

PHA Plans

Streamlined 5-Year/Annual Version

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

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This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937 that introduced 5-year and annual PHA Plans. The full PHA plan provides a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission and strategies for serving the needs of low-income and very low-income families. This form allows eligible PHAs to make a streamlined annual Plan submission to HUD consistent with HUD's efforts to provide regulatory relief to certain PHAs. Public reporting burden for this information collection is estimated to average 11.7 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

Privacy Act Notice. The United States Department of Housing and Urban Development, Federal Housing Administration, is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Information in PHA plans is publicly available.

Streamlined 5-Year Plan for Fiscal Years 2006 - 2010

Streamlined Annual Plan for Fiscal Year 2006

NOTE: This PHA Plan template (HUD-50075-SA) is to be completed in accordance with instructions contained in previous Notices PIH 99-33 (HA), 99-51 (HA), 2000-22 (HA), 2000-36 (HA), 2000-43 (HA), 2001-4 (HA), 2001-26 (HA), 2003-7 (HA), and any related notices HUD may subsequently issue. Full reporting for each component listed in the streamlined Annual Plan submitted with the 5-year plan is required.

Streamlined Five-Year PHA Plan Agency Identification

PHA Name: Helena Housing Authority

PHA Number:

PHA Fiscal Year Beginning: (mm/yyyy) 07/2005

PHA Programs Administered:

Public Housing and Section 8
 Section 8 Only
 Public Housing Only
 Number of public housing units: 366 Number of S8 units: Number of public housing units:
 Number of S8 units: 345

PHA Consortia: (check box if submitting a joint PHA Plan and complete table)

Participating PHAs	PHA Code	Program(s) Included in the Consortium	Programs Not in the Consortium	# of Units Each Program
Participating PHA 1:				
Participating PHA 2:				
Participating PHA 3:				

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 and attachments (if any) 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

Streamlined Five-Year PHA Plan

PHA FISCAL YEARS 2006 - 2010

[24 CFR Part 903.12]

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: To provide all people with decent, safe, adequate and affordable housing and the opportunity to become self sufficient.

B. Goals

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

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

- PHA Goal: Expand the supply of assisted housing
- Objectives:
- Apply for additional rental vouchers:
 - Reduce public housing vacancies:
 - Leverage private or other public funds to create additional housing opportunities:
 - Acquire or build units or developments
 - Other (list below)
- Promote and continue relationships with local government and local non-profits to foster and promote local affordable housing issues. Continued participation with the Helena Area Housing Task Force and Home Choice Coalition community concerns, local housing issues, and support efforts by the Task Force to promote affordable housing in Helena and the Helena area.

- PHA Goal: Improve the quality of assisted housing
- Objectives:
- Improve public housing management: (PHAS score) strive to raise PHAS Score to 94% and maintain it at 94%.
 - Improve voucher management: (SEMAP score) Strive for and maintain 100% SEMAP score.
 - Increase customer satisfaction:
 - Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections) Research and supply training and professional development for all staff at all levels to promote efficiency in all PHA functions. Provide at least one major training to each staff member per year.
 - Renovate or modernize public housing units: Utilize Capital Fund Allocations to modernize public housing units to modernize public Housing units to a level where they are competitive on the open market. Dependent on funding, implement 5 year Plan.
 - Demolish or dispose of obsolete public housing: Investigate the possibility of demolition and development of HHA properties.
 - Provide replacement public housing:
 - Provide replacement vouchers: As offered by HUD, accept all preservation replacement vouchers.
 - Other: (list below)
Promote and foster the HHA Resident Services Program through the ROSS Grant initiatives. Make accessible classes and training for residents in the HHA and ME Anderson computer lab through initiatives identified in the ROSS Grant.
- PHA Goal: Increase assisted housing choices
- Objectives:
- Provide voucher mobility counseling: Section 8 staff will conduct Orientation meetings to inform applicants and resident of options and availability of voucher programs. At least two per year or as the waiting list requires.
 - Conduct outreach efforts to potential voucher landlords: As market Conditions and waiting list needs dictate, Section 8 staff will at least twice per year do outreach mailings to prospective landlords. Informational brochures will be made available to social service agency locations.
 - Increase voucher payment standards
 - Implement voucher homeownership program:
 - Implement public housing or other homeownership programs: Foster and Participate in the Helena Area Housing Task Force. Provide support for the initiation of a local low income home ownership program by local non-profit agencies.
 - 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: Public Housing, Section 8, Road Runner, and Wilder Apartments
 - Implement public housing security improvements:
 - Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
 - Other: (list below)
Maintain a community funding mechanism such as a revolving loan fund to assist residents having problems paying security and utility deposits.
Maintain community relations with other non-profit organizations to assist Residents having problems paying rent.

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: Promote resident participation in the Housing Authority, Family Self-Sufficiency and Family Investment Center Programs. Currently the HHA turnover rate is near 50% due to local conditions and success of current self-sufficiency programs offered by the HHA. The HHA will attempt to make the Family Investment Center program a self-perpetuating program by utilizing rental income from the building to fund a contract with Career Training Institute to provide training and supportive services to HHA residents. Where allowed, continue to provide equal access to supportive services and training funded at Family Investment Center through ROSS Grants.
 - Provide or attract supportive services to improve assistance recipients' employability: Promote resident participation in the Housing Authority Family Self-Sufficiency and Family Investment Center Program. Currently the HHA turnover rate is near 50% due to local conditions and successes of the current self-sufficiency programs offered by the HHA. The HHA will attempt to make the Family Investment Center program a self-perpetuating program by utilizing rental income from the building to fund a contract with Career Training Institute to provide training and supportive services to PHA residents. Depending on funding, if allowed, increase the present successful self sufficiency programs by five families per year. Where allowed, continue to provide equal access to

supportive services and training funded at Family Investment Center through ROSS funds.

- Provide or attract supportive services to increase independence for the elderly or families with disabilities. When allowed, continue to provide equal access to supportive services and training funded at the Family Investment Center through ROSS funds. Expand services offered, through a Social Services coordinator funded through the Management Improvement Line item of the Capital fund, concentrating on an Authority needs assessment and supportive services for the elderly and disabled.
- 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, sex, familial status, and disability:
 - Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:
 - Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
 - Other: (list below)

Other PHA Goals and Objectives: (list below)

Streamlined Annual PHA Plan

PHA Fiscal Year 2006

[24 CFR Part 903.12(b)]

Table of Contents

Provide the following table of contents for the streamlined Annual Plan submitted with the Five-Year Plan, including all streamlined plan components, and additional requirements, together with the list of supporting documents available for public inspection.

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Attachments

- X FY 2005 Capital Fund Program Annual Statement (mt004a06 Annual Statement CFP 2005.doc)
- X Capital Fund Program 5-Year Action Plan (mt004b05 Five Year CFP Plan.doc)
- X Resident Management Board (mt004c06 mbrship Resident management.doc)
- X Admissions Policy for Deconcentration (mt004d06 Policy on deconcentration)
- X Resident Comment and Sign-Up Sheets (mt004e06 ME Anderson Meeting Minutes.doc, mt004f06 ME Anderson Sign-Up Sheet.pdf, mt004g06 Resident Meeting.doc, and mt004h06 RMC Sign-Up Sheet.pdf)

B. SEPARATE HARD COPY SUBMISSIONS TO LOCAL HUD FIELD OFFICE

Form HUD-50077, PHA Certifications of Compliance with the PHA Plans and Related Regulations: Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans; Certification by State or Local Official of PHA Plan Consistency with Consolidated Plan.

For PHAs APPLYING FOR CAPITAL FUND PROGRAM (CFP) GRANTS:

Form HUD-50070, Certification for a Drug-Free Workplace;

Form HUD-50071, Certification of Payments to Influence Federal Transactions;

Form SF-LLL & SF-LLL, Disclosure of Lobbying Activities.

Executive Summary (optional)

[903.7(r)]. If desired, provide a brief overview of the contents of the streamlined 5-Year/Annual Plan.

1. Statement of Housing Needs [24 CFR Part 903.12 (b), 903.7(a)]

A. 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 PHA’s Waiting Lists			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input checked="" 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/sub jurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	839		213
Extremely low income <=30% AMI	360	82%	
Very low income (>30% but <=50% AMI)	74	17%	
Low income (>50% but <80% AMI)	4	.009%	
Families with children	218	50%	
Elderly families	41	10%	
Families with Disabilities	156	37%	
Race/ethnicity AI/AN	37	9%	
Race/ethnicity Asian	4	.009%	
Race/ethnicity-Black	4	.009%	
Race/ethnicity-White	385	90%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	61		
2 BR	27		
3 BR	31		
4 BR	7		
5 BR	0		
5+ BR	0		
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?			
<input type="checkbox"/> No <input type="checkbox"/> Yes			

B. Strategy for Addressing Needs

Provide a brief description of the PHA's strategy for addressing the housing needs of families on the PHA's public housing and Section 8 waiting lists **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

Select all that apply

- Employ effective maintenance and management policies to minimize the number of public housing units off-line
- Reduce turnover time for vacated public housing units
- Reduce time to renovate public housing units
- Seek replacement of public housing units lost to the inventory through mixed finance development
- Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources
- Maintain or increase section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction
- Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- Maintain or increase section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- Maintain or increase section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program
- Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- Other (list below)

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select all that apply

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

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

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

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

- Seek designation of public housing for families with disabilities
- Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing
- Apply for special-purpose 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)
Continue the process of developing a LIHTC project that will provide Universal Design concepts to increase housing stock to the disabled community.

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)
From the results of experience amongst the Housing Authority staff, the PHA selected strategies

2. Statement of Financial Resources

[24 CFR Part 903.12 (b), 903.7 (c)]

List on the following table 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 2006 grants)		
a) Public Housing Operating Fund	\$ 901,454.00	
b) Public Housing Capital Fund	\$ 629,412.00	
c) HOPE VI Revitalization	0	
d) HOPE VI Demolition	0	
e) Annual Contributions for Section 8 Tenant-Based Assistance	\$1,600,632.00	
f) Resident Opportunity and Self-Sufficiency Grants	\$ 300,000.00	
g) Community Development Block Grant	0	
h) HOME	0	
Other Federal Grants (list below)		
SHELTER PLUS CARE	\$140,000.00	HAP PAYMENTS
2. Prior Year Federal Grants (unobligated funds only) (list below)		
Capital Fund 2004	\$421,600.00	
3. Public Housing Dwelling Rental Income	\$546,892.00	
4. Other income (list below)		
4. Non-federal sources (list below)		
Total resources	\$4,539,990.00	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.12 (b), 903.7 (b)]

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: 90 Days
- Other: (describe) during the personal interview

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

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

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

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

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

(2) Waiting List Organization

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

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

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

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

c. Site-Based Waiting Lists-Previous Year

1. Has the PHA operated one or more site-based waiting lists in the previous year? If yes, complete the following table; if not skip to d.

Site-Based Waiting Lists				
Development Information: (Name, number, location)	Date Initiated	Initial mix of Racial, Ethnic or Disability Demographics	Current mix of Racial, Ethnic or Disability Demographics since Initiation of SBWL	Percent change between initial and current mix of Racial, Ethnic, or Disability demographics

2. What is the number of site based waiting list developments to which families may apply at one time?

3. How many unit offers may an applicant turn down before being removed from the site-based waiting list?

4. Yes No: Is the PHA the subject of any pending fair housing complaint by HUD or any court order or settlement agreement? If yes, describe the order, agreement or complaint and describe how use of a site-based waiting list will not violate or be inconsistent with the order, agreement or complaint below:

d. Site-Based Waiting Lists – Coming Year

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

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

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

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

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

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

(3) Assignment

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

- One
- Two
- Three or More

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

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

(4) Admissions Preferences

a. Income targeting:

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

b. Transfer policies:

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

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

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

- Working families and those unable to work because of age or disability

- Veterans and veterans' families
- Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)

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

1 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

- 2 Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)

4. Relationship of preferences to income targeting requirements:

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

(5) Occupancy

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

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

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

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

(6) Deconcentration and Income Mixing

a. Yes No: 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 on the following table:

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)]
MT0004005	44		See attached mt004e06 Policy on deconcentration

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):
- Other (list below)

- b. Yes No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- c. Yes No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- d. Yes No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)
- e. Indicate what kinds of information you share with prospective landlords? (select all that apply)
- Criminal or drug-related activity
- Other (describe below) Prior rental history, name and address of current and prior landlords

(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:

- If a tenant is unable to find suitable housing and provides a log of searches
- Reasonable accommodation for people with disabilities
- Hard to house families with three or more children

(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)
Shelter Plus Program to Voucher Program
Elderly and Disabled

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.

1 Date and Time

Former Federal preferences:

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- 2 Victims of domestic violence
- 2 Substandard housing
- Homelessness
- 2 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
- Victims of reprisals or hate crimes

2 Other preference(s) (list below)
Shelter Plus Program to Voucher Program
Elderly and Disabled

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

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

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

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

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

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

(5) Special Purpose 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) Through our Shelter Plus Care sponsor Golden Triangle Mental Health Center

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

- Through published notices
- Other (list below) HHA partners with the Montana Continuum of Care Network

4. PHA Rent Determination Policies

[24 CFR Part 903.12(b), 903.7(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 of the following two)

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

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

A Tenant fills out a Request for Hardship Exemption from Minimum Rent form. The tenant must request a suspension of rent in writing explaining why he or she feels they qualify for an exemption. An explanation is required even if the condition, situation, or circumstance is temporary. If the condition is temporary, the exemption will be for a period of 90 days from the date of the request. At the end of the 90-day suspension period, a minimum rent is imposed retroactively to the time of suspension. The family will be offered a responsible agreement for the amount of back owed rent.

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

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

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

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

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

e. Ceiling rents

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

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

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

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

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

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

f. Rent re-determinations:

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

- Never
- At family option
- Any time the family experiences an income increase
- Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold)\$200/month
- Other (list below)
Anytime there is a decrease in the family composition, a decrease in household income, or one's status of zero income, minimum rent changes.

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

a. 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) Fair Market Rents
Local Realtors

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)
Rent Survey

(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)

- If there is a decrease in income due to loss of employment resulting from being laid off or terminated where the individual is not at fault.
- In the event of a death in the family, which includes any, related family member residing in the household.

5. Capital Improvement Needs

[24 CFR Part 903.12(b), 903.7 (g)]

Exemptions from Component 5: Section 8 only PHAs are not required to complete this component and may skip to Component 6.

A. Capital Fund Activities

Exemptions from sub-component 5A: PHAs that will not participate in the Capital Fund Program may skip to component 5B. All other PHAs must complete 5A as instructed.

(1) Capital Fund Program

- a. Yes No Does the PHA plan to participate in the Capital Fund Program in the upcoming year? If yes, complete items 12 and 13 of this template (Capital Fund Program tables). If no, skip to B.
- b. Yes No: Does the PHA propose to use any portion of its CFP funds to repay debt incurred to finance capital improvements? If so, the PHA must identify in its annual and 5-year capital plans the development(s) where such improvements will be made and show both how the proceeds of the financing will be used and the amount of the annual payments required to service the debt. (Note that separate HUD approval is required for such financing activities.)

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

Applicability of sub-component 5B: 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.

(1) Hope VI Revitalization

- a. Yes No: Has the PHA received a HOPE VI revitalization grant? (if no, skip to next component; if yes, provide responses to questions on chart below 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)
Development name:
Development (project) number:
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

- c. Yes No: Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year? If yes, list development name/s below:
- d. Yes No: 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:
- e. Yes No: 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: Investigate the possibility of demotion or development of certain HHA developments.

6. Demolition and Disposition

[24 CFR Part 903.12(b), 903.7 (h)]

Applicability of component 6: Section 8 only PHAs are not required to complete this section.

- a. Yes No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 or 24 (Hope VI) of the U.S. Housing Act of 1937 (42 U.S.C. 1437p) or Section 202/Section 33 (Mandatory Conversion) in the plan Fiscal Year? (If “No”, skip to component 7; if “yes”, complete one activity description for each development on the following chart.)

Demolition/Disposition Activity Description
1a. Development name: 4-3 Project
1b. Development (project) number: MT004003 S 10
2. Activity type: Demolition <input checked="" type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date application approved, submitted, or planned for submission: <u>(DD/MM/YY) 2006</u>
5. Number of units affected: 13
6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development *Planning and Feasibility Stage only.
7. Timeline for activity: a. Actual or projected start date of activity: b. Projected end date of activity:

Demolition/Disposition Activity Description
1a. Development name: 4-1 Project
1b. Development (project) number: MT004001 S 01
2. Activity type: Demolition <input checked="" type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date application approved, submitted, or planned for submission: <u>(DD/MM/YY) 2006</u>
5. Number of units affected: 72
6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development * Planning and Feasibility Stage only.
7. Timeline for activity: a. Actual or projected start date of activity: b. Projected end date of activity:

Demolition/Disposition Activity Description

1a. Development name: 4-2 Project
1b. Development (project) number: MT004002 S 01
2. Activity type: Demolition <input checked="" type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date application approved, submitted, or planned for submission: <u>(DD/MM/YY) 2006</u>
5. Number of units affected: 60
6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development * Planning and Feasibility Stage only.
7. Timeline for activity: a. Actual or projected start date of activity: b. Projected end date of activity:

7. Section 8 Tenant Based Assistance--Section 8(y) Homeownership Program

[24 CFR Part 903.12(b), 903.7(k)(1)(i)]

(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 the next component; if “yes”, complete each program description below (copy and complete questions for each program identified.)

(2) **Program Description** This option will provide eligible families the opportunity of purchasing and owning a home using HCV assistance.

A family assisted under this program must be a qualified existing HCV participant who has been receiving HHA HCV assistance for a minimum of one year.

HHA will not limit the number of vouchers to be used for Homeownership during any fiscal year.

A live-in aide, if needed as a reasonable accommodation for persons with disabilities, must be approved by HHA pursuant to 24CFR 982.316.

HHA will require a minimum homeowner down payment of at least 3% of the purchase price and closing costs of the home. A minimum of 1% of the purchase price must come from the family’s own resources. This down payment requirement may include the cost of appraisals and earnest money, but may not include the cost of the independent home inspection required elsewhere in this policy.

Financing of a home purchase under this option must comply with secondary mortgage market underwriting requirements; or, comply with generally accepted private underwriting standards

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, what is the maximum number of participants this fiscal year?

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:

c. What actions will the PHA undertake to implement the program this year (list)? The HHA will make Section 8 Homeownership information readily available to Section 8 Clients who have remained in good standing for more than one year.

(3) Capacity of the PHA to Administer a Section 8 Homeownership Program

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

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

8. Civil Rights Certifications

[24 CFR Part 903.12 (b), 903.7 (o)]

Civil rights certifications are included in the *PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations: Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans*, which is submitted to the Field Office in hard copy—see Table of Contents.

9. Additional Information

[24 CFR Part 903.12 (b), 903.7 (r)]

A. PHA Progress in Meeting the Mission and Goals Described in the 5-Year Plan

(Provide a statement of the PHA's progress against the goals and objectives established in the previous 5-Year Plan for the period FY 2000 - 2005.)

The Helena Housing Authority has made great strides in accomplishing our goals and objectives. The HHA has successfully used Tax Credit and HOME monies to build a 31 unit Tax Credit Project that will open in phases beginning in May 2005. We are still an active participant in both the Helena Area Task Force and the Home Choice Coalition.

The HHA has maintained high performer designation by scoring a 94 on their PHAS and continue to have a 100% on the SEMAP score.

The HHA will be providing training to the staff at the State and Regional NAHRO conferences.

The HHA has successfully installed security cameras on their sites and they have proven to be very effective in fighting the crime rate.

The Helena Housing Authority plans to continue with our recent successes.

B. Criteria for Substantial Deviations and Significant Amendments

(1) Amendment and Deviation Definitions

24 CFR Part 903.7(r)

PHAs are required to define and adopt their own standards of substantial deviation from the 5-year Plan and Significant Amendment to the Annual Plan. The definition of significant amendment is important because it defines when the PHA will subject a change to the policies or activities described in the Annual Plan to full public hearing and HUD review before implementation.

a. Substantial Deviation from the 5-Year Plan

b. Significant Amendment or Modification to the Annual Plan

C. Other Information

[24 CFR Part 903.13, 903.15]

(1) Resident Advisory Board Recommendations

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

If yes, provide the comments below:

Attached as mt004f06 ME Anderson Meeting Minutes.doc, mt004g06 ME Anderson Sign-Up Sheet.pdf, mt004h06 Resident Meeting.doc, and mt004i06 RMC Sign-Up Sheet.pdf

b. 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:

Changed the number of days you could have a registered guest from 14 days in a 12 month period to 14 days in a month and 30 days in a year.

Other: (list below)

(2) Resident Membership on PHA Governing Board

The governing board of each PHA is required to have at least one member who is directly assisted by the PHA, unless the PHA meets certain exemption criteria. Regulations governing the resident board member are found at 24 CFR Part 964, Subpart E.

a. Does the PHA governing board include at least one member who is directly assisted by the PHA this year?

Yes No:

If yes, complete the following:

Name of Resident Member of the PHA Governing Board:

Mary Cole

Judy Erickson

Method of Selection:

Appointment

The term of appointment is (include the date term expires): **2 years**

Mary Cole term expires 8/1/2006

Judy Erickson term expires 8/1/2005

Election by Residents (if checked, complete next section--Description of Resident Election Process)

Description of Resident Election Process

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)

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)

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)

b. 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):

Date of next term expiration of a governing board member: Judy Erickson 8/1/2005

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

**JIM SMITH MAYOR OF THE CITY OF HELENA
816 N PARK
HELENA, MT 59601**

(3) PHA Statement of Consistency with the Consolidated Plan

[24 CFR Part 903.15]

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

Consolidated Plan jurisdiction: City of Helena

a. 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 on its waiting list 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)
- b. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)**

City of Helena Growth Policy (Consolidated Plan) Adopted October 29, 2001

This plan recognizes the role of housing in sustaining a mixture of low, moderate, and high-income households in the City of Helena. A primary objective of managing growth is to achieve the overall mix and placement of housing needed to support a community rich in social, cultural, historical, age and economic diversity, and an environment rich with natural resources. Healthy communities maintain varied households and a combination of housing alternatives across all economic layers.

On the local level, the City of Helena has been actively involved in community housing needs. In January 1993, the Helena Area Housing Task Force was formed with representatives from emergency shelter providers, the Helena Housing Authority, City and County government, mental health service providers, low-income coalitions, Montana Advocacy Program, local realtors and lenders, the Montana Independent Living Project, homebuilders, and Habitat for Humanity. The mission of this group has been to seek solutions to the housing shortages for low-income families that are affordable and safe both in rental and home ownership markets in the Helena area.

The 1999 Greater Helena Area Comprehensive Housing Affordability Strategy noted thirteen housing needs for community residents which are noted below. This strategy will be updated on an annual basis.

1. Construction or rehabilitation of one-bedroom rentals, especially for renters at or below 50% of median income;
2. Creation of affordable single-family home ownership opportunities;
3. Preservation of existing HUD subsidized projects;
4. Work to accomplish zoning ordinances that are user friendly to the cause of affordable housing by identifying and modifying existing regulations that impede affordable housing;
5. Support construction of more Habitat for Humanity homes;
6. Create more transitional housing;
7. Investigate "mutual housing" opportunities;
8. Investigate public/private partnerships to create and provide affordable housing;
9. Establish a fund to help tenants with a portion of their utility/rent deposits;
10. Establish voice mail or pager system for clients on Section 8 waiting list;
11. Revise MDOC Section 8 payment standards;
12. Secure additional tenant-based Section 8 assistance; and
13. Seek project based funding for new construction of affordable housing.

8-7

(4) (Reserved)

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

10. Project-Based Voucher Program

- a. Yes No: Does the PHA plan to “project-base” any tenant-based Section 8 vouchers in the coming year? If yes, answer the following questions.
- b. Yes No: Are there circumstances indicating that the project basing of the units, rather than tenant-basing of the same amount of assistance is an appropriate option?

If yes, check which circumstances apply:

- Low utilization rate for vouchers due to lack of suitable rental units
- Access to neighborhoods outside of high poverty areas
- Other (describe below:) The HHA leaves open the option of Project Basing Vouchers in the future.

- c. Indicate the number of units and general location of units (e.g. eligible census tracts or smaller areas within eligible census tracts):

11. List of Supporting Documents Available for Review for Streamlined Five-Year/ Annual PHA Plans

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
X	<i>PHA Certifications of Compliance with the PHA Plans and Related Regulations and Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans.</i>	Standard 5 Year and Annual Plans; streamlined 5 Year Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan.	5 Year Plans
X	Fair Housing Documentation Supporting Fair Housing Certifications: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans
X	Housing Needs Statement of the Consolidated Plan for the jurisdiction(s) in which the PHA is located and any additional backup data to support statement of housing needs for families on the PHA’s public housing and Section 8 tenant-based waiting lists.	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O/ACOP), which includes the Tenant Selection and Assignment Plan [TSAP] and the Site-Based Waiting List Procedure.	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Any policy governing occupancy of Police Officers and Over-Income Tenants in Public Housing. <input checked="" type="checkbox"/> Check here if included in the public housing A&O Policy.	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the method 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
X	Schedule of flat rents offered at each public housing development. <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies (if included in plan, not necessary as a supporting document) and written analysis of Section 8 payment standard policies. <input checked="" type="checkbox"/> Check here if included in Section 8 Administrative Plan.	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation).	Annual Plan: Operations and Maintenance
X	Results of latest Public Housing Assessment System (PHAS) Assessment (or other applicable assessment).	Annual Plan: Management and Operations
X	Follow-up Plan to Results of the PHAS Resident Satisfaction Survey (if necessary)	Annual Plan: Operations and Maintenance and Community Service & Self-Sufficiency
X	Results of latest Section 8 Management Assessment System (SEMAP)	Annual Plan: Management and Operations
	Any policies governing any Section 8 special housing types <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Operations and Maintenance

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
	Consortium agreement(s).	Annual Plan: Agency Identification and Operations/ Management
X	Public housing grievance procedures <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures. <input checked="" type="checkbox"/> Check here if included in Section 8 Administrative Plan.	Annual Plan: Grievance Procedures
X	The Capital Fund/Comprehensive Grant Program Annual Statement /Performance and Evaluation Report for any active grant year.	Annual Plan: Capital Needs
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grants.	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans, or any other approved proposal for development of public housing.	Annual Plan: Capital Needs
	Self-evaluation, Needs Assessment and Transition Plan required by regulations implementing Section 504 of the Rehabilitation Act and the Americans with Disabilities Act. See PIH Notice 99-52 (HA).	Annual Plan: Capital Needs
	Approved or submitted applications for demolition and/or disposition of public housing.	Annual Plan: Demolition and Disposition
	Approved or submitted applications for designation of public housing (Designated Housing Plans).	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act, Section 22 of the US Housing Act of 1937, or Section 33 of the US Housing Act of 1937.	Annual Plan: Conversion of Public Housing
	Documentation for required Initial Assessment and any additional information required by HUD for Voluntary Conversion.	Annual Plan: Voluntary Conversion of Public Housing
X	Approved or submitted section 8 homeownership programs/plans.	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program (Section _____ of the Section 8 Administrative Plan)	Annual Plan: Homeownership
X	Public Housing Community Service Policy/Programs <input checked="" type="checkbox"/> Check here if included in Public Housing A & O Policy	Annual Plan: Community Service & Self-Sufficiency
X	Cooperative agreement between the PHA and the TANF agency and between the PHA and local employment and training service agencies.	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan(s) for public housing and/or Section 8.	Annual Plan: Community Service & Self-Sufficiency
X	Section 3 documentation required by 24 CFR Part 135, Subpart E for public housing.	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports for public housing.	Annual Plan: Community Service & Self-Sufficiency
X	Policy on Ownership of Pets in Public Housing Family Developments (as required by regulation at 24 CFR Part 960, Subpart G). <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Pet Policy
X	The results of the most recent fiscal year audit of the PHA conducted under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings.	Annual Plan: Annual Audit
	Consortium agreement(s), if a consortium administers PHA programs.	Joint PHA Plan for Consortia
	Consortia Joint PHA Plans ONLY: Certification that consortium agreement is in compliance with 24 CFR Part 943 pursuant to an opinion of counsel on file and available for inspection	Joint PHA Plan for Consortia
	Other supporting documents (optional). List individually.	(Specify as needed)

PHA Plan Table Library

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

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

Capital Fund Grant Number FFY of Grant Approval: (07/2005)

X Original Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	\$118,928
3	1408 Management Improvements	\$155,000
4	1410 Administration	\$65,000
5	1411 Audit	
6	1415 Liquidated Damages	
7	1430 Fees and Costs	\$ 65,000
8	1440 Site Acquisition	
9	1450 Site Improvement	\$35,250
10	1460 Dwelling Structures	\$182,734
11	1465.1 Dwelling Equipment-Nonexpendable	
12	1470 Non-dwelling Structures	
13	1475 Non-dwelling Equipment	\$7,500
14	1485 Demolition	
15	1490 Replacement Reserve	
16	1492 Moving to Work Demonstration	
17	1495.1 Relocation Costs	
18	1498 Mod Used for Development	
19	1502 Contingency	
20	Amount of Annual Grant (Sum of lines 2-19)	\$629,412
21	Amount of line 20 Related to LBP Activities	
22	Amount of line 20 Related to Section 504 Compliance	
23	Amount of line 20 Related to Security	
24	Amount of line 20 Related to Energy Conservation Measures	

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

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost	
HA Wide	Operations	1406	\$118,928	
	Management Improvements	1408	\$155,000	
	\$75,000 Police Officer			
	\$40,000 Social Service Contract			
	\$20,000 Organizational Management			
	\$10,000 Training			
	\$10,000 Computer Upgrades			
	Administration	1410	\$65,000	
	Fees and Costs-\$35,000	1430	\$50,000	
	\$30,000 Financial Consultants			
MT004001	Off Line Unit Mod-Rehab/Vacancy Unit Turnaround	1460	\$10,000	
	Computer Upgrades	1475	\$7,500	
	Replace all identified broken cracked or heaving sidewalks and drainage repairs	1450	\$9,875	
	Replace Storm Windows with new screens	1460	\$22,080	
	Water System isolation valve replacement	1460	\$7,200	
	MT004002	Replace all identified broken cracked or heaving sidewalks and drainage repairs	1450	\$7,875
		Replace Storm Windows with new screens	1460	\$24,440
	MT004003	Repair Edwards Street retaining wall	1450	\$2,500
	MT004003	Install water meter on each building	1460	\$2,880
	MT004004	Install air conditioners in units	1460	\$15,000
MT004004	Install heat tape on roof top downspouts	1460	\$1,800	
MT004004	Repair apartment door smoke seals	1460	\$1,960	
MT004004	Replace existing front door hardware/bump strikes and Handicap Button	1460	\$2,500	
MT004005	Sound walls in crawl space	1460	\$13,200	
MT004005	Replace dryer vent and crawl space vent	1460	\$4,400	
MT004005	Install water meter on each building	1460	\$5,280	

MT004006	Landscape Maintenance	1460	\$15,000
MT004006	Sound walls in crawl space	1460	\$10,800
MT004006	Replace dryer vent and crawl space vent	1460	\$2,200
MT004006	Install water meter on each building	1460	\$4,800
MT004008	Replace drapes and patio doors and screens	1460	\$30,994
MT004008	Replace drapes in bedroom	1460	\$7,200
MT004008	Replace existing front door hardware/bump strikes and Handicap Button	1460	\$2,500
MT004008	Install air conditioners in units	1460	\$13,500

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

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)	All Funds Expended (Quarter Ending Date)
Operations	6/30/08	6/30/10
Management Improvements	6/30/08	6/30/10
Administration	6/30/08	6/30/10
Fees and Costs	6/30/08	6/30/10
Site Improvements 4-1 4-2 4-3 4-6	6/30/08	6/30/10
Dwelling Structures 4-1 4-2 4-3 4-4 4-5 4-6 4-8	6/30/08	6/30/10
Non Dwelling Equipment	6/30/08	6/30/10

Capital Fund Program Five-Year Action Plan

Part I: Summary

PHA Name	Original 5-Year Plan				
Helena Housing Authority	Revision No:				
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2006 PHA FY: 2007	Work Statement for Year 3 FFY Grant: 2007 PHA FY: 2008	Work Statement for Year 4 FFY Grant: 2008 PHA FY: 2009	Work Statement for Year 5 FFY Grant: 2009 PHA FY: 2010
HA Wide	Annual Statement	\$ 409,008.00	\$ 427,732.00	\$ 412,648.64	\$ 425,507.08
MT 4-1		\$ -	\$ 14,400.00	\$ 84,100.00	\$ 187,259.00
MT 4-2		\$ 2,400.00	\$ 83,200.00	\$ 61,020.00	\$ 87,278.00
MT 4-3		\$ 156,270.00	\$ 103,340.00	\$ 78,000.00	\$ 70,860.00
MT 4-4		\$ 45,680.00	\$ 20,000.00	\$ 17,200.00	\$ 106,685.00
MT 4-5		\$ 37,500.00	\$ -	\$ 17,292.00	\$ 145,805.00
MT 4-6		\$ -	\$ -	\$ 29,928.00	\$ 85,194.00
MT 4-8		\$ 87,270.00	\$ 81,000.00	\$ 21,180.00	\$ 36,000.00
MT 4-10		\$ -	\$ -	\$ -	
Administration Building				\$ 6,000.00	\$ 15,680.00
CFP Funds Listed for 5-year planning		\$ 738,128.00	\$ 729,672.00	\$ 727,368.64	\$ 1,160,268.08
Replacement Housing Factor Funds					

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for

Activities for Year: 2

Activities for Year: 3

Year 1

FFY Grant: 2006

FFY Grant: 2007

PHA FY: 2007

PHA FY: 2008

Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost	
SEE ANNUAL STATEMENT	PHA Wide Management	Operations Police Officer	\$ 118,928.00	PHA Wide Management	Operations Police Officer	\$ 118,928.00
		Organizational Management	\$ 20,000.00		Organizational Management	\$ 29,200.00
		Social Services Contract	\$ 42,400.00		Upgrade Computers	\$ 10,000.00
		Training / Travel	\$ 10,000.00		Social Services Contract	\$ 44,944.00
					Training / Travel	\$ 10,000.00
		Administration Salaries	\$ 65,000.00		Administration Salaries	\$ 65,000.00
	A/E	Professional fees/Financial Consultants	\$ 67,680.00	A/E	Professional fees/Financial Consultants	\$ 64,660.00
	HA Wide	Off Line Modern Rehabilitation/Vacancy Unit Turnaround	\$ 10,000.00	HA Wide	Off Line Modern Rehabilitation/Vacancy Unit Turnaround	\$ 10,000.00
	MT004002	Repair/finish entry storage enclosure	\$ 2,400.00	MT004001	Replace bathroom exhaust fans	\$ 14,400.00
	MT004003	Reseal and re-strip parking lots	\$ 20,870.00	MT004002	Replace furnaces	\$ 83,200.00
	MT004003	Finish entries and laundry rooms	\$ 9,000.00	MT004003	Replace all bathroom exhaust fans	\$ 12,000.00
	MT004003	Replace hot water heaters	\$ 114,000.00	MT004003	Replace faucets on all bathroom lavatories	\$ 13,340.00
	MT004003	Install new washer/dryer boxes	\$ 12,400.00	MT004003	Replace furnaces	\$ 78,000.00
	MT004004	Replace patio door screens	\$ 8,000.00	MT004004	Air Conditioners	\$ 20,000.00
	MT004004	Replace patio door and bedroom drapes	\$ 37,680.00	MT004008	Replace Kitchen cabinets	\$ 81,000.00
MT004005	Install new irrigation system	\$ 37,500.00				
MT004008	Replace Entrance Door Hardware	\$ 4,500.00				
MT004008	Install smoke seals on all apartment doors	\$ 1,770.00				
MT004008	Replace kitchen casework	\$ 81,000.00				
Total CFP Estimated Cost		\$ 738,128.00			\$ 729,672.00	

MEMBERSHIP OF RESIDENT ADVISORY BOARD REQUIRED ATTACHMENT

The Helena Housing Authority has a Resident Management Corporation that acts in the capacity of Resident Advisory Board to the HHA.

The Resident Management Corporation (RMC) is a registered corporation with the State of Montana and has tax exempt status.

Membership

Any public housing resident is allowed membership into the RMC. The RMC elects a President, Vice-President and Secretary/Treasurer.

President: Mary Cole appointed 4-99 non-expiring term

Vice-President: Danny Romero appointed 4-03 non-expiring term

Sec/Treasurer Marguerite Santy appointed 4-03 non-expiring term

Meeting Dates

The RMC meets on a quarterly basis with minutes and attendance recorded at each meeting. The RMC records are stored at the HHA administrative building location at 812 Abbey.

K. DECONCENTRATION OF POVERTY AND INCOME-MIXING

HHA's admission policy is designed to provide for deconcentration of poverty and income-mixing by bringing higher income **residents** into lower income **campus** and lower income **residents** into higher income projects.

Nothing in the deconcentration policy relieves **HHA** of the obligation to meet the income targeting requirement.

Gross annual income is used for income limits at admission and for income-mixing purposes.

Deconcentration and Income-Mixing Goals

HHA's deconcentration and income-mixing goal, in conjunction with the requirement to target at least 40 percent of new admissions to public housing in each fiscal year to "extremely low-income families", will be to admit families above **HHA's** Established Income Range (EIR) to developments below the EIR, and families below **HHA's** EIR to developments above the EIR.

Deconcentration Applicability

*** HHA has covered developments (general occupancy, family developments) subject to the deconcentration requirement. These covered developments are described in the PHA Plan.**

Project Designation Methodology

Annually, **HHA** will determine the average income of all families residing in general occupancy developments.

HHA will then determine the average income of all families residing in each general occupancy development.

HHA will then determine whether each general occupancy development falls above, within or below the Established Income Range (EIR).

The EIR is 85 percent to 115 percent (inclusive of 85 percent and 115 percent) of the **HHA**-wide average income for general occupancy developments.

HHA will then determine whether or not developments outside the EIR are consistent with local goals and strategies in the PHA Plan. Any deconcentration policy as needed is described in the PHA Plan.

Deconcentration Policy

If, at annual review, there are found to be development(s) with average income above or below the EIR, and where the income profile for a general occupancy development above or below the EIR is not explained or justified in the PHA Plan, **HHA** shall list these covered developments in the PHA Annual Plan.

HHA shall adhere to the following policies for deconcentration of poverty and income mixing in applicable developments

***Skipping a family on the waiting list to reach another family in an effort to further the goals of HHA's deconcentration policy:**

If a unit becomes available at a development below the EIR, the first eligible family on the waiting list with income above the EIR will be offered the unit. If that family refuses the unit, the next eligible family on the waiting list with income above the EIR will be offered the unit. The process will continue in this order. For the available unit at the development below the EIR, if there is no family on the waiting list with income above the EIR, or no family with income above the EIR accepts the offer, then the unit will be offered to the first eligible family on the waiting list in preference order regardless of income.

If a unit becomes available at a development above the EIR, the first eligible family on the waiting list with income below the EIR will be offered the unit. If that family refuses the unit, the next eligible family on the waiting list with income below the EIR will be offered the unit. The process will continue in this order. For the available unit at the development above the EIR, if there is no family on the waiting list with income below the EIR, or no family with income below the EIR accepts the offer, then the unit will be offered to the first eligible family on the waiting list in preference order regardless of income.

Skipping of families for deconcentration purposes will be applied uniformly to all families.

A family has the sole discretion whether to accept an offer of a unit made under HHA's deconcentration policy. HHA shall not take any adverse action toward any eligible family for choosing not to accept an offer of a unit under HHA's deconcentration policy. However, HHA shall uniformly limit the number of offers received by applicants described in this Chapter.

*** HHA shall establish a preference for admission of working families in covered developments below the EIR.**

Deconcentration Compliance

If, at annual review, the average incomes at all general occupancy developments are within the Established Income Range, **HHA** will be considered to be in compliance with the deconcentration requirement.

Skipping on the waiting list will only be in effect for as long as it takes to bring the development into compliance with the deconcentration policy.

MEETING WITH ME ANDERSON FOR THE HELENA HOUSING AUTHORITY ANNUAL PLAN MARCH 14, 2005

THIS MEETING OF THE HELENA HOUSING AUTHORITY WAS HELD ON MONDAY, MARCH 14, 2005 AT 7:00 PM IN THE ME ANDERSON 2ND FLOOR LOUNGE.

STAFFPRESENT:
ANDREA GOETSCH
JEREMY RAND
BELINDA KNOFF
ADOLPH TIMM

BOARD MEMBERS PRESENT:

ME ANDERSON GUESTS:
(31) GUESTS, SEE SIGN IN SHEET ATTACHED
[41% OF BUILDING POPULATION](#)

FLOOR REPRESENTATION:

CAMPUS	FLOOR	NUMBER OF GUESTS	% OF FLOOR POPULATION
MT004004	1	9	75%
	2	5	36%
	3	3	22%
PERCENT OF BUILDING POPULATION			22%
MT004008	1	2	67%
	2	2	50%
	3	2	40%
	4	2	34%
	5	1	17%
	6	3	17%
	7	2	34%
PERCENT OF BUILDING POPULATION			19%

The Tenant Association meeting was called to order at 7:00 PM

Ms. Goetsch gave a brief overview of the Helena Housing Authority covering funding and expenses.

Ms. McCarthy gave an overview of the major changes in the ACOP plan. The following is a list of proposed changes with comments.

1. Security deposit changes. All were agreeable to have security deposits based on bedroom size.
2. Minimum rent increase. There was not any comments
3. Visitors of a resident can only be there 14 days in a 12 month period. There was much concern that this may not be enough time. Revised to say no more than 14 day in a month and no more than 30 days per year. Residents were in agreement
4. Absent from unit no more than 30 consecutive days in a 12-month period and no more than 60 total days in a 12 month period. Residents were fine with this change as long as there was a way to request an extension.

5. Violent Offender Appeal-There was a lot of concern about the safety of residents. The residents suggested that maybe they could have a couple people sit on the appeal board.

Mr. Timm talked about the Capital Improvement projects. The residents were very excited about the upcoming projects.

Ms. Goetsch ended the meeting, thanking everyone for attending.

SIGN UP SHEET FOR 3/14/05 ME ANDERSON MEETING

NAME	ADDRESS	
RICO J	MEA 217	4-8v
TOMMY G	MEA 111	4-4v
TAMI V.	MEA 218	4-8v
JIM FOLEY	MEA 314	4-8v
HARRY ABERNATHY	MEA	4-4v
KRISTINA	MEA 301	4-4v
Suzi McAndrew	MEA 312	4-4v
Lois Carlson	506	4-8v
Betsy Isfeld	apartment 701 E	4-8v
Ronnda McForman	# 206	4-4v
Ronnda Paerman	#602	4-8v
Gene Braere	107E	4-4v
Helen Eberode	205	4-4v
Pete Cabot	105	4-4v
Allen Klahn	211	4-4v
Wayne Lewis	406	4 48v
Elfridi Hasne	316	4-8v
Minnie Kitterman	404	4-8v
Veronica Waite	Apt 605	48v
DARWEN GOSSETT	113	4-4v
Ben Reynolds	101	4-4v
Thom Starn	270	4-4v
Lucy Murphy	804	4-4v
Joan Giff	101A	4-4v
George Farley	906	4-8v
WAGNE BRADLEN	106	4-4v
Joy Williams	115	48v
Gladie Christie	901	48v
Suzanne Chubb	1103	4-4v
Mary Gosshard	309	4-4v
Richard Gosshard	114	4-8v

MEETING WITH THE RESIDENT MANAGEMENT COROPORATION FOR THE HELENA HOUSING AUTHORITY ANNUAL PLAN MARCH 8, 2005

THIS MEEETING OF THE HELENA HOUSING AUTHORITY WAS HELD ON MONDAY, MARCH 08, 2005 AT 7:00 PM IN THE HELENA HOUSING AUTHORITY BOARD ROOM.

STAFFPRE SENT:
COLLEEN MCCARTHY
ADOLPH TIMM
ANDREA GOETSCH
BELINDA KNOFF
JEREMY RAND

BOARD MEMBERS PRESENT:
MARY COLE
JUDY ERICKSON

RESIDENTS:
(8) GUESTS, SEE SIGN IN SHEET ATTACHED

FLOOR REPRESENTATION:

CAMPUS	NUMBER OF GUESTS	% OF ATTENDANCE
MT004001	5	62.5%
MT004002	1	12.5%
MT004003	0	00%
MT004004	1	12.5%
MT004005	0	00%
MT004006	1	12.5%
MT004008	0	00%
MT004010	0	00%

Ms. McCarthy called the meeting to order at 7:00 PM

Ms. McCarthy gave a brief overview of the Helena Housing Authority covering funding, expenses, public relations and community development.

Ms. McCarthy gave an overview of the major changes in the ACOP plan. The following is a list of proposed changes with comments.

1. Security deposit changes. All were agreeable to have security deposits based on bedroom size.
2. Minimum rent increase. There was some concern if you didn't have any income how you would be able to come up with more money. Ms. McCarthy explained in those cases the individual could file for a hardship.
3. Visitors of a resident can only be there 14 days in a 12 month period. There was much concern that this may not be enough time. Revised to say no more than 14 day in a month and no more than 30 days per year.
4. Absent from unit no more than 30 consecutive days in a 12-month period and no more than 60 total days in a 12 month period. There was some concern if you were gone longer. Ms. McCarthy stated that there is a hardship request that would be granted by the Executive Director.
5. Violent Offender Appeal-There was discussion on if there would be a lot of violent people let into housing that would jeopardize the safety of the residents. Ms. McCarthy explained it would be a very strenuous process and that she only foresaw 3-4 people asking for an appeal.

Mr. Timm talked about the Capital Improvement projects.

Ms. McCarthy ended the meeting, thanking everyone for attending.

