the Plan to the RAB on July 2, 2004, the RAB comments have not been received as of the submission deadline date. The Housing Authority is committed to reviewing and acting on the comments when they are received as if they have been received in a timely manner. The Authority is proud of its strong relationship with the RAB.**

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

Attached at Attachment

Provided below:

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

Considered comments, but determined that no changes to the PHA Plan were necessary.

The PHA changed portions of the PHA Plan in response to comments

List changes below:

Other: (list below) To be determined after reviewing comments received on 10-8-03

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

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

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

3. Description of Resident Election Process

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

Candidates were nominated by resident and assisted family organizations

Candidates could be nominated by any adult recipient of PHA assistance

Self-nomination: Candidates registered with the PHA and requested a place on ballot

Other: (describe):

b. Eligible candidates: (select one)

Any recipient of PHA assistance

Any head of household receiving PHA assistance

Any adult recipient of PHA assistance

Any adult member of a resident or assisted family organization

Other (list)

c. Eligible voters: (select all that apply):

All adult recipients of PHA assistance (public housing and section 8 tenant-based assistance)

Representatives of all PHA resident and assisted family organizations

Other (list)

C. Statement of Consistency with the Consolidated Plan

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

1. Consolidated Plan jurisdiction: (provide name here): **City of Lakeland, Florida and Polk County, Florida**

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

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

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

In 1999, the Lakeland Housing Authority (LHA) received HUD approval for a \$21,842,801 grant under the HOPE VI program for the revitalization of the Paul A. Diggs neighborhood into a new community known as Washington Ridge Renaissance. Overall, the HOPE VI effort will provide approximately 305 new units of rental housing and 89 new units of homeownership, as well as 40 rehabilitated units of rental housing and 44 rehabilitated units of homeownership. LHA is developing this HOPE VI project in partnership with The Communities Group (TCG), a Washington, DC-based organization that is currently serving as developer on seven HOPE VI sites in the south and east.

On-Site

In 2002, LHA used about \$1.2 million in HOPE VI funds for the demolition of the 380 public housing units (of which 220 were at Washington Park and 160 were at Lake Ridge). Rodda Construction served as the construction manager for the demolition, and Cross Environmental Services and Trans-Con were the primary subcontractors. Minority and women-owned business enterprises received 67% of the contract amounts awarded by Rodda for the demolition.

The City of Lakeland provided a \$2 million grant for the infrastructure improvements. This contribution allowed Rodda Construction and its subs to begin the infrastructure work in October, 2002.

In December, 2002, Renaissance at Washington Ridge, Ltd., LLLP, the ownership entity created to take advantage of the federal low income housing tax credit program in order to develop the on-site rental phase, closed on the financing that will allow development of 196 affordable rental units. The financing includes a \$1,583,900 loan from SunTrust Bank, \$10,318,368 in equity from CDC Renaissance, LLC (an affiliate of SunTrust Community Development Corp.), \$7,129,370 in HOPE VI funds from LHA, and the above-mentioned City contribution of \$2,000,000. Construction of this phase began in late December. Minority and women-owned business enterprises received 26% of the contract amounts awarded by Rodda. The 196 units will include a 78-unit senior building at Washington Park, 89 additional rental units in a mix of 2BR, 3BR, and 4 BR at Washington Park, and 29 rental units in a mix of 2BR, 3BR, and 4 BR at Lake Ridge. Each dwelling unit will contain living, dining, and kitchen areas and new kitchen appliances, as well as energy efficient air conditioning units, cable hookup, and other modern amenities. Of the 196 units, 109 will be public housing replacement units.

In the first half of 2004, LHA will begin construction of the 55 homeownership units at Washington Park (15) and Lake Ridge (40). First mortgage financing will come through a consortium of local banks and mortgage institutions developed by Keystone Challenge Fund. LHA will assist with HOPE VI funds to make the houses affordable to families whose incomes are at or below 80% of area median income. Also, the City has agreed to provide up to \$3,500 per buyer in down payment and closing cost assistance. In addition, LHA and TCG successfully applied in October, 2002, for \$800,000 in HOME funds from FHFC to assist in development of these houses. Lakeland Polk Housing Corporation (LPHC), a 501(c)(3) affiliate of LHA, was the applicant for the HOME funds--LPHC qualified as a Community Housing Development Organization (CHDO) for which FHFC has a set-aside of HOME funds. LPHC will act as the developer of these 55 units.

Booker T. Washington Park

LHA contributed \$100,000 of the HOPE VI funds to the City to assist in the refurbishing of the park.

Dakota Park

In March, 2002, Dakota Park Limited Partnership, the entity created to use the tax credit program at Dakota Park, closed on the financing that

allowed rehabilitation of the five buildings and construction of one new building. The financing includes a \$500,000 loan from SunTrust Bank, \$1,997,487 in equity from CDC Dakota Park, LLC (an affiliate of SunTrust Community Development Corp), \$714,591 in HOPE VI funds from LHA, and \$120,000 from Bank of America through the Federal Home Loan Bank of Atlanta's Affordable Housing Program. In addition, the City had previously provided \$125,000 in grant funds that financed various repairs to the apartments in 2000 and 2001. Rodda Construction began the renovations in March, 2002, and all six buildings received certificates of occupancy in December, 2002. Minority and women-owned business enterprises received 28% of the contracts amounts awarded by Rodda at Dakota Park. To date all of the 40 units are occupied. Of the 40 units, 20 are public housing replacement units. Lakeland Polk Housing Corporation (LPHC) serves as the managing general partner of Dakota Park Limited Partnership.

Magnolia Pointe

Beginning in 1997, LHA received a series of grants totaling \$3,200,000 from HUD's Modernization program to allow total renovation of Lakeview Gardens (as these forty-four units were then known). After receipt of the HOPE VI grant in 1999, LHA and TCG agreed to sell the units as condominiums upon completion of the renovations. The work is now complete, and LHA has received HUD approval to sell the units. With recent approval by the State of the condominium regime documents, LHA will sell the condos to families with incomes at or below 80% of area median. Funding will include affordable first mortgage loans through the consortium of local banks mentioned above, \$515,000 in HOPE VI funds, and up to \$3,500 per buyer in down payment and closing cost assistance from the City.

Greater Lakeland

With the help of the Community Development department, LHA is presently looking for a site outside of the Diggs neighborhood for the final rental phase of the HOPE VI. This site was the subject of an application for tax credits in 2003.

The LHA is not designated as "troubled" by HUD, nor is it performing poorly.

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

As can be seen by the above, the City of Lakeland has been very generous in cooperating with the LHA. Polk County has not traditionally gotten involved with LHA, because most of LHA's properties are located within the corporate city limits of Lakeland.

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

Attachment A: Deconcentration

10.4 DECONCENTRATION POLICY

It is the Lakeland Housing Authority's policy to provide for deconcentration of poverty and encourage income mixing by bringing higher income families into lower income developments and lower income families into higher income developments. Toward this end, we will skip families on the waiting list to reach other families with a lower or higher income. We will accomplish this in a uniform and non-discriminating manner.

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

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

10.5 DECONCENTRATION INCENTIVES

The Lakeland Housing Authority may offer one or more incentives to encourage applicant families whose income classification would help to meet the deconcentration

Attachment B

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

PHA Name:Lakeland Housing Authority	Grant Type and Number Capital Fund Program Grant No: FL14P011502-05 Replacement Housing Factor Grant No:	Federal FY of Grant: 2005
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending: Final Performance and Evaluation Report

Lin e No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	60000			
3	1408 Management Improvements	5500			
4	1410 Administration	65000			
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	32000			
8	1440 Site Acquisition	1000			
9	1450 Site Improvement	22000			
10	1460 Dwelling Structures	334658			
11	1465.1 Dwelling Equipment— Nonexpendable	1000			
12	1470 Nondwelling Structures	1000			
13	1475 Nondwelling Equipment	9000			
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	5000			

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

PHA Name:Lakeland Housing Authority	Grant Type and Number Capital Fund Program Grant No: FL14P011502-05 Replacement Housing Factor Grant No:	Federal FY of Grant: 2005
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Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending: Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
18	1499 Development Activities	1000			
19	1501 Collateralization or Debt Service				
20	1502 Contingency	10000			
21	Amount of Annual Grant: (sum of lines 2 – 20)	547158			
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115205 Replacement Housing Factor Grant No: FL29P011xxx			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
1406 PHA-WIDE	OPERATIONS							
	OPERATING SUBSIDY	1406	>20%	60,000				
	TOTAL 1406			60,000				
1408 PHA-WIDE	MANAGEMENT IMPROVEMENTS							
	-DEVELOP & UPDATE AGENCY PLAN	1408	LUMP SUM	3000				
	-VACANCY REDUCTION	1408	LUMP SUM	500				
	-DEVELOP RESIDENT INITIATIVES	1408	LUMP SUM	500				
	-COMPUTER SOFTWARE	1408	LUMP SUM	500				
	-GRANT WRITING	1408	LUMP SUM	500				
	-SECURITY CAMERA SYSTEM	1408	LUMP SUM	500				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115205 Replacement Housing Factor Grant No: FL29P011xxx			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	TOTAL 1408			5,500				
1410 PHA-WIDE	ADMINISTRATION							
	-FACILITIES DIRECTOR-25%, MAINTENANCE SUP 50%, OPERATIONS SUPPORT ASSOC.-50%, PURCHASING AGENT-35%	1410	LUMP SUM	34000				
	-EMPLOYEE BENEFITS	1410	LUMP SUM	11,000				
	-PRORATION OF ADMIN SUPPORT	1410	LUMP SUM	20,000				
	TOTAL 1410			65,000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115205 Replacement Housing Factor Grant No: FL29P011xxx			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
1430 PHA-WIDE	FEES & COSTS							
	-INSPECTOR SALARY 35%	1430	LUMP SUM	19000				
	-SECURITY CAMERA MAINTENANCE CONTRACT	1430	LUMP SUM	500				
	-A/E FEES	1430	LUMP SUM	10000				
	-SUNDRY PLANNING AND IN-HOUSE DESIGN	1430	LUMP SUM	2500				
	TOTAL 1430			32000				
1450 PHA-WIDE	SITE IMPROVEMENTS							
	-TREE TRIMMING	1450	LUMP SUM	2000				
	-SIDEWALK REPAIR	1450	LUMP SUM	2000				
	-EROSION CONTROL	1450	LUMP SUM	1000				
	-FENCING	1450	LUMP SUM	1000				
	-RESEAL/PAVING REPAIRS	1450	LUMP SUM	1000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115205 Replacement Housing Factor Grant No: FL29P011xxx			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	-DRAINAGE REPAIR/GUTTERS	1450	LUMP SUM	1000				
	-LANDSCAPING	1450	LUMP SUM	2000				
	-SIGNAGE	1450	LUMP SUM	1000				
	-PLAYGROUND IMPROVEMENTS	1450	LUMP SUM	1000				
FL11-7	WATERLINE REPLACEMENT	1450	LUMP SUM	10000				
	TOTAL 1450			22000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115205 Replacement Housing Factor Grant No: FL29P011xxx			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
1460 PHA-WIDE	DWELLING STRUCTURES							
	-EXTERIOR PAINTING	1460	LUMP SUM	1000				
	-PRESSURE WASHING	1460	LUMP SUM	500				
	-EXTERIOR /SCREEN DOORS	1460	LUMP SUM	500				
	-SECURITY WINDOW SCREENS	1460	LUMP SUM	500				
	-EXTERIOR MASONARY REPAIRS	1460	LUMP SUM	500				
	-SOFFET FASCIA/GABLE REPAIRS	1460	LUMP SUM	500				
	-FIRE SUPPRESSION SYSTEM	1460	LUMP SUM	500				
	--MISC REPAIRS PHAS	1460	LUMP SUM	1000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115205 Replacement Housing Factor Grant No: FL29P011xxx			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL 11-2 WESTLAKE	-COMPREHENSIVE MODERNIZATION TO INCLUDE-MILDEW CONTROL, CENTRAL HVAC, DRYER/VENT/WIRING , RANGE HOODS WITH FIRE SUPPRESSION UNITS	1460	LUMP SUM	1000				
FL11-5 LAKEVIEW GARDENS/A KA MAGNOLIA POINTE	-INTERIOR AND EXTERIOR FINISHES FRESHENED UP AS NECESSARY FOR CONVERSION	1460	LUMP SUM	3000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115205 Replacement Housing Factor Grant No: FL29P011xxx			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-4 WESTLAKE ADDITION	EXTERIOR PAINT	1460	LUMP SUM	25000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115205 Replacement Housing Factor Grant No: FL29P011xxx			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-6 CECIL GOBER & JOHN WRIGHT	-COMPREHENSIVE MODERNIZATION TO INCLUDE UTILITY DOORS, EXTERIOR WINDOWS, KITCHEN AND BATH MODERNIZATION, VCT FLOORING REPLACEMENT, WATER SUPPLY LINES, EMERGENCY CALL SYSTEM (CECIL GOBER), DRYER VENTS, CENTRAL HVAC, INTERIOR 7 EXTERIOR DOORS, ATTIC INSULATION, REPAIR OF TERMITE DAMAGE, DRYWALL REPLACEMENT, UPGRADED ELECTRICAL SERVICE (REPLACE ALUMINUM WIRE, PANEL, AND DEVICES) (FORCE ACCOUNT WORK)	1460	LUMP SUM	1000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115205 Replacement Housing Factor Grant No: FL29P011xxx			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL 11-7 PAUL COLTON 7 BONNET SHORES	-COMPREHENSIVE MODERNIZATION TO INCLUDE UTILITY DOORS, EXTERIOR WINDOWS, KITCHEN AND BATH MODERNIZATION, VCT FLOORING REPLACEMENT, WATER SUPPLY LINES, DRYER VENTS, CENTRAL HVAC, INTERIOR/EXTERIOR DOORS, ATTIC INSULATION, REPAIR OF TERMITE DAMAGE, DRYWALL REPLACEMENT, UPGRADED ELECTRICAL SERVICE (REPLACE ALUMINUM WIRE, PANEL AND DEVICES) (FORCE ACCOUNT)	1460	LUMP SUM	300658				
	TOTAL 1460			334658				
1465.1 PHA-WIDE	DWELLING EQUIPMENT							
	-APPLIANCE REPLACEMENT	1465	LUMP SUM	1000				
	TOTAL 1465.1			1000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115205 Replacement Housing Factor Grant No: FL29P011xxx			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115205 Replacement Housing Factor Grant No: FL29P011xxx			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
1470 PHA-WIDE	NON-DWELLING EQUIPMENT							
	-RENOVATION OF COMMUNITY BUILDINGS	1470	LUMP SUM	1000				
	TOTAL 1470			1000				
1475 PHA - WIDE	NON DWELLING EQUIPMENT							
	-REPLACE OFFICE FURNITURE AND EQUIPMENT	1475	LUMP SUM	500				
	-COMMON AREA FURNITURE AND FIXTURES	1475	LUMP SUM	500				
	-PURCHASE MAINTENANCE VEHICLES	1475	LUMP SUM	6000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115205 Replacement Housing Factor Grant No: FL29P011xxx			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	-REPLACE EQUIPMENT INCLUDING HANDTRUCK,FLOOR BUFFERS,WET VACS,SPRAY PAINT EQUIP.,CHAIN SAWS, BACKPACK SPRAYERS, HVAC EQUIP.,DRYWALL SPRAY TEXTURE MACHINE.	1475	LUMP SUM	2000				
	TOTAL 1475			9000				
1495.1 PHA-WIDE	RELOCATION COSTS							
	-RELOCATION	1495 .1	LUMP SUM	5000				
	TOTAL RELOCATION			5000				
1499 PHA-WIDE	DEVELOPMENT ACTIVITIES							
	-DEVELOPMENT	1499	LUMP SUM	1000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115205 Replacement Housing Factor Grant No: FL29P011xxx			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	TOTAL 1499			1000				
1502 PHA-WIDE	CONTINGENCY							
	-CONTINGENCY	1502		10000				
	TOTAL 1502			10000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115205 Replacement Housing Factor Grant No: FL29P011xxx			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	

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

PHA Name:LAKELAND HOUSING AUTHORITY		Grant Type and Number Capital Fund Program No: FL 20P0115205 Replacement Housing Factor No: FL29P011XXX					Federal FY of Grant: 2005	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates	
	Original	Revised	Actual	Original	Revised	Actual		
1406	12/07			6/09				
1408	12/07			6/09				
1410	12/07			6/09				
1430	12/07			6/09				
1450	12/07			6/09				
1460	12/07			6/09				
1465.1	12/07			6/09				
1470	12/07			6/09				
1475	12/07			6/09				
1495.1	12/07			6/09				
1499	12/07			6/09				
1502	12/07			6/09				

Capital Fund Program Five-Year Action Plan

Part I: Summary

PHA Name LAKELAND HOUSING AUTHORITY		<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:			
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant:2006 PHA FY: 2006	Work Statement for Year 3 FFY Grant:2007 PHA FY: 2007	Work Statement for Year 4 FFY Grant: 2008 PHA FY:2008	Work Statement for Year 5 FFY Grant: 2009 PHA FY: 2009
PHA-WIDE	Annual Statement	210630	252756	257811	262967
WESTLAKE 11-2		1020	1224	1248	1273
WESTLAKE ADDITION 11-4		5000	6000	6120	6242
LAKEVIEW GARDENS/MAGNO LIA POINTE 11-5		3060	-0-	-0-	-0-
CECIL GOBER/JOHN WRIGHT 11-6		1020	1224	417003	425343
PAUL COLTON/BONNET SHORES 11-7		337371	408827	1250	1276
CFP Funds Listed for 5-year planning					
		597,956	717,547	731,898	746,535
Replacement Housing Factor Funds		775,560	791,071	798,982	814,961

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

Activities for Year 1	Activities for Year :2___ FFY Grant:2006 PHA FY: 2006			Activities for Year: _3___ FFY Grant: 2007 PHA FY:2007		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	PHA-WIDE	OPERATIONS	60000	PHA-WIDE	OPERATIONS	72000
Annual		MANAGEMENT IMP	5500		MANAGEMENT IMP	6600
Statement		ADMINISTRATION	6500		ADMINISTRATION	7800
		FEES & COSTS	32000		FEES & COSTS	32000
		SITE IMPROVEMENTS	23000		SITE IMPROVEMENTS	27600
		DWELLING STRT	5610		DWELLING STRT	6732
		DWELLING EQP	1020		DWELLING EQP	1224
		NONDWELLING STRT	1020		NONDWELLING STRT	1224
		NONDWELLING EQP	9180		NONDWELLING EQP	11016
		RELOCATION COST	5100		RELOCATION COST	6120
		MOD FOR DEV	1020		MOD FOR DEV	1224
		CONTINGENCY	10200		CONTINGENCY	12240
	FL 11-2 WESTLAKE	DWELLING IMP	1020	FL 11-2 WESTLAKE	DWELLING IMP	1224
	FL 11-4 WESTLAKE ADDITION	DWELLING IMP	5000	FL 11-4 WESTLAKE ADDITION	DWELLING IMP	6000
	FL 11-5LAKEVIEW GARDENS/AKA MAGNOLIA POINTE	DWELLING IMP	3060	FL 11-5 LAKEVIEW GARDENS/AKA MAGNOLIA POINTE	DWELLING IMP	-0-

	FL 11-6 CECIL GOBER & JOHN WRIGHT	COMPREHENSIVE MODERNIZATION INCLUDING INTERIOR & EXTERIOR DOORS AND WINDOWS, KITCHEN AND BATH CABINETS, NEW WATER SUPPLY SYSTEM WITH INDIVIDUAL METERS AND CPVC PIPING, NEW PLUMBING FIXTURES, TUB SURROUNDS, NEW VCT FLOORING, DRYWALL,FRAMING AND TRIM REPAIRS FROM TERMITE DAMAGE, R-30 ATTIC INSULATION, REPLACEMENT HVAC DUCT SYSTEM, NEW HVAC SYSTEM, DRYER VENTS,REPLAC MAIN ELEC SERVICE AND ALL ALUMINUM WIRING AND DEVICES (fFORCE ACCOUNT)	1020	FL 11-6 CECIL GOBER & JOHN WRIGHT	SAME AS YEAR 2	1224
	FL 11-7 PAUL COLTON & BONNET SHORES	COMPREHENSIVE MODERNIZATION WITH THE SAME SCOPE AS FL11-6	377,226	FL 11-7 PAUL COLTON & BONNET SHORES	COMPREHENSIVE MODERNIZATION WITH THE SAME SCOPE AS FL 11-6	455,343
	Total CFP Estimated Cost		\$			\$

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

Activities for Year :_4__ FFY Grant:2008 PHA FY: 2008			Activities for Year: _5__ FFY Grant: 2009 PHA FY: 2009		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
PHA -WIDE	OPERATIONS	73440	PHA-WIDE	OPERATIONS	74909
	MANAGEMENT IMP	6732		MANAGEMENT IMP	6867
	ADMINISTRATION	7956		ADMINISTRATION	8115
	FEES & COSTS	39168		FEES & COSTS	39951
	SITE IMPROVEMENTS	28152		SITE IMPROVEMENTS	28715
	DWELLING STRUCTURES	6867		DWELLING STRUCTURES	7004
	DWELLING EQUIP	1248		DWELLING EQUIP	1273
	NONDWELLING STRUCTURES	1248		NONDWELLING STRUCTURES	1273
	NONDWELLING EQUIPMENT	11236		NONDWELLING EQUIP	11461
	RELOCATION COSTS	6242		RELOCATION COSTS	6367
	MOD FOR DEV	1248		MOD FOR DEV	1272
	CONTINGENCY	12485		CONTINGENCY	12735
FL 11-2 WESTLAKE	DWELLING IMP	1248	FL 11-2 WESTLAKE	DWELLING IMP	1273
FL 11-4 WESTLAKE ADDITION	DWELLING IMP	6120	FL 11-4 WESTLAKE ADDITION	DWELLING IMP	6242
FL 11-5 LAKEVIEW GARDENS/AKA MAGNOLIA POINTE	DWELLING IMP	-0-	FL 11-5 LAKEVIEW GARDENS/AKA MAGNOLIA POINTE	DWELLING IMP	-0-

FL 11-6 CECIL GOBER & JOHN WRIGHT	COMPREHENSIVE MODERNIZATION SAME SCOPE AS YEAR 2	465,469	FL 11-6 CECIL GOBER & JOHN WRIGHT	CMPREHENSIVE MODERNIZATION SAME SCOPE AS YEAR 2	474,778
FL 11-7 PAUL COLTON & BONNET SHORES	COMPREHENSIVE MODERNIZATION SAME SCOPE AS YEAR 2	1250	FL 11-7 PAUL COLTON & BONNET SHORES	COMPREHENSIVE MODERNIZATION SAME SCOPE AS YEAR 2	1276
Total CFP Estimated Cost		\$			\$

Attachment E

Definition

Substantial deviations or significant amendments or modifications are defined as discretionary changes in the plans or policies of the housing authority that fundamentally change the mission, goals, objectives, or plans of the agency and which requires formal approval of the Board of Commissioners.

Required Attachment _F_: Resident Member on the PHA Governing Board

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

A. Name of resident member(s) on the governing board: **Tonda Jiles**

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

- Elected
- Appointed

C. The term of appointment is (include the date term expires): **May, 2005**

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

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

B. Date of next term expiration of a governing board member:

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

Required Attachment ___G___: Membership of the Resident Advisory Board or Boards

List members of the Resident Advisory Board or Boards: (If the list would be unreasonably long, list organizations represented or otherwise provide a description sufficient to identify how members are chosen.)

Stella Black, President

Lilly Brown

Tonda Jiles

Dorothy Hundley

Nita McGee

Attachment H

GOAL #1: BECOME A HIGH-PERFORMING HOUSING AUTHORITY IN BOTH THE PUBLIC HOUSING AND SECTION 8 PROGRAMS BY DECEMBER 31, 2004 AND SUSTAIN IT THEREAFTER.

Objective #1:

E. Haynes

Improve rent-up and tenant collections to the point that the PHA'S grade is an "A," with the exception of collections lost due to the tenant integrity program by December 31, 2004.

Better organization and communication and timely input of receipts has led to more accurate and prompt collections. The Director of Resident Services monitors and tracks daily accounts receivable activities. The Property managers are now responsible to report monthly to provide summaries on all Tenant accounts that are over 60 days delinquent to avoid rollover of additional charges. This process has made the Property Managers more collection conscious, and as a result, rent collection has improved each of the last four months. Implementation of SWICA to monitor household income will be reviewed periodically, especially for Tenants on zero income. The property managers continue to fall short of rent collection goal of 90%. We are at the 78 percentile, which includes several account balances that is in the process of being written-off. Staff is very optimistic about attaining this goal.

Objective #2:

S.Glass, C. Fink

Improve the Section 8 lease-up rate to at least 98% by December 31, 2004.

A fund-utilization spread sheet was created to keep us on track. The spreadsheet is updated monthly. The average lease-up rate at the end of May 2004 was 96%. In our effort to have a lease-up rate of 98% by December 31, 2004, 176 vouchers will be offered to applicants on our waiting list during the month of June 2004.

Objective #3:

D. Sebastian, C. Dolmseth, S. Zegel

Continue and improve Task Tracking/management by objectives, which incorporates appropriate elements of PHAS, SEMAP, CSS Work plan, and similar existing measures.

Diane has been provided with a list of all reporting requirements for each department and the dates are being placed on an LHA-wide calendar. Directors will also provide activities to Diane for input into this calendar, as well as, audit due dates. This streamlining will make tracking important milestones more efficient. A Director of Special Projects has been hired who will assist in establishing performance measures tied to the strategial plan goals and objectives. This system will be in place by January 1, 2005.

Objective #4:

E. Gainers, M. Yawn

Encourage staff to complete training/certification programs relevant to their areas of responsibility.

Staff is notified as classes become available through HTVN, NAHRO, LHA and other resources. The first part of 2004 was full of training/certification programs for both existing and new staff members. Eleven staff took certification exams with nine passing. these certification exams were in the following areas: HR Generalist, FSS Coordinator and Public Housing Manager. Between January and July 51 seats were filled in the HTVN sessions by the Maintenance staff. From January to July, the following HTVN slots were filled by each department:

<i>Maintenance</i>	<i>51</i>	<i>Finance</i>	<i>3</i>
<i>Section 8</i>	<i>15</i>	<i>Human Resources</i>	<i>1</i>
<i>Public Housing</i>	<i>4</i>	<i>CSS</i>	<i>8</i>
<i>OST</i>	<i>12</i>	<i>Facilities</i>	<i>2</i>

Monthly supervisor training has begun and seems to be working quite well in clarifying LHA policy/procedure. Although this is not a certification program, it helps the supervisors manage their departments more effectively.

Objective #5:

M. Yawn through all supervisors

Continue to reward performance through the performance evaluation/merit increase system.

Timeliness of evaluations has improved in most departments. Some training is being planned for supervisors on standard operating procedure of Performance Evaluations to clarify steps and try to improve consistency in using this tool.

GOAL #2: CONTINUE TO IMPROVE OUR PUBLIC IMAGE THROUGH ENHANCED COMMUNICATION, COORDINATION, AND ACCOUNTABILITY WITH OUTSIDE AGENCIES, AMONG THE STAFF AND WITH RESIDENTS.

Objective #1:

H. Hernandez

Conduct regular staff meetings to provide updates and progress reports about agency activities.

Monthly staff meetings with full-time regular staff occur after each LHA Board meeting. Questions are answered and information shared regarding issues and opportunities.

Objective #2:

E. Haynes, and J. Driskell

Meet with residents in a variety of forums to provide the opportunity for input and feedback about agency operations.

Monthly residents meetings are scheduled and held at each of LHA's properties to update our residents on the operation and activities of LHA. The monthly meetings also provide the residents an opportunity for input and a time to express any concerns they might have. Staff meets with the LHA Resident Advisory Association periodically.

Objective #3:

H. Hernandez, E. Haynes, E. Gainers, C. Dolmseth

Utilize public relations and information techniques to educate the public about the work that we do: issue public service announcements and press releases; meet with news reporters periodically; seek advice from the City of Lakeland's public information officer; enhance our web site, annual report and newsletter; attend public meetings and neighborhood programs.

So far this year, three (3) meetings have been held with the Paul A. Diggs and other Webster Park Neighborhood Associations, four (4) with NAACP Executive Board, one (1) NAACP public forum, one (1) with Section 8 landlords, and two (2) with the Lakeland City Commission. Several presentations were made by LHA staff to Central Neighborhood and Crystal Lake Neighborhood Associations.

Objective #4:

H. Hernandez with support from all Directors

Generate at least six (6) positive media stories a year.

Bay News 9 did a spotlight on LHA's security camera system during the month of June 2004. The focus was on a drug arrest that was made possible as a result of the cameras. The monitoring station was televised in operation with our own Dewey Pollock in the drivers seat. One resident at Bonnet Shores was interviewed and had positive statements about the camera system. Two other stories on local television stations covered the lease-up activities at Washington Oaks. The Lakeland Ledger had positive stories so far this year

Objective #5:

H. Hernandez with support from all Directors

Deliver at least four (4) talks to civic, religious, or women's groups a year about the activities of LHA.

LHA staff appeared on two (2) local radio station talk shows, spoke four (4) times to neighborhood and civic groups. Mike Butler presented eviction training to the Lakeland Landlord Association. Mike was asked to speak to the LPD officers about how the police department can help LHA identify and report problems with Section 8 clients. The training was very well received and proved to be beneficial to LPD.

GOAL #3: BE THE PREMIER INNOVATIVE AND EFFECTIVE AFFORDABLE HOUSING PROVIDER IN MID-FLORIDA.

Objective #1:

J. Driskell, D. Wright

Utilize LHA's role as the HOPE VI developer to implement the remaining homeownership phases by October 4, 2006. Furthermore, use this opportunity to gain the expertise to continue homeownership efforts after the HOPE VI project is completed.

Sales at Magnolia Pointe are proceeding with ten closings anticipated by the end of the summer. Single-family homeownership units will begin construction in late 2004 through 2006.

Objective #2:

J. Driskell, C. Johnson, C. Wilken

Utilize LHA's role as the HOPE VI developer to implement the remaining rental phases by October 4, 2006. Furthermore, use this opportunity to gain the expertise to continue rental efforts after the HOPE VI project is completed.

LHA was chosen by the City of Lakeland to be the only developer allowed to submit a site plan for approval under the recent tax credit round scenario. The application scored a perfect 66 points, but due to a poor lottery number, will not be rewarded with tax credits. The application was submitted on March 3, 2004^t, and received a 139 out of 144 lottery number. In essence, this means that no tax credits will be awarded to this application for 2004, but this same parcel of land will be resubmitted in early 2005 for 9% tax credits. In addition, other parcels are being identified and qualified for future potential use. Florida Housing Finance Corporation (FHFC) announced that Polk County will be designated as a "LARGE" county for application purposes. All of the ramifications of this change are being investigated and will be expanded on at a later date.

Objective #3:

J. Driskell, E. Haynes, M. Yawn, C. Wilken, C. Johnson

Develop staff and organizational capability so that LHA is prepared to manage its non-public housing rental properties by December 31, 2008.

LHA has begun to develop a business plan to set up our own for profit management affiliated entity. We anticipate this process to be ongoing through the balance of 2004 and part of 2005.

Objective #4

M. Yawn, S. Glass, L. Willis

Apply for additional housing choice vouchers as they become available.

On June 8th, an application was submitted for 274 additional Housing Choice Vouchers. These replacement vouchers are available to PHAs that have demolished Public Housing and have or may need to use their existing Section 8 program to relocate these families. Staff of the Miami HUD office actually encouraged LHA to apply, so we are anticipating a favorable outcome from the application.

Objective #5:

H. Hernandez, J. Driskell, C. Wilken

Partner with the Lakeland Polk Housing Corporation and other housing providers to increase the availability of affordable housing in mid-Florida.

LHA, through its identity of interest affiliates, has partnered to develop Dakota Park. It has also filed an application for LIHTC credits to provide the equity to build 160 units of affordable housing, which will be known as Arbor Manor. Conversations have begun this week with Polk County officials on partnering or unilaterally becoming the primary provider of affordable housing in Polk County.

Objective #6:

E. Haynes, R. Gregory

Partner with the interested social service providers to encourage upward mobility and self-sufficiency of residents.

We have established a Memorandum of Understanding (MOU) with twenty-two social and health service providers, thus far, to assist residents towards upward mobility and self-sufficiency.

GOAL #4: IMPLEMENT INCOME GENERATING AND COST SAVING MEASURES WHILE INCREASING OPERATIONAL EFFICIENCY IN ORDER TO REDUCE LHA'S DEPENDENCY ON HUD FUNDING.

Objective #1:

J. Driskell, J. Ledford, B. Goodowens

Begin implementing Energy and Water Cost savings programs by December 31, 2004.

LHA is continuing to work on the ESCo program. We are currently waiting on HUD Miami to review our proposed program. Once approved, we will seek financing for the project and anticipate starting work before the end of the year.

Objective #2:

S. Glass, E. Haynes

By December 31, 2004, improve the accuracy of tenant rental payments to reduce both mistakes and fraud as part of a Tenant Integrity Program.

Section 8 staff audited all tenant files in preparation for the RIM review held June 28 through July 1, 2004. Each Resident Services Specialist (RSS) audits their caseload as they make any changes in the tenant's 2004 file. The Occupancy Manager audits 10% of all the RSS monthly caseload. The Public Housing staff continues to audit all tenant files in an effort to rectify third-party verifications noted during the RIM review held on June 28, 2004. The Resident Services Specialist (RSS) Property Managers will conduct a 100% audit of the Public Housing files and are expected to be completed by September 1, 2004. The Director of Resident Services will sign off on the validity of each file and thereafter, will conduct an audit 10% of all the property managers' files bi-monthly.

Objective #3:

J. Driskell, C. Wilken, H. Hernandez

In 2006, begin investigating LHA staffing assets that can be marketed to others in mid-Florida.

LHA staff is currently preparing a business plan to set up a property management affiliate to manage third party and LHA properties. We hope to have this in operation by the end of the third quarter of 2005.

Objective #4:

J. Driskell, C. Wilken, H. Hernandez

Begin developing LHA's first post-HOPE VI affordable rental or homeownership development by December 31, 2008.

Application has been made with HUD to extend our HOPE VI grant until October 6, 200; therefore, no plans are currently in process for this phase since underwriting criteria will undoubtedly change before that date. However, in the process of acquiring land for future HOPE VI phases, we are investigating the possibility of developing some of the land as market rate developments, which will help to write down the costs of the affordable housing.

Objective #5:

E. Haynes, H. Hernandez, S. Boyer, C. Wilken, C. Johnson

Develop and implement a grantsmanship/tax credit plan that will assist LHA in fulfilling its mission. Bring in \$100 million by December 31, 2008.

The Director of Special Projects was hired to oversee grant writing at LHA. He will be giving guidance to those working within the process, thereby increasing the knowledge base throughout the entire LHA organization. The total amount of grants/tax credits applied for this year are approximately \$8,757,000.

GOAL #5: IMPROVE THE PHYSICAL CONDITION AND APPEARANCE OF ALL PROPERTIES.

Objective #1:

J. Driskell, J. Ledford

Implement Capital Fund Program as indicated in the Five-Year Plan.

Our capital fund program is tied to the pending ESCo program (Goal 4 # 1) and will proceed according to the required HUD approvals later this year. The comprehensive modernization will include kitchen and bath modernization, new doors, windows, central HVAC, water supply line replacement, electrical service upgrade, new flooring, The proposed budgets are: (37) One bedrooms - \$ 29,889; (120) Two Bedrooms - \$33,992; (45) Three Bedrooms - \$45,888; (1) Four Bedroom \$48,157.

Objective #2:

J. Driskell, J. Ledford

Implement enhanced landscaping throughout all sites.

LHA is working with the City of Lakeland to continue to install free drought-tolerant plant material that the City has provided to us. We have been waiting on the rainy season to plant additional plants so that they can be properly established without constant watering.

GOAL #6: INCREASE AND ENCOURAGE THE SELF-SUFFICIENCY EFFORTS OF ALL RESIDENTS.

Objective # 1:

E. Gainers, R. Ford

Utilizing tutorial and computer aided programs, LHA will assist our resident's children to attain academic success as measured by increases in GPA, FCAT, SAT and ACT scores.

Residents will utilize the Plato Learning Software to increase their GPA and FCAT scores. Tutors will be available for after school homework help and tutoring. Plato Learning software will help prep students for the SAT and ACT test.

Objective #2:

E. Gainers, R. Gregory

Adult residents will be afforded the opportunity to increase their literacy skills and to continue their adult educational goals through the use of Technical Learning Centers and distance learning programs.

Residents without a HS diploma and/or GED certificate will be identified using the HOPE VI Database and Skills Assessment Survey. Residents, assisted by case manager, will develop an educational goal plan that will be used as a road map to be followed by the residents in order to complete goals established. Through the use of Technical Centers, residents will be able to do web-based research and use the PLATO software to meet academic requirements.

Objective #3:

E. Gainers, R. Gregory

Residents will have the capability to obtaining employability and life-skills training through the use of on-site Technical Learning Centers.

STEPS program will help residents in developing the like skills needed to make decisions based on the truth about who they are, where they are, who they want to be, and where they need to go to successfully accomplish their goal of securing employment. Residents will be able to use technical learning centers, its computers and related software, in resume preparation and Plato Employability skills. Pre Job Fair Seminar conducted at the Westlake Youth facility Technical centers to familiarize residents with the concept of web base job searching. Residents will be able to access Polk Works job search site, Board of County Commissioners office, City of Lakeland employment opportunities web page, the Ledger on-line classifieds, etc.

Attachment I

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14P01150102 Replacement Housing Factor Grant No:			Federal FY of Grant: 2002
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 06/30/2004 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	\$260,000		\$139,769	\$139,769
3	1408 Management Improvements	\$49,000		\$29,582	\$29,582
4	1410 Administration	\$140,000		\$140,000	\$140,000
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$74,500		\$67,874	\$67,874
8	1440 Site Acquisition				
9	1450 Site Improvement	\$153,215		\$153,373	\$153,373
10	1460 Dwelling Structures	\$551,325		\$551,889	\$551,889
11	1465.1 Dwelling Equipment— Nonexpendable	\$52,594		\$52,594	\$52,594
12	1470 Nondwelling Structures	\$15,000		\$13,331	\$13,331
13	1475 Nondwelling Equipment	\$2,000		\$1,835	\$1,835
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	0		0	0
18	1499 Development Activities	0		0	0
19	1501 Collaterization or Debt Service				
20	1502 Contingency	0		0	0
21	Amount of Annual Grant: (sum of lines 2 –	\$1,297,634		\$1,150,247	\$1,150,247

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

PHA Name: Lakeland Housing Authority	Grant Type and Number Capital Fund Program Grant No: FL14P01150102 Replacement Housing Factor Grant No:	Federal FY of Grant: 2002
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Original Annual Statement **Reserve for Disasters/ Emergencies** **Revised Annual Statement (revision no:)**
 Performance and Evaluation Report for Period Ending: 06/30/2004 **Final Performance and Evaluation Report**

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
	20)				
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.	(2) To be completed for the Performance and Evaluation Report
Signature of Executive Director and Date	Signature of Public Housing Director/Office of Native American Programs Administrator & Date

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14P01150102 Replacement Housing Factor Grant No:				Federal FY of Grant: 2002		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA-Wide	Operations							
	- Operating Subsidy	1406	20%	\$260,000		\$139,769	\$139,769	
	Total 1406			\$260,000		\$139,769	\$139,769	
PHA-Wide	Management Improvements							
	- Develop and Update Agency Plan	1408	Lump Sum	\$10,000		\$20,822	\$20,822	
	- Develop Resident Initiatives	1408	Lump Sum	\$4,000		\$4,000	\$4,000	
	- Computer Software	1408	Lump Sum	\$10,000		\$2,970	\$2,970	
	- Grant Writing	1408	Lump Sum	\$15,000		\$1,790	\$1,790	
	- Security Camera System	1408	Lump Sum	\$10,000				
	Total 1408			\$49,000		\$29,582	\$29,582	
PHA – Wide	Administration							
	- Facilities Director – 50%, Operations Support Assoc. – 100%, Purchasing Agent – 35%	1410	Lump Sum	\$61,880		\$61,880	\$61,880	
	- Employee Benefits	1410	Lump Sum	\$19,600		\$19,600	\$19,600	
	- Proration of Admin Support	1410	Lump Sum	\$58,520		\$58,520	\$58,520	

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14P01150102 Replacement Housing Factor Grant No:				Federal FY of Grant: 2002		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	Total 1410			\$140,000		\$140,000	\$140,000	
PHA-Wide	Fees and Costs							
	- Clerk-of-the-Works Salary	1430	Lump Sum	\$39,000		\$22,378	\$22,378	
	- Security Camera Maintenance Contract	1430	Lump Sum	\$12,500		\$17,680	\$17,680	
	- A/E Fees	1430	Lump Sum	\$18,500		\$23,315	\$23,315	
	- Sundry Planning and In-house Design	1430	Lump Sum	\$4,500		\$4,501	\$4,501	
	Total 1430			\$74,500		\$67,874	\$67,874	
PHA-Wide	Site Improvements							
	- Tree Trimming	1450	Lump Sum	\$1,000		\$1,000	\$1,000	
	- Sidewalk Repairs	1450	Lump Sum	\$15,000		\$15,000	\$15,000	
	- Erosion Control	1450	Lump Sum	\$6,000		\$6,000	\$6,000	
	- Fencing	1450	Lump Sum	\$5,000		\$5,000	\$5,000	
	- Reseal/Paving Repair	1450	Lump Sum	\$15,000		\$15,000	\$15,000	

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150102 Replacement Housing Factor Grant No:				Federal FY of Grant: 2002		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	- Drainage Repair/Gutters	1450	Lump Sum	\$10,000		\$10,000	\$10,000	
	- Landscaping	1450	Lump Sum	\$1,000		\$1,000	\$1,000	
	- Signage	1450	Lump Sum	\$1,000		\$1,000	\$1,000	
	- Add Parking Central	1450	Lump Sum	\$5,000		\$5,000	\$5,000	
FL11-4 Westlake Addition.	- Playground Equipment/ Basketball Court	1450	Lump Sum	\$5,000		\$5,000	\$5,000	
FL11-5 Lakeview Gardens	- Site Improvements Magnolia	1450	Lump Sum	\$5,000		\$5,158	\$146,274	
	- Common Area Irrigation/Wells	1450	Lump Sum	\$5,000		\$5,000	\$5,000	
FL11-6 Cecil Gober & John Wright	- Playground Improvements (Forced account labor)	1450	Lump Sum	\$5,000		\$5,000	\$5,000	
	- Water Line Replacement and Individual Meters (Forced account labor)	1450	Lump Sum	\$34,608		\$34,608	\$34,608	
FL11-7 Paul Colton & Bonnet Shores	- Water Line Replacement and Individual Meters (Forced account labor)	1450	Lump Sum	\$34,607		\$34,607	\$34,607	

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150102 Replacement Housing Factor Grant No:				Federal FY of Grant: 2002		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	- Playground Improvements (Forced account labor)	1450	Lump Sum	\$5,000		\$5,000	\$5,000	
	Total 1450			\$153,215		\$153,373	\$153,373	
PHA-Wide	Dwelling Structures							
	- Exterior Painting	1460	Lump Sum	\$10,000		\$10,000	\$10,000	
	- Pressure Washing	1460	Lump Sum	\$1,000		\$1,000	\$1,000	
	- Exterior/ Screen Doors	1460	Lump Sum	\$1,000		\$1,000	\$1,000	
	- Security Window Screens	1460	Lump Sum	\$1,000		\$1,000	\$1,000	
	- Exterior Masonry Repairs	1460	Lump Sum	\$1,000		\$1,000	\$1,000	
	- Soffet, Fascia, & Gable Repairs	1460	Lump Sum	\$1,000		\$1,000	\$1,000	
	- Energy Conservation	1460	Lump Sum	\$10,000		\$10,000	\$10,000	
FL11-2 Westlake	- Comprehensive Modernization to include – mildew control, central HVAC, dryer/vent/wiring, and range vent hoods	1460	Lump Sum	\$10,000		\$10,000	\$10,000	
FL11-5 Lakeview Garden	- Comprehensive Modernization to include interior and exterior renovations	1460	Lump Sum	\$64,825		\$65,389	\$65,389	

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150102 Replacement Housing Factor Grant No:				Federal FY of Grant: 2002		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-6 Cecil Gober & John Wright	- Comprehensive Modernization to include utility doors, exterior windows, kitchen and bath modernization, water supply line replacement, emergency call system, dryer vents, central HVAC, interior doors and attic insulation (Forced account labor)	1460	Lump Sum	\$163,500		\$163,500	\$163,500	
FL11-7 Paul Colton & Bonnet Shores	- Comprehensive Modernization to include utility doors, exterior windows, kitchen and bath modernization, water supply line replacement, emergency call system, dryer vents, central HVAC, attic insulation, gutters and downspouts, and interior doors (Forced account labor)	1460	Lump Sum	\$288,000		\$288,000	\$288,000	
	Total 1460			\$551,325		\$551,889	\$551,889	
1465.1	Dwelling Equipment							

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150102 Replacement Housing Factor Grant No:				Federal FY of Grant: 2002		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA-Wide	- Appliance Replacement	1465.1	Lump Sum	\$52,594		\$52,594	\$52,594	
	Total 1465.1			\$52,594		\$52,594	\$52,594	
1470	Non-Dwelling Structures							
PHA-Wide	- Renovation of Community Buildings	1470	Lump Sum	\$15,000		\$13,331	\$13,331	
	Total 1470			\$15,000		\$13,331	\$13,331	
1475	Non-Dwelling Equipment							
PHA-Wide	- Replace Office furniture and equipment	1475	Lump Sum	\$2,000		\$1,835	\$1,835	
	- Common Area furniture and fixtures	1475	Lump Sum	0				
	Purchase site-based maintenance vehicles	1475	2	0				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150102 Replacement Housing Factor Grant No:				Federal FY of Grant: 2002		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	Replacement Equipment including handtruck, floor buffers, wet vacs, spray paint equip., chain saws, backpack sprayers, hvac recovery equip., and drywall spray texture machine)	1475	Lump Sum	0				
	Replacement diesel "Dixie Chopper" mower	1475	Lump Sum	0				
	Replacement double axle trailer	1475	Lump Sum	0				
	Total 1475			\$2,000		\$1,835	\$1,835	
1495.1	Relocation Costs							
	- Relocation	1495.1	Lump Sum	0				
	Total 1495.1			0				
1498	Mod Used for Development							
	- Development	1498	Lump Sum	0				
	Total 1498			0				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program No: FL29P01150102 Replacement Housing Factor No:					Federal FY of Grant: 2002	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates	
	Original	Revised	Actual	Original	Revised	Actual		
1406	12/03			6/05				
1408	12/03			6/05				
1410	12/03			6/05				
1430	12/03			6/05				
1450	12/03			6/05				
1460	12/03			6/05				
1465.1	12/03			6/05				
1470	12/03			6/05				
1475	12/03			6/05				
1495.1	12/03			6/05				
1499	12/03			6/05				
1502	12/03			6/05				

Annual Statement/Performance and Evaluation Report						
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary						
PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: <input checked="" type="checkbox"/> FL14P011502-03 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 6/30/2004 <input type="checkbox"/> Final Performance and Evaluation Report						
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost		
		Original	Revised	Obligated	Expended	
1	Total non-CFP Funds					
2	1406 Operations					
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	1499 Development Activities	\$213,298		0	0	
19	1501 Collateralization or Debt Service					
20	1502 Contingency					
21	Amount of Annual Grant: (sum of lines 2 – 20)	\$213,298		0	0	
22	Amount of line 21 Related to LBP Activities					
23	Amount of line 21 Related to Section 504 compliance					

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: <input checked="" type="checkbox"/> FL14P011502-03 Replacement Housing Factor Grant No:		Federal FY of Grant: 2003	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 6/30/2004 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14P011502-03 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
1499	Mod Used for Development							
PHA Wide	Development	1499	Lump Sum	\$213,298		0	0	
	Total 1499			\$213,298		0	0	

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program No: <input checked="" type="checkbox"/> FL14P01150203 Replacement Housing Factor No:			Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PHA Wide	12/05			12/07			

Attachment K

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 1) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 06-30-2004 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	\$239,000	\$144,087		
3	1408 Management Improvements	\$11,000	\$11,000	\$2,394	\$2,394
4	1410 Administration	\$120,000	\$120,000	\$92,493	\$92,493
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$40,000	\$40,000	\$3,569	\$3,569
8	1440 Site Acquisition				
9	1450 Site Improvement	\$128,000	\$128,000	\$15,151	\$15,151
10	1460 Dwelling Structures	\$510,000	\$510,000	\$187,889	\$187,889
11	1465.1 Dwelling Equipment— Nonexpendable	\$1,000	\$1,000	\$1,000	\$1,000
12	1470 Nondwelling Structures	\$1,000	\$1,000	\$800	\$800
13	1475 Nondwelling Equipment	\$48,800	\$48,800	\$8,966	\$8,966
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	\$1,000	\$1,000		
18	1499 Development Activities	\$5,000	\$5,000		
19	1501 Collaterization or Debt Service				

Annual Statement/Performance and Evaluation Report

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

PHA Name: Lakeland Housing Authority	Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:	Federal FY of Grant: 2003
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no: 1)
 Performance and Evaluation Report for Period Ending: 06-30-2004
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
20	1502 Contingency	\$95,200	0		
21	Amount of Annual Grant: (sum of lines 2 – 20)	\$1,200,000	\$1,009,887	\$312,262	\$312,262
22	Amount of line 21 Related to LBP Activities	0	0		
23	Amount of line 21 Related to Section 504 compliance	0	0		
24	Amount of line 21 Related to Security – Soft Costs	0	0		
25	Amount of Line 21 Related to Security – Hard Costs	0	0		
26	Amount of line 21 Related to Energy Conservation Measures	\$205,000	\$205,000		

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA-Wide	Operations							
	- Operating Subsidy	1406	>20%	\$144,087				
	Total 1406			\$144,087				
PHA-Wide	Management Improvements							
	- Develop & Update Agency Plan	1408	Lump Sum	\$6,000		\$2,394	\$2,394	
	- Vacancy Reduction	1408	Lump Sum	\$1,000				
	- Develop Resident Initiatives	1408	Lump Sum	\$1,000				
	- Computer Software	1408	Lump Sum	\$1,000				
	- Grant Writing	1408	Lump Sum	\$1,000				
	- Security Camera System	1408	Lump Sum	\$1,000				
	Total 1408			\$11,000		\$2,394	\$2,394	
PHA – Wide	Administration							

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	- Facilities Director – 25%, Maintenance Sup 50% Operations Support Assoc. – 50%, Purchasing Agent – 35%	1410	Lump Sum	\$58,000		\$44,396	\$44,396	
	- Employee Benefits	1410	Lump Sum	\$22,000		\$16,649	\$16,649	
	- Proration of Admin Support	1410	Lump Sum	\$40,000		\$31,448	\$31,448	
	Total 1410			\$120,000		\$92,493	\$92,493	
PHA-Wide	Fees and Costs							
	- Clerk-of-the-Works Salary 50% (15 hours per week)	1430	Lump Sum	\$15,500				
	- Security Camera Maintenance Contract	1430	Lump Sum	\$1,000				
	- A/E Fees	1430	Lump Sum	\$19,000		\$2,069	\$2,069	
	- Sundry Planning and In-house Design	1430	Lump Sum	\$4,500		\$1,500	\$1,500	
	Total 1430			\$40,000		\$3,569	\$3,569	
PHA-Wide	Site Improvements							

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	- Tree Trimming	1450	Lump Sum	\$10,000				
	- Sidewalk Repairs	1450	Lump Sum	\$10,000				
	- Erosion Control	1450	Lump Sum	\$6,000				
	- Fencing	1450	Lump Sum	\$5,000				
	- Reseal/Paving Repair	1450	Lump Sum	\$15,000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	

Annual Statement/Performance and Evaluation Report

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

Part II: Supporting Pages

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	- Drainage Repair/Gutters	1450	Lump Sum	\$4,000				
	- Landscaping	1450	Lump Sum	\$15,000		\$3,120	\$3,120	
	- Signage	1450	Lump Sum	\$1,000				
	- Add Parking Central	1450	Lump Sum	\$15,000				
	- Misc Repairs –PHAS	1450	Lump Sum	\$2,000				
FL11-4 Westlake Addition.	- Playground Equipment/ Basketball Court	1450	Lump Sum	\$1,000		\$444	\$444	
FL11-5 Lakeview Gardens	Site improvements	1450	Lump Sum	\$1,000				
		1450	Lump Sum					
FL11-6 Cecil Gober & John Wright	- Playground Improvements (Forced account labor)	1450	Lump Sum	\$1,000				
	- Water Line Replacement and Individual Meters (Forced account labor)	1450	Lump Sum	\$1,000				

Annual Statement/Performance and Evaluation Report

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

Part II: Supporting Pages

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-7 Paul Colton & Bonnet Shores	- Water Line Replacement and Individual Meters (Force account labor)	1450	Lump Sum	\$40,000		\$11,587	\$11,587	
	- Playground Improvements (Force account labor)	1450	Lump Sum	\$1,000				
	Total 1450			\$128,000		\$15,151	\$15,151	
PHA-Wide	Dwelling Structures							
	- Exterior Painting	1460	Lump Sum	\$3,000		\$1,274	\$1,274	
	- Pressure Washing	1460	Lump Sum	\$1,000				
	- Exterior/ Screen Doors	1460	Lump Sum	\$1,000				
	- Security Window Screens	1460	Lump Sum	\$1,000				
	- Exterior Masonry Repairs	1460	Lump Sum	\$1,000				
	- Soffet, Fascia, & Gable Repairs	1460	Lump Sum	\$1,000				
	- Fire Suppression System	1460	Lump Sum	\$20,000				
	- Misc Repairs PHAS	1460	Lump Sum	\$2,000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-2 Westlake	- Comprehensive Modernization to include –Exterior Paint, mildew control, central HVAC, dryer/vent/wiring, and range vent hoods	1460	Lump Sum	\$85,000		\$8,669	\$8,669	
FL11-4 Westlake Add	Exterior Paint	1460	Lump Sum	\$1,000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-6 Cecil Gober & John Wright	- Comprehensive Modernization to include utility doors, exterior windows, kitchen and bath modernization, VCT flooring replacement, water supply line replacement, emergency call system, dryer vents, central HVAC, interior & exterior doors and attic insulation, repair termite damage, drywall replacement, HW heater replacement, upgrade elec service (replace aluminum wire and devices) (Forced account labor)	1460	Lump Sum	\$1,000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-7 Paul Colton & Bonnet Shores	- Comprehensive Modernization to include utility doors, exterior windows, kitchen and bath modernization,VCT flooring replacement, water supply line replacement, emergency call system, dryer vents, central HVAC, attic insulation, gutters and downspouts, and interior & exterior doors, repair termite damage,drywall replacement,HW heater replacement,upgrade elec service (replace aluminum wire and devices) (Forced account labor)	1460	Lump Sum	\$393,000		\$177,945	\$177,945	
	Total 1460			\$510,000		\$187,889	\$187,889	
1465.1	Dwelling Equipment							
PHA-Wide	- Appliance Replacement	1465.1	Lump Sum	\$1,000		\$1,000	\$1,000	

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	Total 1465.1			\$1,000		\$1,000	\$1,000	
1470	Non-Dwelling Structures							
PHA-Wide	- Renovation of Community Buildings	1470	Lump Sum	\$1,000		\$800	\$800	
	Total 1470			\$1,000		\$800	\$800	
1475	Non-Dwelling Equipment							
PHA-Wide	- Replace Office furniture and equipment	1475	Lump Sum	\$5,000		\$895	\$895	
	- Common Area furniture and fixtures	1475	Lump Sum	\$1,000				
	Purchase maintenance vehicles	1475	2	\$30,000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	Replacement Equipment including handtruck, floor buffers, wet vacs, spray paint equip., chain saws, backpack sprayers, hvac recovery equip., and drywall spray texture machine)	1475	Lump Sum	\$4,000		\$3,271	\$3,271	
	Replacement mower	1475	Lump Sum	\$4,800		\$4,800	\$4,800	
	Replacement dump trailer	1475	Lump Sum	\$4,000				
	Total 1475			\$48,800		\$8,966	\$8,966	
1495.1	Relocation Costs							
	- Relocation	1495.1	Lump Sum	\$1,000				
	Total 1495.1			\$1,000				
1498	Mod Used for Development							
	- Development	1498	Lump Sum	\$5,000				
	Total 1498			\$5,000				

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

PHA Name: Lakeland Housing Authority	Grant Type and Number Capital Fund Program No: FL29P01150103 Replacement Housing Factor No:	Federal FY of Grant: 2003
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Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
1406	12/04			6/06			
1408	12/04			6/06			
1410	12/04			6/06			
1430	12/04			6/06			
1450	12/04			6/06			
1460	12/04			6/06			
1465.1	12/04			6/06			
1470	12/04			6/06			
1475	12/04			6/06			
1495.1	12/04			6/06			
1499	12/04			6/06			
1502	12/04			6/06			

Attachment L
2004 CFP and HRF Allocations

As of June 30, 2004 the Lakeland Housing Authority had not received its 2004 allocations and therefore no P&E Report is possible.

Attachment M

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: LAKELAND HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: FL14R011502-05			Federal FY of Grant: 2005
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
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	1499 Development Activities	580,540			

Annual Statement/Performance and Evaluation Report

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

PHA Name: LAKELAND HOUSING AUTHORITY	Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: FL14R011502-05	Federal FY of Grant: 2005
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending:
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
19	1501 Collaterization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)				
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: LAKELAND HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: FL29P011XXX				Federal FY of Grant: 2005		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
1499 PHA-WIDE	DEVELOP ADDITIONAL AFFORDABLE HOUSING IN OUR SERVICE AREA	1499	LUMP SUM	580,540				

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

PHA Name:LAKELAND HOUSING AUTHORITY		Grant Type and Number Capital Fund Program No: Replacement Housing Factor No: FL29P011XXX					Federal FY of Grant: 2005
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
1499	12/07			12/09			

Attachment N Pet Policy

The Lakeland Housing Authority allows for pet ownership in its developments with the written pre-approval of the Housing Authority.

The Lakeland Housing Authority adopts the following reasonable requirements as part of the Pet Policy:

1. Residents are responsible for any damage caused by their pets, including the cost of fumigating or cleaning their units.
2. In exchange for this right, resident assumes full responsibility and liability for the pet and agrees to hold the Lakeland Housing Authority harmless from any claims caused by an action or inaction of the pet.
3. Residents must have the prior written approval of the Housing Authority before moving a pet into their unit.
4. Residents must request approval on the Authorization for Pet Ownership Form that must be fully completed before the Housing Authority will approve the request.
5. Residents must give the Housing Authority a picture of the pet so it can be identified if it is running loose.
6. A pet deposit of \$300 is required at the time of registering a pet.
7. The Lakeland Housing Authority will allow only common household pets. This means only domesticated animals such as a dog, cat, bird, rodent (including a rabbit), fish in aquariums or a turtle will be allowed in units. Common household pets do not include reptiles (except turtles).

All dogs and cats must be spayed or neutered before they become six months old. A licensed veterinarian must verify this fact.

Only one four-legged pet per unit and other non- four-legged pets will be allowed according to this schedule.

Unit Size	Pets
Zero Bedroom	1
One Bedroom	1
Two Bedrooms	1
Three Bedrooms	2
Four or More Bedrooms	2

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

No animal may exceed twenty (20) pounds in weight projected to full adult size.

8. In order to be registered, pets must be appropriately inoculated against rabies, distemper and other conditions prescribed by state and/or local ordinances. They must comply with all other state and local public health, animal control, and anti-cruelty laws including any licensing requirements. A certification signed by a licensed veterinarian or state or local official shall be annually filed with the Lakeland Housing Authority to attest to the inoculations.
9. The Lakeland Housing Authority, or an appropriate community authority, shall require the removal of any pet from a project if the pet's conduct or condition is determined to be a nuisance or threat to the health or safety of other occupants of the project or of other persons in the community where the project is located.

Attachment O
Conversion Analysis

- a. How many of the PHA’s developments are subject to the Required Initial Assessments? **4**
- b. How many of the PHA’s developments are not subject to the Required Initial Assessments based on exemptions (e.g., elderly and/or disabled developments not general occupancy projects)? **1**
- c. How many Assessments were conducted for the PHA’s covered developments? **4**
- d. Identify PHA developments that may be appropriate for conversion based on the Required Initial Assessments:

Development Name	Number of Units
None	

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

Attachment P
Section 8 Homeownership Capacity Statement

The Lakeland Housing Authority's Section 8 Homeownership Program has the required capacity because a purchasing family must invest at least three percent of the purchase price of the home they are buying in the property. This can take the form of either a down payment, closing costs, or a combination of the two. Of this sum, at least one percent of the purchase price must come from the family's personal resources.

In addition, the family must qualify for the mortgage loan under a lender's normal lending criteria taking into account the fact that this is by definition a low-income family.