

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

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# PHA Plans

5 Year Plan for Fiscal Years 2000 - 2004

Annual Plan for Fiscal Year 2000

**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: Missoula Housing Authority**

**PHA Number: MT33**

**PHA Fiscal Year Beginning: (mm/yyyy) 10/2000**

**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 2000 - 2004**

[24 CFR Part 903.5]

**A. Mission**

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

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- The PHA's mission is: (state mission here)  
*to provide decent, safe, affordable housing, and to foster among the people we serve self-sufficiency, economic independence, upward mobility and a sense of participation in the economic and political system.*

**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)
- PHA Goal: Improve the quality of assisted housing  
Objectives:
- Improve public housing management: (PHAS score)

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

**X 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)  
Operate Family Self-Sufficiency Program.

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

**X 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**

X 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**

X 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)

**Goal I: Operate existing housing programs for residents, program participants, and applicants in an efficient, effective, and equitable manner.**

**MHA=s GUIDING PRINCIPLES**

- Our work is founded on our property assets.
- New development activity shall be directed towards creation of rental property.
- MHA rental housing will serve populations that the private market cannot provide for, primarily, elderly, disabled, and smaller households.
- Projects featuring mixed income levels shall receive strong consideration.
- Rental housing design standards shall include:
  - ② project size between four and twelve units for family projects,
  - ② higher densities for elderly and special needs housing,

- ② good proximity to necessary services and public amenities,
- ② neighborhood compatibility,
- ② measures to insure efficient management and maintenance, and
- ② optimization of product quality at reasonable costs.
- MHA will continue to operate public housing, keeping the inventory at 210 units of public housing).
- Shift MHA-owned inventory toward multi-family configuration.
- MHA-owned PH should be of same quality (no better, no worse) as local market rate rental housing.
- Standardize physical plant, parts, systems. MHA maintenance department will only serve MHA-owned properties.
- MHA will seek to expand the Section 8 program, Shelter +Care program, and other assistance programs.
- MHA will become Missoula=s tax credit property management specialist for our own and other tax credit properties.
- MHA accomplishments will be promoted within the context of a community project and community success.
- MHA will seek to balance who we serve. Recognize that serving higher income households creates subsidy to serve very low income households.
- Increase MHA visibility in the community using professional marketing tools such as brochures, advertising, and community outreach.
- MHA staff and commissioners receive state-of-the-art training on a continuing basis..

### **Action Items: Year 2001**

#### **Agency-Wide:**

- a. Comply with Quality Housing and Work Responsibility Act of 1998 (QHWRA) by the end of Fiscal 2001.
- b. Improve Program Operations through grant funding & grant writing activities.
  - # Renew Shelter Plus Care grant for 50 units.
  - # Obtain AHP grant for \$262,500.
  - # Obtain \$1.86 Million tax credit allocation from Montana Board of Housing.
  - # Investigate sources of funds for Family Self Sufficiency Service Coordinator.
- c. Develop expanded office facility at new location: Construct 3,500 sf office facility and 1,000 sf shop as part of Russell Square development.
- d. Implement employee performance review system.
- e. Continue OSHA compliance program for maintenance.
- f. Evaluate voice-mail for receptionist function (always human voice first).
- g. Explore use of video, other media to improve communications with customers.

### **Low Rent Public Housing Program Activities**

- a. Implement sale and replacement housing plan for 45 units of public housing:
  - # Obtain HUD approval for disposition.
  - # Contract for Housing Search Advocate services for relocated families.
  - # Contract for MLS/broker services and moving services.
  - # Successfully relocate 25 families by the fall of 2000.
  - # Sell 25 of the 45 public housing units.
- b. Revise Public Housing Admin Plan.
- c. Review MHA=s Alocal@ admissions preference system.
- d. Revise lease and tenant handbook.
- e. Revise pet policies.
- f. Implement tenant community service requirements.
- g. Implement Aflat rent@ structure and alternative rent system in administrative policy.
- h. Establish preventative maintenance plan.
- I. Continue HUD-prescribed systems inspection protocol-
- j. Continue random 5% third-party HQS re-inspection system.
- k. Implement system for asset management.
- l. Implement Uniform Physical Condition Standards (UPCS) Inspection System.

### **Section 8 Voucher Rental Assistance Program Activities**

- a. Revise admin plan.
- b. Implement random third-party HQS re-inspection system.
- c. Establish project-based Section 8 assistance in support of transitional housing.
- d. Apply for additional Section 8 vouchers.

### **Shelter Plus Care Program Activities**

- a. Establish admin plan.

### **Action Items: Years 2002-2005**

- a. Create or help create more transitional housing
- b. Sell remaining 20 units of public housing in 2001 (from the sale and replacement plan of 2000).
- c. Continue asset management of MHA properties.
- d. Further develop plan for public housing (small family) project on Orchard Promenade site.
- e. Further develop plan for public housing (small family) project on Franklin Street site.



**Goal II: Build rapport and working relationship with political entities.**

**Goal III: Develop leadership position in the community for advocacy of equitable housing policy and development of affordable housing**

**MHA=s GUIDING PRINCIPLES**

The MHA shall champion provision of equitable housing opportunity and development of affordable housing on behalf of those least able to advocate for themselves by:

- ② active marketing of its programs to the community, and
- ② advocating for the housing needs of low-income persons in matters of community housing policy and land use regulation.

The MHA shall be a credible local expert on housing policy and affordable housing development by:

- ② providing the community with quality data on housing and housing needs,
- ② educating the community about housing issues and policy, and
- ② developing a public relations and media plan focusing on those served and in need rather than the agency.

Promote our organizational values: MHA is progressive, professional, entrepreneurial, empathetic, committed, dynamic.

Offer opportunities for staff=s community involvement.

The MHA will support the efforts of other agencies to create home ownership opportunities for low-income persons.

**Action Items: Year 2001**

- a. Prepare MHA Annual Report and present to Mayor and City Council each year.
- b. Maintain active participation in NAHRO events and meetings.
- c. Renew Housing Coordinator contract with City of Missoula.
- d. Members of MHA Management team to rotate attendance at City Senior Management Team meetings as time permits and report relevant information to staff and board.
- e. CEO, staff and board members to attend city council meetings and make presentations during Authority reporting time @. Purpose of the presentations is to address issues concerning the customers that MHA serves and foster public awareness of problems associated with the development of affordable housing.
- f. Identify roles for board members and staff in public housing policy development and encourage participation of willing board members and staff on other relevant boards such as planning board, economic development bodies, etc.

- g. Advise and assist wherever possible in the development of city/county housing policy and regulations.
- h. Continue to participate in housing/services provider alliance.
- I. Use a focus group to consider how we appear to the community - and do we want to change the perception?
- j. Explore the use of video, other media for communicating with the community.

**Action Items: Years 2002-2005**

- a. Actively participate in Missoula housing policy development and land use planning issues. MHA to comment on major local public policy and land use issues and assess how policy/issue may affect housing/affordable housing.
- b. CEO and board members develop relationships with key persons at print, radio, and TV media to promote affordable housing, advocate interests of MHA=s target populations, and offer services as information source to comment on news that impacts target populations and affordable housing.
- c. Using 2000 Census data to update McQuistin report.
- d. MHA self-education/sponsorship of seminars to educate community.
- e. Director to annually visit local service groups, associations.

**Goal IV: Provide accurate, timely housing data to the community for public information, public policy development, and land use planning.**

**MHA=s GUIDING PRINCIPLES**

- Serve as a leading resource for Missoula housing information and analysis.
- Provide information & referral expertise for all customers.

**Action Items: Year 2001**

- a. Provide policy research & quality housing data for Council & Mayor .
- b. Maintain partnership with Missoula Housing Corporation.
- c. Place copies of all produced housing data and information in Missoula Public Library as soon as possible after publishing.
- d. Staff and board members present facts and data in regard to affordable housing at planning board meetings, zoning adjustment hearings, and other public venues.
- e. Investigate costs and benefits of developing a MHA web page.

**Action Items: Years 2002-2005**

- a. Continue Housing Coordinator research activities.
- b. Regularly consult with data users to assess data and information needs and evaluate usefulness of provided data.

c. Establish an information and data library for use by staff, board, and members of the public to study housing matters.

**Goal V: Engage in entrepreneurial activities to develop housing and reduce dependence on HUD funding.**

**MHA=s GUIDING PRINCIPLES**

- Lead in innovative housing development.
- Pursue opportunities to purchase residential-zoned land.
- Explore opportunities to partner with other non-profits and for-profit developers.

**Action Items: Year 2001**

- a. Construct 53 units of tax credit rental housing at Russell Square
- b. Develop a mixed use project: first floor commercial with elderly above (Russell Square).

**Action Items: Years 2002-2005**

- a. Build 45 new PH units to replace 45 sold.
- b. Double physical assets in next five years (double number of housing units).
- c. Consider developing low-income condos (opportunity for home ownership).
- d. Add 150 units of non-HUD-subsidized housing to MHA inventory.
- e. Continue to develop external sources of development capital.
- f. Advocate needed changes to state and federal law and regulation at NAHRO meetings and other events.
- g. Explore development of mixed income housing projects for replacement units.
- h. Look for opportunities to participate in master planned development with builders.

**Goal VI: Foster the self-sufficiency and financial independence of MHA residents and program participants.**

**MHA=s GUIDING PRINCIPLES**

- MHA customer services shall focus primarily on low-income persons who are residents of public housing or participants in the Shelter plus Care or the Section 8 Voucher programs.
- MHA recognizes two primary kinds of customers that require different kinds of services:
  - ② elderly or disabled persons with fixed incomes, and
  - ② low-income households that may be able to increase their incomes over time and move toward self-sufficiency.
- The MHA shall coordinate and facilitate delivery of community-based supportive services to its tenant customers, with an emphasis on basic life skills.

- MHA social services programs shall distinguish between those who can attain independence from public assistance and those are likely to require more permanent housing and design and deliver services accordingly.
- The welfare-to-work model shall be the basis for design of social services programs for low-income households with the potential for increased earnings.
- Whenever possible, support home ownership for low and moderate income customers.
- Whenever possible, empower residents and program participants.

### **Action Items: Year 2001**

- a. Continue to support Missoula=s NeighborWorks program.
- b. Continue to act as broker for social services for our customers.
- c. Establish and provide administrative support for a Resident Advisory Board.

### **Action Items: Years 2002-2005**

- a. Hire person(s) to advocate/help MHA customers physically move through the service agencies.
- b. Work with a UofM intern (in social work) to serve as customer advocates or Resident Advisory Board facilitator.
- c. Consider continuation of FSS program using non-HUD funds.
- d. Hire a full-time Housing Search Assistant/Life Skills Trainer to work with customers. Assistance to include help toward home ownership where feasible.
- e. Hire a social service coordinator/broker for seniors.

**Annual PHA Plan**  
**PHA Fiscal Year 2000**

[24 CFR Part 903.7]

**i. Annual Plan Type:**

Select which type of Annual Plan the PHA will submit.

**Standard Plan**

**Streamlined Plan:**

- X **High Performing PHA**
- X **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.

The Missoula Housing Authority (MHA) FY2001 Annual Plan covers the period October 1, 2000 through September 30, 2001. All sections are included in this submittal.

The MHA Annual Plan reflects the fact that Missoula will continue to be a relatively expensive housing market in Montana, requiring an annual income of at least \$24,120 for a family to be able to affordably rent a two-bedroom apartment.

In the coming year, the MHA will continue to effectively manage our existing inventory of 210 public housing units, 532 Section 8 vouchers, 40 Welfare-to-Work vouchers, and 87 Shelter Plus Care vouchers.

Forty-five public housing units (most of which are single family homes) are proposed for sale over the next two years, to be replaced by more efficient one- and two-bedroom multi-family public housing units.

At the same time, we are actively developing new properties as affordable multi-family housing to be owned and managed by the MHA as non-public housing units. The new rental housing will be on multi-family sites scattered throughout the Missoula urban area.

Starting in the fall of 2000, MHA will break ground on 53 new one- and two-bedroom apartments and a new administrative office facility, to be located at the Russell Square complex at 39th Street and Russell.

The Annual Plan references all of the changes required to date as a result of the Quality Housing and Work Responsibility Act of 1998 (QHWRA).

### **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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Other Information

**Attachments**

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

Required Attachments:

- X Admissions Policy for Deconcentration: **mt033a01**  
FY 2000 Capital Fund Program Annual Statement: included in FY 2000 Plan Text  
Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

Optional Attachments:

- PHA Management Organizational Chart  
 FY 2000 Capital Fund Program 5 Year Action Plan  
 Public Housing Drug Elimination Program (PHDEP) Plan  
X Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text): **mt033b01**  
 Other (List below, providing each attachment name)

## 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
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with 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	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance</i> ; <i>Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents X check here if included in the public housing A & O Policy	Annual Plan: Rent Determination



<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	Schedule of flat rents offered at each public housing development X check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies X check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
NA	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures X check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures X check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
X	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	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 (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

# 1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

## A. Housing Needs of Families in the Jurisdiction/s Served by the PHA

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

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	4,800	5	5	2	2	NA	NA
Income >30% but <=50% of AMI	4,160	5	5	2	2	NA	NA
Income >50% but <80% of AMI	5,440	4	4	2	2	NA	NA
Elderly	2,552	5	5	3	3	NA	NA
Families with Disabilities	7,664	4	4	2	4	NA	NA
Race/Ethnicity	NA	NA	NA	NA	NA	NA	NA
Race/Ethnicity	NA	NA	NA	NA	NA	NA	NA
Race/Ethnicity	NA	NA	NA	NA	NA	NA	NA
Race/Ethnicity	NA	NA	NA	NA	NA	NA	NA

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: 1999
- U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") dataset
- American Housing Survey data  
Indicate year:
- Other housing market study  
Indicate year: 1999
- 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 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/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	478		350 (approx 75%)
Extremely low income <=30% AMI	336	70%	
Very low income (>30% but <=50% AMI)	125	26%	
Low income (>50% but <80% AMI)	17	4%	
Families with children	223	47%	
Elderly families	54	11%	
Families with Disabilities	177	37%	
Race/ethnicity: white	421	88%	
Race/ethnicity: black	4	1%	
Race/ethnicity: Native American	50	10%	
Race/ethnicity: Asian	3	1%	
Characteristics by Bedroom Size (Public Housing Only)		% of PH Waiting List (228 total)	
1BR	97	43%	NA
2 BR	101	44%	NA
3 BR	24	10%	NA
4 BR	6	3%	NA
5 BR	0		NA
5+ BR	0		NA

## Housing Needs of Families on the Waiting List

Is the waiting list closed (select one)? X No  Yes

If yes:

How long has it been closed (# of months)?

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

### 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

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

**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)  
Construct new elderly housing

**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)  
Develop housing for families with disabilities

**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)**

Participate in the state and local homeless provider networks.

Develop new office space in order to increase administrative efficiency and effectiveness.

Refer to the 5 Year Plan for additional MHA strategies.

**(2) Reasons for Selecting Strategies**

Of the factors listed below, select all that influenced the PHA's selection of the strategies it will pursue:

- Funding constraints
- Staffing constraints
- Limited availability of sites for assisted housing
- Extent to which particular housing needs are met by other organizations in the community

- Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
- Influence of the housing market on PHA programs
- Community priorities regarding housing assistance
- Results of consultation with local or state government
- Results of consultation with residents and the Resident Advisory Board
- Results of consultation with advocacy groups
- Other: (list below)



## **2. Statement of Financial Resources**

[24 CFR Part 903.7 9 (b)]

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

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2000 grants)</b>	2	
a) Public Housing Operating Fund	245,625	
b) Public Housing Capital Fund	513,600	
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	2,445,834	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants		
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
99 CIAP	250,540	
<b>3. Public Housing Dwelling Rental Income</b>		
	420,437	
<b>4. Other income (list below)</b>		
<b>4. Non-federal sources (list below)</b>		
<b>Total resources</b>		

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses

### **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: (10)  
 When families are within a certain time of being offered a unit: (state time)  
 Other: (describe)

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

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

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

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

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

##### **(2)Waiting List Organization**

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

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

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

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

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

1. How many site-based waiting lists will the PHA operate in the coming year?
2.  Yes  No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD-approved site based waiting list plan)?  
If yes, how many lists?
3.  Yes  No: May families be on more than one list simultaneously  
If yes, how many lists?
4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?
  - PHA main administrative office
  - All PHA development management offices
  - Management offices at developments with site-based waiting lists
  - At the development to which they would like to apply
  - Other (list below)

**(3) Assignment**

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

- X One
- Two
- Three or More

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

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

**(4) Admissions Preferences**

a. Income targeting:

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

b. Transfer policies:

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

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

c. Preferences

1.  Yes  No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If “no” is selected, skip to subsection **(5) Occupancy**)
  
2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences:

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

Other preferences: (select below)

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

- Victims of reprisals or hate crimes
- X Other preference(s) (list below)
  - Preference based on government disaster or government action
  - Preference for elderly, disabled, or families over single applicants

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.

2 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

- 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
- 1 Other preference(s) (list below)
  - Preference based on government disaster or government action
  - Preference for elderly, disabled, or families over single applicants

4. Relationship of preferences to income targeting requirements:

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

**(5) Occupancy**

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

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

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

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

**(6) Deconcentration and Income Mixing**

a.  Yes X No: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?

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

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

- Adoption of site-based waiting lists  
If selected, list targeted developments below:
- X Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments  
If selected, list targeted developments below:
- Employing new admission preferences at targeted developments  
If selected, list targeted developments below:
- X Other (list policies and developments targeted below)  
Adopted Deconcentration Plan

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

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

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

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

X Not applicable: results of analysis did not indicate a need for such efforts

List (any applicable) developments below:

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

X Not applicable: results of analysis did not indicate a need for such efforts

List (any applicable) developments below:

## B. Section 8

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

### (1) Eligibility

- a. What is the extent of screening conducted by the PHA? (select all that apply)
- Criminal or drug-related activity only to the extent required by law or regulation
  - Criminal and drug-related activity, more extensively than required by law or regulation
  - More general screening than criminal and drug-related activity (list factors below)
  - Other (list below)
- b. X Yes  No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- c. X Yes  No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- d. X 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)  
Rental references

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

If yes, state circumstances below:

- Reasonable accommodation
- Medical necessity
- Large, hard to house, families

**(4) Admissions Preferences**

- a. Income targeting

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

- b. Preferences

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

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

Former Federal preferences

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- Victims of domestic violence
- Substandard housing
- Homelessness
- 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
- X Other preference(s) (list below)
  - Preference based on government disaster or government action
  - Preference for elderly, disabled, or families over single applicants

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.

2 Date and Time

Former Federal preferences

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

Other preferences (select all that apply)

- 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
- 1 Other preference(s) (list below)

- Preference based on government disaster or government action
- Preference for elderly, disabled, or families over single applicants

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

- X 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)

Outreach to other agencies

Newspaper articles

## **4. PHA Rent Determination Policies**

[24 CFR Part 903.7 9 (d)]

### **A. Public Housing**

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

#### **(1) Income Based Rent Policies**

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

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

Hardship Rent Policy

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

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

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

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

For the earned income of a previously unemployed household member

For increases in earned income

Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

Fixed percentage (other than general rent-setting policy)

If yes, state percentage/s and circumstances below:

For household heads

For other family members

For transportation expenses

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

Other (describe below)

e. Ceiling rents

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

Yes for all developments

Yes but only for some developments

No

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

For all developments

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

For specified general occupancy developments

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

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

Other (list below)

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

Market comparability study

Fair market rents (FMR)

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

f. Rent re-determinations:

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

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

g.  Yes X 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
- X Other (list/describe below)  
Property Management analysis of local market

## 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: EXEMPT**

[24 CFR Part 903.7 9 (e)]

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

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

Describe the PHA's management structure and organization.

(select one)

An organization chart showing the PHA's management structure and organization is attached.

A brief description of the management structure and organization of the PHA follows:

### **B. HUD Programs Under PHA Management**

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

<b>Program Name</b>	<b>Units or Families Served at Year Beginning</b>	<b>Expected Turnover</b>
Public Housing	210	63
Section 8 Vouchers	531	160
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers		
Welfare-to-Work	40	12
Shelter Plus Care	87	26
Public Housing Drug Elimination Program (PHDEP)		
Other Federal Programs(list individually)		

### **C. Management and Maintenance Policies**

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

- (1) Public Housing Maintenance and Management: (list below)  
Admissions and Continued Occupancy Plan for the MHA Public Housing Program
- (2) Section 8 Management: (list below)  
Section 8 Administrative Plan

## **PHA Grievance Procedures: EXEMPT**

[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 (state name)

-or-

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

## 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 MT06P03350100 FFY of Grant Approval: (10/2000)

Original Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	155,533
3	1408 Management Improvements	0
4	1410 Administration	80,000
5	1411 Audit	0
6	1415 Liquidated Damages	0
7	1430 Fees and Costs	15,000
8	1440 Site Acquisition	0
9	1450 Site Improvement	79,000
10	1460 Dwelling Structures	151,500
11	1465.1 Dwelling Equipment-Nonexpendable	22,000
12	1470 Nondwelling Structures	0
13	1475 Nondwelling Equipment	13,000
14	1485 Demolition	0
15	1490 Replacement Reserve	0
16	1492 Moving to Work Demonstration	0
17	1495.1 Relocation Costs	0
18	1498 Mod Used for Development	0
19	1502 Contingency	0
20	<b>Amount of Annual Grant (Sum of lines 2-19)</b>	<b>516,033</b>
21	Amount of line 20 Related to LBP Activities	0
22	Amount of line 20 Related to Section 504 Compliance	0
23	Amount of line 20 Related to Security	0

**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	<b>Operations</b>	<b>1406</b>	
HA Wide	Computer upgrades	1406	15,000
HA Wide	New construction of PH offices	1406	50,000
HA Wide	PH Leasing/Marketability	1406	12,617
HA Wide	Maintenance personnel salaries	1406	69,916
HA Wide	Window covering replacement allowance	1406	8,000
HA Wide	<b>Management Improvements</b>	<b>1408</b>	0
HA Wide	<b>Administration</b>	<b>1410</b>	
HA Wide	Salaries	1410	80,000
HA Wide	<b>Liquidated Damages</b>	<b>1415</b>	0
HA Wide	<b>Fees and Costs</b>	<b>1430</b>	
	HA-Wide Energy Audit	1430	15,000
HA Wide	<b>Site Acquisition</b>	<b>1440</b>	0
HA Wide	<b>Site Improvement</b>	<b>1450</b>	0
HA Wide	<b>Dwelling Structures</b>	<b>1460</b>	
HA Wide	Replace garage doors	1460	10,000
HA Wide	Allowance: Replace vinyl/carpeting	1460	20,000
HA Wide	Painting	1460	30,000
HA Wide	<b>Dwelling Equip - nonexpendable</b>	<b>1465.1</b>	
HA Wide	Appliance replacement	1465.1	22,000
HA Wide	<b>Nondwelling Structures</b>	<b>1470</b>	0
HA Wide	<b>Nondwelling Equipment</b>	<b>1475</b>	
HA Wide	New maintenance vehicle	1475	10,000
HA Wide	Snow plow for truck	1475	3,000
HA Wide	<b>Demolition</b>	<b>1485</b>	0
HA Wide	<b>Relocation Cost</b>	<b>1495.1</b>	0
HA Wide	<b>Mod Used for Development</b>	<b>1498</b>	0

HA Wide	<b>TOTAL -</b>	<b>All Accounts</b>	<b>\$345,533</b>
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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
<b>MT33-001</b>	<b>Operations</b>	<b>1406</b>	0
	<b>Management Improvements</b>	<b>1408</b>	0
	<b>Administration</b>	<b>1410</b>	0
	<b>Liquidated Damages</b>	<b>1415</b>	0
	<b>Fees and Costs</b>	<b>1430</b>	0
	<b>Site Acquisition</b>	<b>1440</b>	0
	<b>Site Improvement</b>	<b>1450</b>	0
	Install u.g. sprinkler at 1028 Toole, Spruce	1450	5,000
	Site Concrete Repair	<b>1450</b>	3,100
	<b>Dwelling Structures</b>	<b>1460</b>	0
	<b>Dwelling Equip - nonexpendable</b>	<b>1465.1</b>	0
	<b>Nondwelling Structures</b>	<b>1470</b>	0
	<b>Nondwelling Equipment</b>	<b>1475</b>	0
	<b>Demolition</b>	<b>1485</b>	0
	<b>Relocation Cost</b>	<b>1495.1</b>	0
	<b>Mod Used for Development</b>	<b>1498</b>	0
<b>MT33-001</b>	<b>TOTAL -</b>	<b>All Accounts</b>	<b>\$8,100</b>



Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
<b>MT33-002 VANTAGE VILLA</b>	<b>Operations</b>	<b>1406</b>	0
	<b>Management Improvements</b>	<b>1408</b>	0
	<b>Administration</b>	<b>1410</b>	0
	<b>Liquidated Damages</b>	<b>1415</b>	0
	<b>Fees and Costs</b>	<b>1430</b>	0
	<b>Site Acquisition</b>	<b>1440</b>	0
	<b>Site Improvement</b>	<b>1450</b>	0
	Site Concrete Repair	1450	3,100
	<b>Dwelling Structures</b>	<b>1460</b>	0
	<b>Dwelling Equip - nonexpendable</b>	<b>1465.1</b>	0
	<b>Nondwelling Structures</b>	<b>1470</b>	0
	<b>Nondwelling Equipment</b>	<b>1475</b>	0
	<b>Demolition</b>	<b>1485</b>	0
	<b>Relocation Cost</b>	<b>1495.1</b>	0
	<b>Mod Used for Development</b>	<b>1498</b>	0
<b>MT33-002</b>	<b>TOTAL -</b>	<b>All Accounts</b>	<b>\$3,100</b>

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
<b>MT33-003</b> <b>Pullman, Charlo,</b> <b>Butte, N. 6<sup>th</sup>,</b> <b>Worden, Stoddard,</b> <b>S. 8<sup>th</sup> W.</b> <b>Multi-Family</b>	<b>Operations</b>	<b>1406</b>	0
	<b>Management Improvements</b>	<b>1408</b>	0
	<b>Administration</b>	<b>1410</b>	0
	<b>Liquidated Damages</b>	<b>1415</b>	0
	<b>Fees and Costs</b>	<b>1430</b>	0
	<b>Site Acquisition</b>	<b>1440</b>	0
	<b>Site Improvement</b> Site Concrete Repair	<b>1450</b> 1450	0 5,580
	<b>Dwelling Structures</b> Re-side Pullman (MF)	<b>1460</b> 1460	21,000
	<b>Dwelling Equip - nonexpendable</b>	<b>1465.1</b>	0
	<b>Nondwelling Structures</b>	<b>1470</b>	0
	<b>Nondwelling Equipment</b>	<b>1475</b>	0
	<b>Demolition</b>	<b>1485</b>	0
	<b>Relocation Cost</b>	<b>1495.1</b>	0
	<b>Mod Used for Development</b>	<b>1498</b>	0
<b>MT33-003</b>	<b>TOTAL -</b>	<b>All Accounts</b>	<b>\$26,580</b>

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
<b>MT33-008</b> Scattered <b>Single Family</b>	<b>Operations</b>	<b>1406</b>	0
	<b>Management Improvements</b>	<b>1408</b>	0
	<b>Administration</b>	<b>1410</b>	0
	<b>Liquidated Damages</b>	<b>1415</b>	0
	<b>Fees and Costs</b>	<b>1430</b>	0
	<b>Site Acquisition</b>	<b>1440</b>	0
	<b>Site Improvement</b>	<b>1450</b>	0
	Site Concrete Repair	1450	2,480
	<b>Dwelling Structures</b>	<b>1460</b>	0
	<b>Dwelling Equip - nonexpendable</b>	<b>1465.1</b>	0
	<b>Nondwelling Structures</b>	<b>1470</b>	0
	<b>Nondwelling Equipment</b>	<b>1475</b>	0
	<b>Demolition</b>	<b>1485</b>	0
	<b>Relocation Cost</b>	<b>1495.1</b>	0
	<b>Mod Used for Development</b>	<b>1498</b>	0
<b>MT33-008</b>	<b>TOTAL -</b>	<b>All Accounts</b>	<b>\$2,480</b>

<i>Development Number/Name</i> HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
<b>MT33-009</b> Toole, Phillips Multi-Family	<b>Operations</b>	<b>1406</b>	0
	<b>Management Improvements</b>	<b>1408</b>	0
	<b>Administration</b>	<b>1410</b>	0
	<b>Liquidated Damages</b>	<b>1415</b>	0
	<b>Fees and Costs</b>	<b>1430</b>	0
	<b>Site Acquisition</b>	<b>1440</b>	0
	<b>Site Improvement</b>	<b>1450</b>	
	New fence, outside storage boxes @ Toole MF site	1450	5,000
	Site concrete repair	1450	1,550
	<b>Dwelling Structures</b>	<b>1460</b>	0
	Re-side dplxes @ 1613 & 1609 Phillips	1460	30,000
	Replace ext. windows @ Pullman	1460	3,500
	<b>Dwelling Equip - nonexpendable</b>	<b>1465.1</b>	0
	<b>Nondwelling Structures</b>	<b>1470</b>	0
	<b>Nondwelling Equipment</b>	<b>1475</b>	0
	<b>Demolition</b>	<b>1485</b>	0
	<b>Relocation Cost</b>	<b>1495.1</b>	0
	<b>Mod Used for Development</b>	<b>1498</b>	0
<b>MT33-009</b>	<b>TOTAL -</b>	<b>All Accounts</b>	<b>\$40,050</b>

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
<b>MT33-011</b> S. 4 <sup>th</sup> W., Russell Pk & Single-Family	<b>Operations</b>	<b>1406</b>	0
	<b>Management Improvements</b>	<b>1408</b>	0
	<b>Administration</b>	<b>1410</b>	0
	<b>Liquidated Damages</b>	<b>1415</b>	0
	<b>Fees and Costs</b>	<b>1430</b>	0
	<b>Site Acquisition</b>	<b>1440</b>	0
	<b>Site Improvement</b>	<b>1450</b>	
	Replace deck @ 2244 E. Vista	1450	2,000
	Site concrete Repair	1450	3,410
	<b>Dwelling Structures</b>	<b>1460</b>	
	Re-side SF houses: 2324 W. Summit, 2244 E. Summit,	1460	
	4 Russell Park, 2244 E. Vista	1460	24,000
	<b>Dwelling Equip - nonexpendable</b>	<b>1465.1</b>	0
	<b>Nondwelling Structures</b>	<b>1470</b>	0
	<b>Nondwelling Equipment</b>	<b>1475</b>	0
	<b>Demolition</b>	<b>1485</b>	0
	<b>Relocation Cost</b>	<b>1495.1</b>	0
	<b>Mod Used for Development</b>	<b>1498</b>	0
<b>MT33-011</b>	<b>TOTAL -</b>	<b>All Accounts</b>	<b>\$29,410</b>

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
<b>MT33-012</b> Russell Pk, Dplx, & Single-Family	<b>Operations</b>	<b>1406</b>	0
	<b>Management Improvements</b>	<b>1408</b>	0
	<b>Administration</b>	<b>1410</b>	0
	<b>Liquidated Damages</b>	<b>1415</b>	0
	<b>Fees and Costs</b>	<b>1430</b>	0
	<b>Site Acquisition</b>	<b>1440</b>	0
	<b>Site Improvement</b>	<b>1450</b>	
	Repair deck at 52 Russell Park	1450	2,000
	Site Concrete Repair	1450	4,340
	<b>Dwelling Structures</b>	<b>1460</b>	
	Upgrade windows at Russell Park	1460	25,000
	Re-side SF houses: 32 Russell Park, 2328 W. Summit	1460	12,000
	<b>Dwelling Equip - nonexpendable</b>	<b>1465.1</b>	0
	<b>Nondwelling Structures</b>	<b>1470</b>	0
	<b>Nondwelling Equipment</b>	<b>1475</b>	0
	<b>Demolition</b>	<b>1485</b>	0
	<b>Relocation Cost</b>	<b>1495.1</b>	0
	<b>Mod Used for Development</b>	<b>1498</b>	0
<b>MT33-012</b>	<b>TOTAL -</b>	<b>All Accounts</b>	<b>\$43,340</b>

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
<b>MT33-014</b> Scattered <b>Single Family</b>	<b>Operations</b>	<b>1406</b>	0
	<b>Management Improvements</b>	<b>1408</b>	0
	<b>Administration</b>	<b>1410</b>	0
	<b>Liquidated Damages</b>	<b>1415</b>	0
	<b>Fees and Costs</b>	<b>1430</b>	0
	<b>Site Acquisition</b>	<b>1440</b>	0
	<b>Site Improvement</b>	<b>1450</b>	
	Repair decks at 2311 W. Summit,	1450	4,000
	5614 Hillview	1450	6,200
	Site Concrete Repair		
	<b>Dwelling Structures</b>	<b>1460</b>	
	Re-side SF house: 2235 E. Vista	1460	6,000
	<b>Dwelling Equip - nonexpendable</b>	<b>1465.1</b>	0
	<b>Nondwelling Structures</b>	<b>1470</b>	0
	<b>Nondwelling Equipment</b>	<b>1475</b>	0
	<b>Demolition</b>	<b>1485</b>	0
	<b>Relocation Cost</b>	<b>1495.1</b>	0
	<b>Mod Used for Development</b>	<b>1498</b>	0
<b>MT33-014</b>	<b>TOTAL -</b>	<b>All Accounts</b>	<b>\$16,200</b>

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
<b>MT33-018</b> Grandview Single Family	<b>Operations</b>	<b>1406</b>	0
	<b>Management Improvements</b>	<b>1408</b>	0
	<b>Administration</b>	<b>1410</b>	0
	<b>Liquidated Damages</b>	<b>1415</b>	0
	<b>Fees and Costs</b>	<b>1430</b>	0
	<b>Site Acquisition</b>	<b>1440</b>	0
	<b>Site Improvement</b> Site Concrete Repair	<b>1450</b> 1450	1,240
	<b>Dwelling Structures</b>	<b>1460</b>	
	<b>Dwelling Equip - nonexpendable</b>	<b>1465.1</b>	0
	<b>Nondwelling Structures</b>	<b>1470</b>	0
	<b>Nondwelling Equipment</b>	<b>1475</b>	0
	<b>Demolition</b>	<b>1485</b>	0
	<b>Relocation Cost</b>	<b>1495.1</b>	0
	<b>Mod Used for Development</b>	<b>1498</b>	0
<b>MT33-018</b>	<b>TOTAL -</b>	<b>All Accounts</b>	<b>\$1,240</b>



## 2000 Capital Fund Summary by Development

<b>2000 Capital Fund Summary by Development</b>			
<b>HA WIDE</b>	<b>TOTAL -</b>	<b>All Accounts</b>	<b>\$345,533</b>
MT33-001	TOTAL -	All Accounts	\$8,100
MT33-002	TOTAL -	All Accounts	\$3,100
MT33-003	TOTAL -	All Accounts	\$26,580
MT33-008	TOTAL -	All Accounts	\$2,480
MT33-009	TOTAL -	All Accounts	\$40,050
MT33-011	TOTAL -	All Accounts	\$29,410
MT33-012	TOTAL -	All Accounts	\$43,340
MT33-014	TOTAL -	All Accounts	\$16,200
MT33-018	TOTAL -	All Accounts	\$1,240
	<b>TOTAL – ALL DEVELOPMENTS</b>		<b>\$516,033</b>

**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)
<b>HA WIDE</b>	<b>6/2002</b>	<b>10/2002</b>
<b>MT33-001</b>	<b>6/2002</b>	<b>10/2002</b>
<b>MT33-002</b>	<b>6/2002</b>	<b>10/2002</b>
<b>MT33-003</b>	<b>6/2002</b>	<b>10/2002</b>
<b>MT33-008</b>	<b>6/2002</b>	<b>10/2002</b>
<b>MT33-009</b>	<b>6/2002</b>	<b>10/2002</b>
<b>MT33-011</b>	<b>6/2002</b>	<b>10/2002</b>
<b>MT33-012</b>	<b>6/2002</b>	<b>10/2002</b>
<b>MT33-014</b>	<b>6/2002</b>	<b>10/2002</b>
<b>MT33-018</b>	<b>6/2002</b>	<b>10/2002</b>

**(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 X No: Is the PHA providing an optional 5-Year Action Plan for the Capital Fund? (if no, skip to sub-component 7B)

b. If yes to question a, select one:

The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state name

-or-

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

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

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

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

1. Development name:

2. Development (project) number:

3. Status of grant: (select the statement that best describes the current status)

- Revitalization Plan under development
- Revitalization Plan submitted, pending approval
- Revitalization Plan approved
- Activities pursuant to an approved Revitalization Plan underway

Yes X No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?

If yes, list development name/s below:

Yes  No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?  
If yes, list developments or activities below:

Yes  No: e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?  
If yes, list developments or activities below:

## **8. Demolition and Disposition**

[24 CFR Part 903.7 9 (h)]

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

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

<b>Demolition/Disposition Activity Description</b>	
1a. Development name: No specific name – scattered sites	
1b. Development (project) number: MT06-001	
2. Activity type: Demolition <input type="checkbox"/>	
Disposition X	
3. Application status (select one)	
Approved <input type="checkbox"/>	
Submitted, pending approval X	
Planned application <input type="checkbox"/>	
4. Date application approved, <b>submitted</b> , or planned for submission: <u>(25/01/00)</u>	
5. Number of units affected: 3	
6. Coverage of action (select one)	
X Part of the development	
<input type="checkbox"/> Total development	
7. Timeline for activity:	
a. Actual or projected start date of activity: May 15, 2001	
b. Projected end date of activity: November 2001	

<b>Demolition/Disposition Activity Description</b>
1a. Development name: No specific name 1b. Development (project) number: MT06-008
2. Activity type: Demolition <input type="checkbox"/> Disposition X
3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval X Planned application <input type="checkbox"/>
4. Date application approved, <b>submitted</b> , or planned for submission: <u>(25/01/00)</u>
5. Number of units affected: 12 6. Coverage of action (select one) <input type="checkbox"/> Part of the development X Total development
7. Timeline for activity: a. Actual or projected start date of activity: May 15, 2001 b. Projected end date of activity: November 2001

<b>Demolition/Disposition Activity Description</b>
1a. Development name: No specific name – scattered site 1b. Development (project) number: MT06-011
2. Activity type: Demolition <input type="checkbox"/> Disposition X
3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval X Planned application <input type="checkbox"/>
4. Date application approved, <b>submitted</b> , or planned for submission: <u>(25/01/00)</u>
5. Number of units affected: 6 6. Coverage of action (select one) X Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: May 15, 2001 b. Projected end date of activity: November 2001

<b>Demolition/Disposition Activity Description</b>	
1a. Development name: No specific name – scattered site	
1b. Development (project) number: MT06-012	
2. Activity type: Demolition <input type="checkbox"/>	Disposition X
3. Application status (select one)	
Approved <input type="checkbox"/>	
Submitted, pending approval X	
Planned application <input type="checkbox"/>	
4. Date application approved, <b>submitted</b> , or planned for submission: <u>(25/01/00)</u>	
5. Number of units affected: 4	
6. Coverage of action (select one)	
X Part of the development	
<input type="checkbox"/> Total development	
7. Timeline for activity:	
a. Actual or projected start date of activity: May 15, 2001	
b. Projected end date of activity: November 2001	

<b>Demolition/Disposition Activity Description</b>	
1a. Development name: No specific name – scattered sites	
1b. Development (project) number: MT06-014	
2. Activity type: Demolition <input type="checkbox"/>	Disposition X
3. Application status (select one)	
Approved <input type="checkbox"/>	
Submitted, pending approval X	
Planned application <input type="checkbox"/>	
4. Date application approved, <b>submitted</b> , or planned for submission: <u>(25/01/00)</u>	
5. Number of units affected: 20	
6. Coverage of action (select one)	
X Part of the development	
<input type="checkbox"/> Total development	
7. Timeline for activity:	
a. Actual or projected start date of activity: May 15, 2001	
b. Projected end date of activity: November 2001	

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

2. Activity Description

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

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



6. Number of units affected:
7. Coverage of action (select one)
- 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.

<b>Conversion of Public Housing Activity Description</b>	
1a. Development name:	
1b. Development (project) number:	
2. What is the status of the required assessment?	
<input type="checkbox"/> Assessment underway <input type="checkbox"/> Assessment results submitted to HUD <input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question) <input type="checkbox"/> Other (explain below)	
3. <input type="checkbox"/> Yes <input type="checkbox"/> No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to block 5.)	
4. Status of Conversion Plan (select the statement that best describes the current status)	
<input type="checkbox"/> Conversion Plan in development <input type="checkbox"/> Conversion Plan submitted to HUD on: (DD/MM/YYYY) <input type="checkbox"/> Conversion Plan approved by HUD on: (DD/MM/YYYY) <input type="checkbox"/> Activities pursuant to HUD-approved Conversion Plan underway	

5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one)

- Units addressed in a pending or approved demolition application (date submitted or approved: \_\_\_\_\_)
- Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: \_\_\_\_\_)
- Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: \_\_\_\_\_)
- Requirements no longer applicable: vacancy rates are less than 10 percent
- Requirements no longer applicable: site now has less than 300 units
- Other: (describe below)

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

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

# 11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

## A. Public Housing

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

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

2. Activity Description

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

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

## B. Section 8 Tenant Based Assistance

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

### 2. Program Description:

#### 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: EXEMPT**

[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 entered into a cooperative agreement with the TANF Agency, to share information and/or target supportive services (as contemplated by section 12(d)(7) of the Housing Act of 1937)?

If yes, what was the date that agreement was signed? DD/MM/YY

#### 2. Other coordination efforts between the PHA and TANF agency (select all that apply)

- Client referrals
- Information sharing regarding mutual clients (for rent determinations and otherwise)
- Coordinate the provision of specific social and self-sufficiency services and programs to eligible families
- Jointly administer programs
- Partner to administer a HUD Welfare-to-Work voucher program
- Joint administration of other demonstration program
- Other (describe)

### **B. Services and programs offered to residents and participants**

#### **(1) General**

##### a. Self-Sufficiency Policies

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

- Public housing rent determination policies
- Public housing admissions policies
- 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)

**(2) Family Self Sufficiency program/s**

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2000 Estimate)	Actual Number of Participants (As of: DD/MM/YY)
Public Housing		
Section 8		

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: EXEMPT**

[24 CFR Part 903.7 9 (m)]

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

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

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

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

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

- Safety and security survey of residents
- Analysis of crime statistics over time for crimes committed "in and around" public housing authority
- Analysis of cost trends over time for repair of vandalism and removal of graffiti
- Resident reports
- PHA employee reports
- Police reports
- Demonstrable, quantifiable success with previous or ongoing anticrime/anti drug programs
- Other (describe below)

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

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

1. List the crime prevention activities the PHA has undertaken or plans to undertake: (select all that apply)

- Contracting with outside and/or resident organizations for the provision of crime- and/or drug-prevention activities
- Crime Prevention Through Environmental Design
- Activities targeted to at-risk youth, adults, or seniors
- Volunteer Resident Patrol/Block Watchers Program
- Other (describe below)

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

### C. Coordination between PHA and the police

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

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

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

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

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

- Yes  No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes  No: Has the PHA included the PHDEP Plan for FY 2000 in this PHA Plan?
- Yes  No: This PHDEP Plan is an Attachment. (Attachment Filename: \_\_\_\_)

**14. RESERVED FOR PET POLICY**

[24 CFR Part 903.7 9 (n)]

## **15. Civil Rights Certifications**

[24 CFR Part 903.7 9 (o)]

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

## **16. Fiscal Audit**

[24 CFR Part 903.7 9 (p)]

1. X Yes  No: Is the PHA required to have an audit conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h))?  
(If no, skip to component 17.)
2. X Yes  No: Was the most recent fiscal audit submitted to HUD?
3.  Yes X No: Were there any findings as the result of that audit?
4.  Yes  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: EXEMPT**

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

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

X Attached at Attachment (File name) mt033b01

Provided below:

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

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

The PHA changed portions of the PHA Plan in response to comments  
List changes below:

Other: (list below)

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

1.  Yes X 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 X 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: **City of Missoula, Montana**

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)

- X The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
- X The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- X The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- X Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
  - Expanding the supply of affordable housing, specifically for the elderly and people with disabilities

Other: (list below)

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

The City of Missoula has awarded \$200,000 in CDBG funds for the MHA to use in the development of 53-units of affordable housing (one- and two-bedroom apts) and new administrative offices.

**D. Other Information Required by HUD**



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

MISSOULA HOUSING AUTHORITY  
PLAN FOR DECONCENTRATION OF POVERTY AND INCOME MIXING

The Missoula Housing Authority's admission policy is designed to provide for deconcentration of poverty and income-mixing by bringing higher income tenants into lower income projects and lower income tenants into higher income projects.

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

Skipping of a family on the waiting list specifically to reach another family with a lower or higher income is not to be considered an adverse action to the family. Such skipping will be uniformly applied until deconcentration and income targeting goals are met.

The Missoula Housing Authority (MHA) will gather data and analyze at least biannually the tenant characteristics of its public housing stock, including information regarding tenant incomes, to assist in the housing authority's deconcentration efforts.

Deconcentration and Income-Mixing Goals

The MHA's goal is to have eligible families having higher incomes occupy dwelling units in projects predominantly occupied by eligible families having lower incomes, and eligible families having lower incomes occupy dwelling units in projects predominantly occupied by eligible families having higher incomes.

MHA's housing stock consists of 89 units of single, duplex, or triplex scattered site family housing, 38 units of elderly/disabled housing, and 83 units of multi-family housing on eight different sites.

All units of scattered site housing are located in census tracts where less than 30% of the families are below the poverty rate. These units are not addressed in this plan, as deconcentration of poverty and income-mixing are inherent to the nature and location of these units. The 38 units at Vantage Villa have been designated as elderly/disabled housing since inception and have retained that character, therefore these units are also excluded from the deconcentration plan.

MHA's deconcentration and income-mixing plan will apply to the following multi-family sites:

100/920/102 Pullman	16 units
712 Charlo	9 units
1237/1320 Butte & 730 N. 6th	11 units
805/811/936 Stoddard	9 units
1609/1613 Phillips	4 units
1201/1205/1209 Toole	11 units
931/933 S. 4th West	8 units
5-7/41-50 Russell Park	15 units

Admission policies related to the deconcentration efforts of the MHA do not impose specific quotas. Therefore, the MHA will not set specific quotas, but will strive to achieve deconcentration and income-mixing at the sites listed above.

### Project Designation Methodology

The MHA will review the annual resident income of all developments, and using the incomes of all families (excludes elderly/disabled units at Vantage Villa) as a baseline, determine the average income of all of its resident families.

The MHA will designate higher income developments those with average income above the aggregate average.

The MHA will designate lower income developments those with average income below the aggregate average.

The MHA will determine and compare tenant incomes at the listed multi-family project sites. Upon analyzing its findings the MHA will apply the policies, measures and incentives listed below to bring higher income families into lower income developments and lower income families into higher income developments.

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

When selecting applicant families and assigning transfers for a designated project the MHA will determine whether the selection of the family will contribute to the MHA's deconcentration goals.

The MHA will not select families for a particular project if the selection will have a negative effect on the MHA's deconcentration goals. However, if there are insufficient families on the waiting list, or transfer list, under no circumstances will a unit remain vacant longer than necessary.

### MHA Incentives for Higher Income Families

The MHA offers a local admissions preference with a weight of three (3) for working families in order to move higher income families to the top of the waiting list.

In addition to maintaining its public housing stock in a manner that is safe, clean, well landscaped and attractive, the MHA will offer the following incentive for higher income families moving into lower income projects. The MHA will not take any adverse action against any higher income family declining an offer by the PHA to move into a lower income project.

The MHA will allow occupancy standards of one child per bedroom for higher income families (above the aggregate average) to move into a lower income multi-family site.

MINUTES

INTERIM ADVISORY BOARD MEETING MAY: 10, 2000

SALE AND REPLACEMENT OF PUBLIC HOUSING UNITS

**IN ATTENDANCE**

Missoula Housing Authority: Ed Mayer, Sharon O'Hare, Camille Watson, Tom Chapman, Rose Murphy, Michael Anne Lepole, Gloria Fortier, Dave Gentry, Paula Garland, Robert Reinstadler

Invitees: Elizabeth M., Tracy M., Louise Norwood, Richard E., Maren C., Christine G., Patrick Thomas M., Tola D.

The meeting commenced at 1:00 p.m.

Ed Mayer: Introduction: You are the people who receive rental assistance or other kinds of assistance from us, and so the reason we're even here at all is because of you. We're here to help you. The exciting part here for us is that we have been asked by Congress--in fact, told by Congress--and, therefore, the Department of Housing and Urban Development, that we need to get your feedback on how we operate our programs, where we're going, and what we're doing for this community. The Missoula Housing Authority's mission is to provide as much housing help to this community as we can. And that housing help comes in all kinds of different shapes, forms and flavors, because we have all kinds of people who need housing help.

Just so you know what a Housing Authority is, a Housing Authority is kind of a weird corporation. You probably all know that most businesses that operate in town, operate as either a partnership or as a sole owner or as a corporation.

The Housing Authority is a corporation, but we're a very different kind of corporation than most corporations. We have no profit motive at all. We don't make money. None of us can make profits who work here. In fact, you will get to know each other and there are a bunch of Housing Authority staff sitting here, who are as interested in the subject as I hope you will be. The Housing Authority is a corporation and we're set up under State law. The State of Montana set up a law that basically said we want to create a kind of vehicle, a kind of car, that can drive and provide certain kinds of housing assistance to a community and it's called a housing authority. So our corporate structure and our corporation is really kind of a creation of state law. And not only that, in order to establish a housing authority in Missoula back in 1978, the voters of Missoula had to pass a referendum saying we think there's a housing problem and we want to create a housing authority. So the Housing Authority was created by the public in 1978, and we've been operating ever since, and we've been growing and we've been providing housing programs to people like yourself.

Most of the programs we operate are funded or paid for by the Federal Government, so that the same Congress and the same Department of Housing and Urban Development that tells us we have to communicate with you and get your feedback, and share this information with, are the same folks that provide

most of the money that allows us to provide rental assistance, or houses that cost less than what you would normally rent them for out in the private market. We're a creature of the local electorate here. The voters said we want to create a Housing Authority. Because we're a public company, we are governed by what is called a Board of Governors, and we call them the Board of Commissioners, and they hold a public meeting every month that is open to the public and they basically decide what we're going to do and how we're going to do it. They're responsible for the Housing Authority. They are volunteers. They don't get paid. They have no interest other than their good heart in seeing the Housing Authority be a good, effective agency.

We would like to think at the Housing Authority that with your help we can design a car that is going to be the best possible car to drive in Missoula to provide the help for people who need help with their housing. As you all know, wages in Missoula are low and housing costs are high. How to answer that problem? We like to think that we are one of the agencies that can provide a lot of help. Right now, just so you know, we operate three main programs, and of those three main programs, we serve about 900 families in Missoula. About 900 families are helped with their rent. Some of those families are families. Some of those are people that live together. Some of those are just individuals. One of our programs is really designed to help homeless people get off the street, and these are homeless people with disabilities. That program is called Shelter Plus Care. We'll get into more detail later. One of the programs is called Section 8 and that provides rent supplement payments or rent payments. We help people pay the rent when they are renting from private landlords. One of the programs we operate is Public Housing, and that is where we actually own the houses and we rent them to families at 30% of their income, regardless of their income. Those are the main things that we do.

We also develop property and work with other agencies on home ownership. We also try to coordinate supportive services so that people that need help, if they find themselves in trouble, we can get them the help that they need before their family life blows up and they lose their home, things like that. So we are involved in a lot of ways around the issue of housing.

Your role as a participant on the advisory board is to give us some feedback on how we do our business and what we're doing. The really interesting thing is, we're going to be sharing with you over the next few weeks a lot of information. Basically, what we're doing for you is, we're going to open the hood of the car and you're going to get to look at the engine and see how the car works. All the information we're going to share with you is public information. All of it would be available to you if you were to walk in the door and said, "Ed, I want to know how the Public Housing program works," I would hand you a copy of our Administrative Plan. If you were to ask, "Where is the Housing Authority going in the next 5 years?" I would give you a copy of our Strategic Plan. What is interesting about this group and what is so special about your opportunity, you get to look at all the guts of the Housing Authority. You get to see the big picture of who we really are, and we're really interested in hearing from you. Are we conducting our business well? Are we conducting it respectfully? Are we taking advantage of all the possibilities that are out there? But before you can give us any good feedback, we have to educate you about what we are. We have to teach you about how the car works and what's under the hood, how the wiring works, who does what. So over the next few weeks we're going to have different staff

members, who run different programs, explain to you their program.

Sharon, today, is going to be working on a review of our strategic planning. Every year our Board gets together and says, given the resources and environment we work in, how are we going to make the best of this car that we have to drive down the road. That's my introduction to you of what you're here for. I hope you find it interesting and exciting. I also want you to know that we appreciate the fact that you are willing to give us your time. We recognize that you're here on a voluntary basis. We really are not allowed to pay you. But what we attempt to do is recognize your services. Every time you show up we're going to give you a gift certificate at Albertson's, so there is something there that makes it a little less painful to come here and spend your time with us. And we really appreciate your interest. I'm very excited by this opportunity to get to know some of you better. I will be here at times, and other times not, but like I say, Sharon O'Hare will be the main facilitator. She is going to be the circus master here, taking you on a tour of the lion cages, the elephant cages, and showing you how the circus works. Sharon is our Special Projects Manager here at the Housing Authority. She handles things like special development projects in an effort to get more bricks and mortar. Other folks here work on things like rental assistance and, of course, I take the responsibility for the Staff and I answer to the Board of Commissioners.

Does anyone have any questions about what I've laid out and your responsibility here? Again, we're looking for your good thinking, your constructive thoughts. You may hear everything we have to say and say "You guys are doing okay. We have no thoughts." You may say, "You know, we like what you had to say here, but over here this is bad." Our Board of Commissioners really want to hear from you. The end result is--we are putting together an agency plan, a comprehensive plan, and in that plan it's not just strategically where we're going and how we are serving the community, but includes an administrative plan, how we operate each program, how we treat people, how we assist them, how we communicate, how we respond; how we outreach to families, how we don't discriminate. It's against the law for us to discriminate on a variety of levels. You get to have a say here. And if nothing else, I hope you find it a very interesting education, because I will tell you based on my experience in the world, the Housing Authority is a very interesting place. We're a particular kind of business. We are a service business, and we aim to please. And obviously, we don't have unlimited resources, and we have to be very creative about how we get the most mileage for our dollar, and you're here to help us do that, I hope.

Does anyone have any questions? If you don't, I'm going to turn this meeting over to Sharon. Again, I want to thank you very much for your willingness to do this, and if you have any comments throughout this process, I want to remind you that our Board of Commissioners has a public meeting every third Tuesday of the month, and it's open to the public. We have an agenda item for public and tenant comment all the time, so if you have comments you want to make outside of this group, you're always welcome to do that there. Other than that, within this group it would be helpful if you had comments. Don't hesitate to raise your hands and say, "Wait a minute, stop. I don't understand that." We're going to be going over things that may be difficult to understand the first time around. The long and short of it, what we really do is not difficult to understand, and that is, we try to help households get the help they need.

Elizabeth M.: I have one quick question. Why is this an interim board? Sort of a prototype?

Sharon O'Hare: The reason it's an interim board is that when Congress passed this new law, they said that Housing Authorities need to have a--they called it a resident advisory board--and they said it needs to be elected. But the first year under the new law, the Housing Authority is allowed to appoint, and that's the reason it's interim. It's short term. We're not asking you to serve--of course, it would be terrific if you wanted to continue this board here--we're asking for a couple of weeks of your time. With that, speaking of time, is there anyone that needs to be our of here at 1:30? If we went to 1:30 would that be a problem for anybody?

Tola D.: Yes. I have to leave at 1:20.

Ed Mayer: And if you'll excuse me, I have another meeting I have to run to, but I look forward to visiting with you in the future.

Sharon O'Hare: As we pass the packets around to you, if you're Staff, we ask you pass your certificates for Albertson's back in. You're already being paid for you being here.

(Introductions)

Elizabeth M.: I feel very lucky to be a Public Housing single mom.

Tracy M.: I am in Public Housing.

Louise N.: I'm a resident.

Richard E.: I'm under Shelter Plus.

Tola D.: I have a Section 8 voucher and I work for Opportunity Resources, and a lot of people that have rental assistance are in different programs, and my boss allowed me to come here.

Michael Anne Lepole: I wear a variety of hats. I run the Shelter Plus Care program, I help with the Section 8 voucher program, and also I do secretarial work.

Sharon O'Hare: Paula is responsible for your wonderful packets, by the way.

Paula Garland: I'm the receptionist.

Robert Reinstadler: I'm intern for special housing needs.

Gloria Fortier: I'm now full time with the Staff and work with the Public Housing.

Maren C.: I'm a Section 8 participant and have been for quite a while.

Rose Murphy: I work with the Section 8 program.

Jodie: I'm a Section 8 participant also.



Christine J.: I have a Section 8 voucher.

Dave Gentry: I'm the Social Service Coordinator here.

Camille Watson: I'm the manager of the Public Housing Program.

Tom Chapman: I've worked with housing for five plus years. I started in maintenance and have been in maintenance for five years, and I recently came on as Property Management Assistant.

Sharon O'Hare: We have already welcomed you to the meeting and you've introduced yourselves. Does anyone have any more questions about why at this point we've asked you to participate as an advisory board?

Camille Watson: This is an interim board, by what date do we have to have a permanent advisory board?

Sharon O'Hare: By the time we send in our next annual plan, which will be next year. A year from now there needs to be in place, for all of the programs, an advisory board that represents all we serve.

Camille Watson: Public Housing residents are in desperate need of having a Public Housing representative sit on our Board of Commissioners. There is quite a bit of work involved. You have to collect signatures from Public Housing residents.

Sharon O'Hare: If there aren't any more questions, I'm not going to repeat what Ed said because I hate boring meetings, and I was concerned when putting this one together that we're doing a lot of talking initially. What we really want is to hear your responses. However, there is certain groundwork we need to lay this in first meeting, in terms of going over five years of planning and what we think is the main things about the Housing Authority, some of the basic principles, and where we're coming from. After that, and even during that, I would like to see an exchange of dialogue. The Housing Authority, the first thing to do is to talk about what is the framework. Ed did a little bit by telling you how we operate as a corporation. There are some of things over here that I am going to draw your attention to. If you go to the Strategic Plan and you look at some of the goals associated with the Strategic Plan--and these are all things that the Board of Commissioners has instructed us to carry forward with--you will find what we call guiding principles. What is it that we're doing? For example, there's a whole range of Housing Authorities in the United States. There are some Housing Authorities that only operate a Section 8 program. They don't own any property. They don't own any buildings. All they do is administer the Section 8 vouchers. There are other Housing Authorities that are exactly the opposite. So really, the guiding principles kind of tell us and the general public what it is that the Missoula Housing Authority is about.

(Referring to "Guiding Principles" document hand-out)

There are three categories of what we do. One is, we are a Housing Authority that owns Public Housing. We have at the current time 210 units of Public Housing that we own. About 80 of these are single family houses, and we will be talking about that a little bit later. But in essence, the Board has said for this next five years, that we're going to expanding the assets, meaning that because we own almost eight million dollars worth of property, that we

can build and use that to provide more housing assistance. We've got a lot of property up there and we need to keep that as our base.

There are development activities, new programs directed towards the creation of rental property. For example, there are some Housing Authorities that are quite active in developing property for home ownership. The Board has decided, at least for the time being, that there are a lot of other home ownership promotion agencies here in town, that this Housing Authority should try to meet the rental housing need - to create rental housing for low and moderate income folks. The rental housing will primarily serve the elderly, disabled and smaller households. We want to take a look at developing some property so we have mixed income levels, so you get some diversity of households that are living together, particularly in the multifamily situation. We've got rental housing design standards. Sort of goals to keep in mind as we go about creating the rental properties. One is that, we don't want to create a new rental property where we have 80 units all in one location. This doesn't seem to fit Missoula's profile. We want to have a target size between 4 to 12 units if we're looking at multifamily housing on a site. So as we go out, and Ed and I are looking at various pieces of land to buy for the next housing development that we want to do, we look at parcels that are large enough to allow between 4 and 12 units, maybe a little bit more, maybe up to 18, but not a whole lot more than that. If we're talking about housing for elderly or special needs, we look to go with a larger property. Vantage Villa has 38 units here, and I think it's very successful and works well. But if you had 38 families here, it would be a little problematic because of the parking needs, no playground. Family means two or more bedrooms, and elderly one.

We want to make sure that the developments that we do is located close to services, necessary services such as transportation, grocery stores, schools, that type of thing. This direction kind of limits us in terms of property in Missoula. It's very difficult to find properly zoned land that is vacant that's not costing an arm and leg to buy. We don't want to do any new housing development in industrial. We want to design it for efficient management and maintenance. The last 15 minutes, I'm going to show you some slides of the type of housing that we're talking about developing in the next five years, that some of the other Housing Authorities have done. I have a board with photographs in my office that Paula is going to bring out, and I'll also show you an award winning housing development that we did here in town, that happened to be for home ownership. It's really pretty neat. We won national awards for 1421 Eaton Street.

We also have a role as an affordable housing advocate. We need to be the spokesperson for fair housing and affordable housing in this community. We have a responsibility that our Board feels very strongly that we need not only to actively market our programs to the community, in other words what people need services and we're here to help, but also to go speak to the City Council and other groups about the needs of low income, and about land use and policy regulations.

We want to help other agencies in town in their efforts of affordable housing.

There are agencies that work in the home ownership arena, and we cooperate a lot with them. We also want to be the local expert on housing policy and affordable housing development by having a lot of information that other people might use in grant funding and documents. We want to be the source for

that, and we are.

Finally, there is customer service. This is how we at the Housing Authority deal with you, our customers, and our clients. This is our philosophy. It primarily focuses on the needs of low and moderate income people that are residents of Public Housing, or participants in Shelter Plus Care or the Section 8 program. There are two kinds of customers that we serve, and we need to keep that in mind when we're gearing our services toward them.

One kind of customer is someone who is elderly or disabled, on a fixed income, and who we anticipate will be either a Section 8 participant or living in Public Housing for a very long time. The other type of customers are those low income households that may be able to increase their incomes over time and move through and beyond the need for further help. We have two groups that we're serving, and some of our services are tailored towards one and some tailored for the others. We are coordinating community based services to all of our customers, whether they are Public Housing residents or Section 8 participants. Our social service program units, again, are tailored to two types of customers that we have. The Welfare to Work model will be the basis of our social service program for low income households that can increase their earnings. Even though the Family Self-Sufficiency program is being phased out by the Federal Government, the Board strongly feels that we should do whatever we can to step in and continue that whole idea of the family self-sufficiency program.

That is just a snapshot of our guiding principles.

Are there any comments or any thoughts about this.

Maren C.: When you're talking about the mixed income levels, are you talking about--I understand it that the Housing Authority as it develops more lots, intends to rent them at fair market rent and some would have a subsidized rate.

Sharon O'Hare: Exactly.

Maren C.: What does Welfare to Work mean?

Sharon O'Hare: The Welfare to Work is the basis for designing social services programs for low income households with the potential for increased earnings.

Maren C.: I was wondering basically how you locate participants that would be eligible to be put into that program, and how that would be developed. Will there be exceptions to that? There are a lot of problems with the Welfare to Work program.

Rose Murphy: We have now what are called Welfare to Work vouchers, and these are designed to help them -- they receive that in the last two years, or those who were eligible to receive it in the two years, are receiving it now.

Along with that Welfare to Work voucher, the ultimate goal for that program is to help a person from subsidized housing to self-sufficiency and home ownership.

Tola D.: Is it tied to family self-sufficiency?

Dave Gentry: No. I think the primary goal is to create self-sufficiency, but that's along--

Rose Murphy: Along with our Welfare to Work vouchers, we won't get any more FSS slots. Those slots are going to be available only to the ones that are eligible--they have to be able to be self-sufficient and be in a situation where they're off all public assistance.

Tola D.: Everything but rental assistance.

Dave Gentry: About three-quarters of my graduates live in town right now.

Sharon O'Hare: Dave, you say about three-quarters of your graduates--

Dave Gentry: Take the money from the escrow that they generate to buy a home.

Sharon O'Hare: Dave, could you briefly give an explanation?

Dave Gentry: Family self-sufficiency is a program that is five years in length where a participant sets out a set of goals of how they want to become self-sufficient in that five years, whether it's education, job training, getting a job. There are also usually other things like credit, personal counseling, things like that. To become self-sufficient and off any public assistance, anything that comes from the State, SSI, CI. The incentive is as you pay more rent --

Sharon O'Hare: And you pay more rent because your income is increasing. Right?

Dave Gentry: As you pay more rent you pay 30% of their income, that formula comes out that you will have payment from HUD escrow into an escrow account that when you graduate from the program you get the money. I had someone graduate two weeks ago with \$10,600. However, under QHWRA, Quality Housing Work Responsibility Act of 1998, they eliminated FSS as of 2001. And in that sense they want all families to be self-sufficient. And in the next phase they want all families to be self-sufficient. As people graduate off my program, I do not replace those in my program.

Sharon O'Hare: So back to the guiding principles over here, this is why the Board came up with this one. It said the Housing Authority shall investigate development of its own FSS type program activity. We don't have the subsidy from HUD any more that encourages people to increase their income and end up with a \$10,000 amount to take it and use it as a down payment.

Dave Gentry: Anybody who signed a contract, we have to keep them. As people drop off I will replace them. As they graduate, I don't have to. We are down to about 48 in Section 8.

Tola D.: What does dropping off mean?

Dave Gentry: Somebody that quits.

Maren C.: So you are trying to develop a similar program without any HUD funding.

Sharon O'Hare: This kind of links back to what you were saying about it, one of the ways we might be able to do that is that, while we will always be a nonprofit, we're also doing things that are entrepreneurial. We're going to go out there, and what we would like to do is develop some mixed income housing. This will not be Public Housing. With this affordable mixed income housing, if we had some apartments or townhouses that are renting at fair market rent, some that are renting by use of a Section 8 subsidy, we might be able to generate the kind of cash flow from that that enables to support programs like the Family Self-Sufficiency, and that's the whole goal behind moving into this more entrepreneurial role. FSS is a perfect example of what's happening at the Federal level with HUD funding. It's going away. It is disappearing. And that's also another reason why we're in much better shape as a Housing Authority - because we have these eight million dollars worth of physical assets to operate off of.

(Discussion of Proposed Sale and Replacement of Public Housing)

How many of you have heard just a little bit about the houses that we're proposing to sell, 45 of our Public Housing units?

At this point right now I'll move into our Strategic Plan and we need to talk about this. I might go ahead and show you the slides early. But is there anybody who hasn't heard of what it is we're trying to do? Briefly, we have 80 single family Public Housing units. This is strictly the Public Housing program I'm talking about. There are a number of these homes that are very expensive to maintain. They have big lots, they have decks. Tom was in the maintenance department and he can testify to the inefficiency of some of these single family homes on big lots. The Housing Authority just hasn't had the staff or funds to keep the maintenance up. We don't get enough money from HUD and with a diminishing pool of resources to even keep re-roofing the houses. So we have a problem. We have a resource that is losing its value because we can't maintain it. About three years ago, the Board of Commissioners, with Staff's recommendation, decided to start looking at the idea of selling off the bigger, more inefficient and larger Public Housing units. One reason being they're expensive and inefficient to maintain, but also for the reason--and I'll come over here and start talking about this now--the yellow sheet shows the other reason why the Housing Authority is proposing to sell and replace 45 units of Public Housing.

What has happened in Missoula over the last ten years is that the average household size has changed. The demand for three and four bedroom units is declining. Over the last ten years they are fewer applicants coming in for the 4 to 5 bedroom units, and there are more applicants coming in who want two bedroom units. In general, we have more people coming in to Missoula and the population has increased. There is a community crisis in the availability of affordable housing. We have a huge gap growing between what the average person can afford and the housing costs in Missoula. We've had all this change taking place in ten years, with the family size becoming smaller and more people moving here. What has happened is, our inventory of public housing hasn't changed. We have virtually the same units out there that we had ten years ago. By looking at the first column there on that first yellow sheet, it talks about the number of families waiting for Public Housing. For one and two bedroom housing, 288 families are waiting, as opposed to the 32 families waiting for a three, four or five bedroom unit. What we see is a real unfairness, a lack of equality, in terms of the length of time you have to wait for Public Housing. If I come in as an applicant with my husband and

I have five children, and I need a five bedroom house or a four bedroom house, I may not have to wait at all or wait a very short period of time. But if I'm a single mom with one child and I need a two bedroom unit, I will have to wait a couple of years. And that on the face of it seems very unfair. All of our applicants should have to spend the same amount of time in line for housing. Everybody needs to wait because unfortunately we don't have the resources to have housing immediately available, but it just doesn't seem fair. So that's the second big reason behind the big project the Housing Authority has undertaken in terms of proposing to sell the 45 Public Housing units.

Camille Watson: And to bring in another thing in line with 3 and 4 bedrooms, we are scored by HUD on our vacancy rate. And we have to advise them that we have to advertise for 3 and 4 bedroom families, trying to get families in order to rent. The longer it sits there, the more it affects our overall score for the year. We don't want affordable housing sitting there empty and yet we can't get enough 3 and 4 bedroom families to even rent them.

Richard E.: These numbers here on the 3 bedroom with 35 families waiting.

Camille Watson: What is a little different about the Public Housing program, there are more requirements than the Section 8 program for admission. For instance, if you're going to rent in Public Housing, a requirement is that you have three good past rental references. A lot of 3 bedroom families do not. Poor credit, poor record of being terminated or evicted from a Public Housing program in some other state. So, yes, we may have 23 people on the 3 bedroom waiting list. If I went through all 23 names, maybe five people would be qualified to rent. And you're also caught in that process too of waiting for the paperwork to come back, the rental references.

Elizabeth M.: I was wondering, Camille, is it because of the change involved in where the population is? When we were blessed with an instant vacancy, when we were evicted, my children and I, in 1994 or 1995, we had a four member family, two boys and we were in a 3 bedroom home, and then last year when the duplex on the other side of us in our building opened up, that there's a family that could be in like a three bedroom house and they have a four bedroom. And my kids are like, they each have their own room. I said I think it's because they can't find a big family for that.

Camille Watson: That's exactly why. And also there is another HUD requirement that says that now we have to do income mix properties. If I have eight units at one site, I can't have everyone who lives there be at the low income level. And a lot of times in order to meet those requirements, we have to use the oversized unit.

Elizabeth M.: So the income may supersede the appropriate person to bedroom ratio?

Camille Watson: You'll find that maybe you'll have 10 to 13 people who are on our transfer list right now, moving to another house. But our philosophy is, unless it's an emergency, we're not going to transfer someone with kids in the school year. It does happen in the summer generally. HUD gives us so many regulations to go by that it's not as simple as that.

Sharon O'Hare: Let me show some of the houses that we're considering selling. (Slide show presentation.) All of the homes are listed on the back of the

hand-out sheet. If you need to get closer or farther away from the wall, scoot your chairs and move around.

What I want to draw your attention to is a couple of things on that last page for the houses that are proposed for sale. For the most part, 38 of them are single family homes. We do have a couple of older multifamily that we're looking at selling as well because the construction quality is dismal, or they're downtown and there's no place for the children to play and no parking and is just not a good location. So we want to go ahead and sell those. We also have five homes in Lolo. Because of the time it takes to go to Lolo and back, something else isn't getting done at the Missoula sites.

Patrick M.: So you're using the money from the properties to build more efficient housing or buy more efficient housing?

Sharon O'Hare: That's a good question. If you look at this list, we had to have all of the houses appraised as part of a very stringent application requirement. As you can imagine, HUD has many application requirements to get permission to sell these Public Housing units. We've been going through that for about six months with public meetings. Part of the application requirement is having a resident advisory board listed and give us some feedback on what we will be doing. What we will do with the sale of the houses is, which would be six million dollars gross, first we will replace all 45 Public Housing units with 45 other Public Housing units. Probably with three sites of 15 units each of townhouses or apartments or something like that. But we will still have 45 units of Public Housing. There will probably be a two or three year lag, depending on how well I do my job in getting these built again. But we will continue to have that many numbers of Public Housing.

Tola D.: There will be 45 or more.

Sharon O'Hare: There will be 45 and no more than 45 Public Housing units, the reason being HUD will never increase the number of Public Housing units that we're allowed to operate.

Camille Watson: We could build more but they won't fund them.

Sharon O'Hare: So what we're going to do is, we're going to replace those 45 Public Housing units and get that subsidy from HUD. But then, because we're building multifamily, we're building more efficiently and we're not using as much ground, we're not single family, we expect to be able to build another 40 units of housing, not Public Housing, but it will be affordable housing. I mean, you could take a Section 8 voucher and instead of going to a private landlord, you're going to us. And we operate affordable housing using Section 8 vouchers or other types of programs. So we expect another 40 units of affordable housing in addition to the 45 that we're going to replace.

Maren C.: Will the 40 units be mixed income units?

Sharon O'Hare: Could be. But 40 units will be affordable. We may do a 30% market rate, 30% moderate and 40% low income.

Maren C.: But it will still be affordable housing.

Sharon O'Hare: Affordable housing is defined as housing that you only need to pay 30% of your income for rent and utilities. So that's the standard we use for what we do.

Tom Chapman: How about the bedroom count?

Sharon O'Hare: Because of the changing profile of Missoula, families are getting smaller. There is some theory that the larger family couldn't make it in Missoula and they've moved away. We will be building one and two bedroom units. We're not going to sell all the three and four bedroom Public Housing units and turn around and build three and four bedroom more efficient Public Housing units because, while they would be more efficient, it still wouldn't address the fairness issue we talked about earlier. It still would not be fair to those people who are waiting for years for one and two bedroom houses.

So our development program is to build one and two bedroom units and take care of those folks who have been waiting a really long time for Public Housing.

Maren C.: But there will be units with three and four bedrooms.

Sharon O'Hare: Yes, look at the final list. It's the next-to-the-last column on the right. We will still have 61 units of three bedroom housing, and 12 units of four and five bedroom housing. So we're not getting rid of all our three and four bedroom units.

Maren C.: -- it seems to me a more efficient way to serve the people. Is that your plan to have the three and four bedroom and go to the voucher program.

Sharon O'Hare: Yes.

Maren C.: Rather than offering the Public Housing.

Sharon O'Hare: We still have a lot of three and four bedrooms. Our goal is to have our housing inventory fairly represent our customers needs.

(Begin showing slides)

I'm just going to quickly go through here. Here's an example of a deck that we're responsible to maintain. This is in Lolo. For those of you who aren't familiar with the Public Housing program, the resident is responsible for maintaining the lawn. This is Lolo as well. This is one up on the South Hills.

Tom Chapman: A lot of these have double car garages. Unfinished basements. And a lot of them they can't use for bedrooms because they don't have the egress windows. There's just a lot of problems.

Gloria Fortier: Will we sell this South Hills property with the driveways?.

Tom Chapman: The big problem with houses as opposed to apartments, in houses there is no standardization of parts, whereas in an apartment you standardize everything so you can stock everything, and easy to go to the shop and pick up what you need for repair. In a house, you end up having to go to a store and try to find some old thing that isn't made any more. It becomes really hard to keep these places fixed up as opposed to standardization.



Sharon O'Hare: We are required to either sell at public auction on the courthouse steps, or go through MLS. We will make them all equally available to anybody who wants to buy one.

Tola D.: And are you going sell for what they'll be listed at?

Sharon O'Hare: The appraised value will be the price they're listed at. It takes the Secretary of HUD to sign off if we sell it for less than the listed price.

Tola D.: Aren't you going to end up paying a realtor commission?

Sharon O'Hare: Yes, but we're also going to put out a request for proposals from realtors saying--and there may be not just one out there, there may be three--and we're going to look at negotiating the best deal for the Housing Authority. We've done a lot of the work already. A question as we're going through here that might come to mind is, how come the Housing Authority ended up owning all of these single family homes?

Back in the '80's, late 70's or early 80's, when the Housing Authority was looking at increasing the amount of Public Housing, HUD had a requirement that if you could buy it cheaper than you could build it, you had to buy it. So if you could buy this home cheaper than you could build a one unit of multifamily townhouse development, you were forced to buy it. Back in the late 70's, early 80's, you might remember that the real estate market in Missoula was abysmal, so there were a lot of houses on the market at that time.

This is an example of a very difficult to maintain property. The resident's responsibility to maintain the grass.

Patrick : Who actually has title to the existing homes?

Sharon O'Hare: The Missoula Housing Authority has title.

Patrick : Is that through the State of Montana then? Or the City of Missoula?

Camille Watson: We're our own company and we own them.

Patrick : But HUD in this case was the --

Sharon O'Hare: There is a deed restriction on the ownership documents that say that we need to operate this as Public Housing.

Maren C.: I think that was required as a corporation structure and HUD--the Federal Government made the funds available with the restriction. Everything is restricted.

Sharon O'Hare: Even though we hold title to this home--this is an example of a property with the driveway that needs to be redone, a roof that needs to be redone. Gutters need to be redone. We hold title, but in order to sell it we have to go through this process. There's a deck to take care of.

Patrick : Will they be matching these funds?

Sharon O'Hare: No.

Tom Chapman: This one has a huge basement, two car garage. There's no bedroom in the basement. This large recreation room down there.

Sharon O'Hare: And we may have purchased that one for \$48,000 back in the late 70's. It is appraised for \$130,000 now. We can take the money from the sale of that house and build two multifamily units. The Board really feels, and Staff as well, that this is the right thing to do, and have thought that for a long time.

Sharon O'Hare: This is another one that needs the driveway and roofing done. The deck has a hot tub?

Tom Chapman: It's just a sun shade.

Sharon O'Hare: This is Lolo. When we did an analysis of all of our single family homes, these are the ones that are most inefficient for a variety of reasons. The distance to Lolo, or the decks, or they have these basements without egress windows or there's a huge lot.  
(End of slides of houses proposed for sale).

(Slides of new multi-family developments).

I will also tell you we wouldn't do anything this big. There are probably 80 units there. But this is the kind of thing you can do when we're talking about multifamily. When we talk about the future of the Housing Authority and multifamily development, what I want you to do is get excited at seeing this.

This is what we can do. These are all attached houses where it's fairly dense. In other words, you're getting a lot of families per acre on there - and that usually is the test of affordability. Our land cost is very high in Missoula. Look at the courtyards. These are very modest construction. These are all affordable housing developments. This isn't market rate stuff. This is stuff that we can build here, and in fact, we have. Take a look at the Eaton Street project. We can do this here in Missoula, and I'm really excited that this is the direction we're heading.

Tola D.: What if the houses don't sell?

Sharon O'Hare: They'll sell. We've been told by any number of realtors that there is a lack of housing for sale in that price range. Some of them will be fixer uppers, but for a lot of people, that's what they want.

Camille Watson: As long as they're sanitary and safe.

Maren C.: Were they appraised as is?

Sharon O'Hare: Yes, they were appraised as is. This is another example of compact housing. This is a more urban model but we could do this with infill, but it has these colored, different treatments at the street so they're kind of row houses. These are affordable. This is similar to a project that we have under design right now for Russell Square. This is not Public Housing, it's not using any of the money from the sale of these houses. We're going to be putting our new offices there. I love those little porches on the top. You walk out and you've got a porch and you've also got a little entrance down

below. I think this is senior housing with a nice community room. Here's another one quite similar to that. We don't want to build boxes, and we definitely don't want to build tomorrow's ghettos today. The idea is for a good design, spending a little bit more money on the design and end up with something that is a lot more liveable. This is really what the Board strongly endorsed as a vision of our future. This is why they have undertaken this very, very difficult task of the sale of 45 units of Public Housing. It's quite traumatic for a lot of people involved. I'm referring to our clients.

Let me say one more thing when we ask for your feedback. When the schedule was set up I didn't realize I was going to be out of town next Wednesday, so we're not going to have a meeting. But I think what we'll do is take a two week break and come back on Wednesday, May 24th, and talk about specific Public Housing policy, management plan, and Section 8 admin plan. In terms of going for four meetings instead of three, let's see where we are at the end of next week and see how we feel about whether we need to schedule another one. We absolutely have to have this part of your review of our five year plan and our one year plan completed by June 14th, so that's the deadline we're operating under. Let's be flexible and I'm going to honor your time and make sure we don't have more than we have to. We want your feedback, is this making sense, is it clear?

Camille Watson: I hope you guys feel comfortable with the Staff comment. This is very important for us. I want you to give feedback, and I don't want you to just listen to me and take what I say for granted. Ask us questions. We want your feedback.

Sharon O'Hare: And the questions that you've raised have been really helpful. We don't want to be pointy-headed bureaucrats and we're really trying not to be. So if we get going on that, we need to be stopped. We need to explain what it is we're talking about. I would love written comments or ideas or more questions. There are some notes in there and if you want to give your comments in writing, that would be very helpful as well.

Richard E.: I just wanted to ask you when you were showing the pictures, it reminded me of row houses like in Boston. In these back yards, are they going to be located into a park? After all, we're talking about families and located in certain areas.

Camille Watson: That definitely is considered. It is crucial that everyone have some sort of privacy, whether it's a patio and a very small back yard and open common areas for the kids. There was a comment I wanted to make about the sale and replacement of homes. I don't want to take someone off the waiting list and impose Public Housing on them and set them up for failure. You take someone off the waiting list, you've got a single parent with three or four kids, and they are working, or they are working and going to school parttime. It is a ton of work to mow one of these lawns up on South Hills or Lolo. Trim the trees and bushes. Keep the water on. That's a lot of work. And I feel we're setting these families up for failure because it's a lease violation if they don't mow the lawn, it's a lease violation if you don't take the trash out. You don't get any training, if you don't keep the house clean. Don't shovel your snow. It's just not working, and it's not working for us as Staff either to trapped. Did they shovel their snow. There's a liability insurance we have but if the resident does not shovel the snow and somebody falls down, it's the Housing Authority. So we're kind of stuck, I think, in

the current situation with a very strict lease. We're setting up these families to fail in the big homes, but even the two parent households would have a hard time keeping it looking nice and it costs a lot of money. You could have low income and end up in a three bedroom home at South Hills. You could also be the next person on the waiting list, you could have a two person household working, and end up in an apartment complex on the North Side. So we have to go first qualified, first served, maybe it's not an apartment but it's a house. These over-sized homes are just too much.

Richard E.: I can understand that, but I guess coming into Shelter Plus, the client has to have some responsibility.

Camille Watson: The client has to take responsibility, but what I'm saying-- not all my families, but where some of my families are coming from, maybe the house burned down, whatever happened, psychologically I'm not sure they're ready to tackle a four bedroom home with a big lawn and you have all these expectations. I don't feel that just general day to day upkeep should be that taxing.

Sharon O'Hare: And let's talk about that when we were talking about the admin plan, the Public Housing program, the Section 8 and also the Commission's present system. When everybody has gone through this, it's going to be really helpful to us to hear what you thought about it and ways that we can make it better.

Gloria Fortier: I think the nice part will be having someone else's unbiased opinion, but the system works, and how that subsidy helps them. I would like to have opposing opinions and they would be more unbiased.

Sharon O'Hare: Keep your packets. I encourage you to read through the Strategic Plan and we'll be talking more about that. And thank you again coming. We really appreciate it.

The meeting ended at 2:28 p.m.

MINUTES

SALE AND DISPOSITION OF PUBLIC HOUSING UNITS

INTERIM BOARD MEETING

MAY 24, 2000

**IN ATTENDANCE**

Missoula Housing Authority: Sharon O'Hare, Camille Watson, Tom Chapman, Rose  
Murphy, Michael Anne Lepole, Gloria Fortier,  
Dave Gentry, Paula Garland, Stacy Otto, Lori Davidson

Invitees: Maren C., Robert S., Christine G.,  
Louise N., Tola D., Richard E., Elizabeth  
M., Jodie U., Don H.

The meeting commenced at 1:06 p.m.

Sharon O'Hare: After the introductions, we'll discuss what we will do.

Introductions were then made.

Sharon O'Hare: We have an agenda here for everyone. I'll go over what we're going to do. At our first meeting, we essentially went over our five year plan for the Housing Authority. We also talked about the sale and replacement plan. Are there any lingering comments or questions from two weeks ago.

Elizabeth M.: I just want to say I appreciate the presentation at the first meeting, because I feel like I have a much more understanding of the complexities and subtleties involved in this whole process of the new focus of the Housing Authority going into the future and the question of selling. It's a much better picture than what I was reading in the newspaper.

Maren C.: I have a question. What is the relocation plan for the families that will be displaced by the sales?

Sharon O'Hare: The relocation plan consists of two phases. The first is that all residents that currently have Public Housing will continue to receive some form of housing assistance through the Housing Authority. We are not going to step back and leave anybody homeless. It will either be another Public Housing unit or what they want to take. We have a 30% turnover every year in our Public Housing units, so in a cumulative of ten you can expect 60 of those will become vacant. So another Public Housing unit or a Section 8 voucher. They automatically, because of our proposed sale and replacement, they automatically get a Section 8 voucher. In fact, we can apply for more Section 8 vouchers to the extent to replace those units.

Maren C.: Are they going to be given an option as to a Public Housing unit or a Section 8 voucher, or will that be dictated by whatever the Housing Authority needs?

Sharon O'Hare: One of the things we did with the sale and replacement was to interview each Public Housing tenant. In essence there will be an

individualized relocation plan for them. There are some families out there on the list right now who are calling and want a Section 8 voucher. What we tried to do was get an idea of who wants a Section 8 voucher and wants it immediately. Who wants to stay in Public Housing. That will be a little more difficult because we can't really depict which Public Housing units are going to come up. Who wants to look into the possibility of purchasing their homes.

There are a few of the households that could be candidates for purchase. Those folks, particularly the Public Housing folks, who want to remain in Public Housing or a Section 8, or purchasing their home, we put those as the last batch to be sold.

Maren C.: So essentially no one is going to be put out on the street or given not enough time to relocate when you sell these homes.

Sharon O'Hare: Yes. When we get notice from HUD that we have permission to sell, there is a 90 day period of notification. So if they only get the minimum of three months working with us to try to find their new house. What we will do at the Housing Authority hire a Housing Search Advocate for them to help them. If they are going with the Section 8 program, he will help them find suitable housing for them. We pay all of the reasonable moving costs. We will have somebody come in and pack them up and move to the new location, within this area. It will be within the geographic area.

Tola D.: Are all the houses going on the public market when they're for sale?

Sharon O'Hare: Yes. They're not going to get any kind of preference to buy. That's what the Board really wanted to do, was to look at giving the current occupant or even the current Public Housing resident or a Section 8 resident was for a discount in the purchase price. HUD does not permit us to do that. The Federal law requires a level playing field and allow purchases to everybody. Everyone has the same opportunity to purchase Public Housing units as one of the residents.

Tola D.: Does it come down to the highest bid?

Sharon O'Hare: Yes. It will be sold through the Multiple Listing Service. There are only two ways we're allowed to sell. We either sell through the Multiple Listing Service with a realtor, or we can sell them on the courthouse steps at public auction. Our hands are tied to the degree we can't assist with a discounted price. What we can do, and this was the thinking behind the schedule, we take those 45 houses and divide them into two groups. The second group contains the ones that have people that are interested in possibly purchasing the house, and so those people are getting the nearest time to work with all of the local home ownership programs and get themselves ready to be able to enter into a buy/sell agreement to purchase the home.

Maren C.: If you go through the Multiple Listing Service, and that differs greatly from an auction legally, so basically your contract, if it's a standard contract entered with a buyer who is ready, willing and able to buy as opposed to taking bids from several buyers. Are you talking about a different kind of multiple listing contract or the standard?

Sharon O'Hare: We're certainly thinking about a different kind of MLS listing because we don't want to pay, nor do we feel that the Housing Authority should pay, a 6% commission. So we're going to be going out with requests for

proposals from the realtors saying make us your best offer and what can you provide for us. In terms of what we need follow, though, is having them bring their buy/sell and all lot. We do need to have the asking price be the appraised value because we have appraisals on all of the units. Unless in the past year the price of housing has fallen. It will be in Multiple Listing but we may have three or four brokers.

Maren C.: There was a fellow here and I don't think he's here today, McKee, I ran into him on the street, and since he's not here I'm going to bring up his concerns. He was concerned about the new Public Housing units having play areas for children. How is that being addressed in terms of the quality--I mean the kids playing in the street is a little bit different than playing in a yard.

Sharon O'Hare: One of the things we're doing right now, it won't be Public Housing but it will be affordable housing. You know about Russell Square, the property we own, and it will have a small family housing units. And that is also one of our concerns. And that is a critical issue. If we have a lot of large families living together without adequate space for the children to play, that can be problematic as well, so we're giving a lot of thought to that.

Maren C.: That was one of his concerns.

Sharon O'Hare: The Russell Square property is not that far from Playfair, the Spartan Pool is in that area, but in and of itself, on the property itself there will be a play area as well. Then on the senior side of the development at Russell Square, there will be a really nice plaza, with seating, benches and landscape which is not on our property, but it will be a great place for senior residents to congregate. Site amenities are very important.

Maren C.: So the disabled and seniors I guess have a personal interest in that location in terms of like getting around, having independence, so obviously there's transportation, being dependent on others or using foot.

Sharon O'Hare: Yes, there is public transportation.

Maren C.: I just want to say from my point of view, I think the sale of the homes is a good idea and I think it will promote affordable housing in Missoula for Missoula residents.

Sharon O'Hare: Does everyone here have an agenda? Moving on now with the agenda. Camille and Lori are going to talk about the new Public Housing Program Administration Plan, and if you recall, last time we showed slides of the homes we propose to sell. And also the types of housing we hope to replace these homes with, in terms of multifamily. We thought it would be a good idea to show you slides this time of the housing that we're proposing to keep so you get an idea of the array of multifamily housing. And possibly we'll talk about improvements over the five years. Lori is going to talk about the Section 8 Program Administrative Plan. Lori is also going to talk about the current preference system. I'm going to turn this over to Camille and Tom who will get us underway.

Camille Watson: When we talk about the Public Housing Program Administrative Plan, we talk about the ad hoc continued advocacy plan. We will give you a

brief overview of our Public Housing Program. The Administrative Plan regulates how we treat the property that we now own. I'd like to say that Tom Chapman is my assistant and helps me run the program. Stacy is the coordinator for the Public Housing Program and Stacy also runs the admissions department. So together with those people, as well as five maintenance staff, and one contract, we manage 210 properties. If we were not funded to manage those properties, we'd probably have two people to manage the properties. The Administrative Plan forces us to have a larger staff because not only are we trying to meeting housing needs and be a good property manager, it takes a lot of staff to follow the rules and regulations. There is a map behind you that shows you all the property that we own in Missoula. They're color-coded by project. The only reason we do it by project is at the time we were funded, that's how HUD looks at it. So project one might have ten properties in it, project might have 30 units. You can see we're clear out to Lolo here, up the Rattlesnake, on the North Hills. Our properties are really dispersed all over Missoula, and we don't have large concentrations in any one spot. Our largest complex that we manage is here at Vantage Villa. There are 38 apartments here. So we don't have 50 or 80 apartment buildings. They are single family homes. In Vantage Villa, we've got duplexes, one tri-plex and the rest would be single family homes. We really have a mixture of properties. One of the flexibilities that we have is to be creative with our properties. Sometimes apartments are easier to manage because they are concentrated in specific areas rather than dispersed all over the valley. Tom is going to show us the slides of the multifamily. These are ones that we have no intention of selling in the near future. We will continue to own these properties and plan landscaping, area improvement, playground equipment. Elizabeth and myself are working to get playground equipment. We can't just go out and buy playground equipment. There are a lot of rules and regulations involved with that.

Tom Chapman: (Began slide presentation). On your question about putting the properties next to parks, this property is right across the street from the Northside Park. Kitty corner to this property are two other units, so there's 11 units total. Three of those are handicapped and they're all right across the street from a park, with a playground area. It's a pretty incredible location actually. This is our site at 102 Pullman. This is a complex of three different units. They kind of sit triangle to the back yard. These are two and three bedrooms. This is 712 Charlo. Again it's kind of backed up against the Interstate. There is also where the cars are parked is another common grassed area for the kids to play. And there's another unit down below it. There are nine units total there. This is the back side of Pullman.

Camille Watson: It's probably the best yard we've got with that common area space.

Tom Chapman: Like I said, there are three complexes at the Pullman site, it's kind of a triangle. This is the front section. There are six units there with handicapped on the end of them. So there would be four 2 and 3 bedroom units and two handicapped units. This is 811 Stoddard. Again, these are over on the North Side and my wife and I lived on the North Side for 7 1/2 years. We really liked it over there. It really is a good place to live.

Sharon O'Hare: You'll notice that there are new roofs on the units that we have.

Tom Chapman: Yes. That has a common area in front. It doesn't have



playground equipment, but again they're only like four blocks away from the North Side Park. There are good schools on the North Side. This is our Toole site, 1201 and 1209. Three and four bedroom units.

Camille Watson: This is a good picture of Toole. More than 50% is site problems. Location, it's right behind. There's an alley right in front of the properties. We've done numerous improvements here, and it's a tough apartment complex.

Tom Chapman: There are three units there. One is in back which is four units, and the one off to the side three units, and where I'm standing, behind me are the other four units.

Sharon O'Hare: You might mention the conversion proposal for there.

Camille Watson: We have submitted a proposal to HUD to change these out from three and four bedrooms to one and two bedroom apartments. One of the main reasons that we chose to do this it is not a good location for families. There is no common area for kids to play. We tried putting in playground equipment. We're really hoping to change that in the couple of years and hope it will work better with smaller sized families. This has been a challenge forever. 50% of it is the site itself. One of the main problems I think, there is no back door, so every apartment has just a front entrance. The back yard, though fairly large, is wasted because there is no back door to go back there.

Tom Chapman: This is 1819 Southwest Higgins. This is a three-plex and the one at the end is a handicapped unit. This is 4th Street. This is the back side of 933 South 4th West.

Camille Watson: You will see the finished decks that are a nice addition to the apartments. You can see a lot of these design-wise are tough. We know we have some site problems with landscaping and security and problems with kids. A lot of these buildings were stuck with. HUD won't allow us at this point to sell and replace those units. We're constantly striving to improve these places. On 4th Street, even though we put on decks and painted them, they still look a little like Army barracks. They're sold and sound structurally. They're very easy for us to maintain. They're close. So we've had to come up with some creative ways to make them aesthetically a little bit more appealing and a little bit more family. That can be very costly. We feel we're doing our best to improve the properties but it takes time to do that.

Tom Chapman: These are the Russell Park properties.

Camille Watson: We have two family homes and townhomes at Russell Park West, which is right across from the YMCA off of Russell. These are individually fenced. I'm going to talk about the plan. Feel free to interrupt me at any time. Sharon handed out a table of contents for the ad hoc plan. This is our bible. This tells Stacy in admissions, ourselves, maintenance every step we need to take when it comes to how we treat our residents, what steps we take to verify income, household size. It makes sure that we're doing our jobs correctly. If you want to check out the plan, we can give you a copy of it if you want it.

Christine G.: Why won't HUD allow you to sell and replace multifamily units.

Camille Watson: My understanding is, if we could prove to them that they were inefficient, which they're not, they're much more efficient to maintain than our single family homes. If they were unsafe, obsolete. Unfortunately, they're not. They do have some aesthetic problems mostly with landscaping. This is the first year we've got some cash to invest in playground equipment.

It's not the actual apartments themselves. When you compare these to other properties, I think it's a problem you're going to see all over town. We want them to look nice and we want something to do at the apartment site. I've copied you off the Table of Contents. I picked out topics that I thought would bring up some discussion and things you might find interesting. The first chapter that I wanted to look at was Chapter 2, on page 2-1 of the plan.

What is different between the Public Housing Program and the Section 8 Program, Stacy has not only the task of not only keeping my Admin Plan separate from the Section 8 Admin Plan, in the Public Housing Program we look at many more details of our applicants than the Section 8 Program. We run our business like we were a property manager, except that we have income limits program-wise. We have some very strict rules on what types of renters we have. In the Public Housing Program, you are required for admissions to have three good rental references. Every situation is different. We certainly can waive those three rental references if, for instance, the applicant owned a home and lost it. If they are so young there is no way they could have had three rental references in the past. So we do make exceptions to that rule occasionally.

Maren C.: What if they didn't move three times?

Camille Watson: We can make exceptions, but overall that is our requirement.

There are several families who can come up with four or five references, but they may not have three that are positive. Another area we look at is the credit report. There are several different areas we can look at. If poor credit came from the fact that you were paying more than 50% of your income for rent we would not look at that as if we were looking at someone who was not paying more than 50% of the income for rent. We can request a home inspection of their prior to rental.

Dave Gentry: You can request to go into a person's home?

Camille Watson: Yes. I haven't done it very many times, but the times that I have were beneficial to applicants in two cases. Both cases I had, they had like virtually no rental references. The woman was married and owned her home, went through a divorce. Husband took the home. She was almost homeless. I met her at her home. I have to know that at a minimum that you're keeping the home clean.

Because of the rules that Congress has set and HUD makes us implement, we are seeing almost every part of the applicant's life prior to renting.

Jodie U.: Do you have criteria guidelines for those inspections? Is there something specific that you look out for?

Camille Watson: We would use a checklist as when you are moving into a property.

Maren C.: I have a question in Chapter 2 here, the responsibilities of tenancy. In the case of applicants for admission, the applicant's physician

or social worker will be a factor in this determination. That seems to me--I guess I better ask you, what kind of people do you have questions about that with?

Camille Watson: Say a family whose credit references are good but they've always lived in an apartment. The only Public Housing unit I have available is a four bedroom home with a yard, garage, lots of landscaping. I'm going to want to know is there anything that is going to keep you from maintaining this lot, from removing the snow in the winter. Let's say, for instance, that it's a single parent, four kids, a four bedroom house. The yard isn't fenced. Are you going to be able to--and this all comes out in an interview that Stacy and Tom has with the applicant--are you going to be able to maintain this home, are you going to be able to abide by the lease, which states you need to supervise your children at all times. Issues like that.

Maren C.: This looks to me like it's directed at people with disabilities, because of the fact of the capability of the person's performance. And then it refers specifically to a physician or a social worker.

Camille Watson: Right.

Maren C.: So a person with four kids without good rental references isn't necessarily so that a physician may have nothing to say about their ability to take care of a home, and they may not have a social worker. So it seems to me that this--

Camille Watson: Is directed towards a person with disabilities?

Maren C.: And it also seems to me that it might be in direct conflict with the ADA.

Camille Watson: I don't believe it is.

Maren C.: Depending on how it would be administered.

Camille Watson: Right, and we would be extremely careful when we start any of the mays. We may do inspection for housekeeping, and when we do so we have to have the reasons why. We may talk to your physician or social worker to see if the person is capable of maintaining his home.

Maren C.: What would prompt you to talk to a physician or social worker?

Camille Watson: If we had a question of whether the renter--this has nothing to do with whether they have a disability or not--but if the resident is capable of maintaining the home and abiding by the lease. If he has never abided by a lease in the past or if it looks like they haven't done a very good job of abiding by the leases in the past, what's changed. Someone has to verify to us yes, we believe they are capable.

Maren C.: How is a physician going to know that they're going to be a better tenant?

Camille Watson: There are cases certainly where this can come into play.

Stacy Otto: At an apartment complex like Vantage Villa where we have 38 apartments, and you have a gentleman who decided he is never going to cook and he could have used the oven for storing his class records. There might be a fire hazard that would affect this whole building.

Maren C.: And how is the physician going to let you know that?

Stacy Otto: I'm saying that, for example, I might find that out from a past rental reference, or I might find that out from an inspection.

Maren C.: Typically, a physician or a social worker can answer questions about a physical condition.

Stacy Otto: A high percentage of all the applicants that apply have a physician or some type of case manager or case worker that works with them closely.

Maren C.: I understand that, but I've had experiences where a lot of times I rent an apartment and told the person I was legally blind, and they said, how are you going to take care of the apartment. Well, it's like I lost my eyesight, not my ability to function or my brain. This seems to me to go directly to a person's physical capability or mental capability of caring for their apartment without any notion or any reference to the reasonable accommodations that that person may make. I can't clean my house by myself, I simply can't. I can't see well enough. I have to hire people to help me. I have to have friends come and help me. So does that make me a bad tenant?

Stacy Otto: Not at all.

Maren C.: But what I'm saying is, let's say that I present with a serious mental illness. Does that make me more at risk for being a bad tenant or not.

What if I was a OCD and I cleaned constantly. It just seems the possibility for discrimination is high. An invasion of privacy is high. And I think if this is administered in a way that is very cognizant of those possibilities, that it could be okay. But if it's administered--the way it's written, there's a broad range of how this could be administered in a discriminatory fashion.

Camille Watson: True. And you will see throughout this Admin Plan there are numerous "mays" and there are numerous "risks." If we are not extremely careful with how we handle things like this, we can be in a big trouble. Let me tell you, this is used very, very rarely. If it is used, we have a release signed by the perspective tenant.

Maren C.: They don't have an option. If they don't sign the release, they don't get the housing.

Camille Watson: That's not true. Every situation is different.

Stacy Otto: We rely on referring to other businesses. And a lot of times the

only reason that isn't pressed on, is somebody has a need and they don't know who to go to, and so I hook the person up with Dave, get a release signed, and this person never even knew that Community Exchange existed or WORD.

Maren C.: You guys probably do a reasonable job with this, clauses like this frighten me, because they depend on the good will and intentions of the person who is administering them. If you have a person who may have certain biases or is not educated in areas of disabilities, etc., then it could be administered very unfairly and be a violation of the ADA, which would expose the Housing Authority to litigation.

Camille Watson: Right.

Sharon O'Hare: Has this part of the Admin Plan been reviewed by our attorney.

Camille Watson: Yes. This is the new Admin Plan. Maren, you're absolutely right, it's really scary.

Maren C.: I just see that it really opens up--first of all, liability, and secondly and most importantly, I guess, is unlawful and unnecessary discrimination and doesn't take into account what accommodations a person may or may not make in their own life. It assumes things about a person based on whatever it is.

Lori Davidson: Camille, if I could ask. Under the fair housing laws, we are not allowed to offer a person reasonable accommodation. They must request it.

We can advise all of our applicants and participants that we will welcome any reasonable request for accommodation, but if you're sitting across from me at the application table, I can't say you need special accommodation. You have to request it.

Maren C.: I understand that, but what I'm saying is, if you take someone--let's take a blind person--can they take care of a house. I think if people don't understand that type of disability, they may say I would say not. This person is not a good candidate, they're not going to be able to clean. That person may make those accommodations on his or her own.

Camille Watson: We would never say that. Ed would beat us to a pulp if we did something like that.

Maren C.: I think that probably the biggest problem for me is I most worry about people with mental illnesses here. This is my biggest concern.

Camille Watson: It is frustrating, and again, what makes it tricky is because every situation is different.

Jodi U.: I can actually speak to that because my disability isn't a problem.

While I share very strongly the concern of people with disabilities, I see that particular requirement as actually being a plus for me. Because what it says is, if I walk in here and Stacy sees discriminatory treatment at one point in time, so she requests of me perhaps more than she might someone else.

The fact that that clause says the physician or social worker can make a statement on my behalf protects me. My physician is going to know if I'm capable or not or the social worker is going to know that. But I am able to combat that because of that clause. I can say look, I can do this, I can take

of it. You have the documentation regardless of what may or may not be felt personally, but this way it's an agenda. And the discrimination exists, but not in my case here, don't get me wrong, but it's discrimination for people with mental illness, people who don't know they have mental illness and suddenly discover they are. So the fact that those things are expected is actually a big protection. My physician knows what I am capable of doing so he can easily address that situation.

Maren C.: I think you're right, but I also think it could go the other way.

Camille Watson: It can be a plus or minus for the applicant. It could be a big minus for us as employees to administer it incorrectly. When I talk about admissions, the flexibility that HUD gives us to admit families who may not meet the initial criteria, but because of three bad rental references because they're an alcoholic, they're recovered alcoholics now, we can waive those three or five bad ones and give them a second chance. There are a lot inconsistencies in the Admin Plan where you see it will say this is the rule, but if the applicant has--say, for instance, you have a drug addict, our rule is if they've been convicted of drug activity in the last three years, they can't come into Public Housing. But if they've gone through rehab, they've changed their life, or the person who was in the household and was busted with drugs is no longer in the household, they give us the flexibility of saying give this family a chance. It's really gray, but most of the time I see that gray area as being a benefit to the applicant.

Elizabeth M.: I see Camille right smack dab in the middle of two big icebergs, on one side are the may complex rules of HUD and government agencies and all their myriad of details, and then on the other side residential needs of many different people. I hear your concern about confidentiality and invasion of privacy, and I remember here two weeks ago about wanting to make housing accessible to people who will make it a successful experience, and if you don't have the opportunity to cast a wide net initially, you may set up somebody who for whatever their special needs is, turns out to be unable to take care of the home, and then you have to turn around and evict them. What are the long lasting affect on them psychologically. And another thought too, though, as I wonder if a lawyer review it, have somebody with extra training in this area. Not just your lawyer, but somebody with training in this area to go through with a fine tooth comb.

Camille Watson: The Fair Housing has reviewed this, but again, when they change the song, they will revise this Admin Plan too.

Maren C.: I'm not disagreeing with any of you, and I think that probably this Housing Authority administers this clause fairly. But, other Housing Authorities may not. And if this particular cast of characters leave and a new cast of characters comes in, you still have this thing that can be used. And I read somewhere in the goals that some of you guys gave us last week, that the Housing Authority wanted to not only be the experts on housing in the area, but also wanted to be a service broker. So I guess I see the situation you're talking about where you might put someone in a unit where they may not be able--or prove that they really actually can't take care of it, maybe they need some help. They need to be hooked up with some of the social service agencies that will make the housing experience successful rather than evict them.

Camille Watson: Believe me, it is so hard to evict, especially if it's someone with a disability, for unsanitary conditions, not mowing the lawn, etc. It almost never happens. That's why we have Dave Gentry, you got problems, you get a lease violation, we'll say call Dave Gentry if you need help. Call Dave. We have since I've been here, we have evicted a couple of people with disabilities for I believe unsanitary conditions. But we also went through Dave, we went through Adult Protective Services, we went through everybody before it actually happened. I feel like we are currently brokering those services. I'll bring it up to Tom Orr and have him look at that again.

Sharon O'Hare: I don't want to interrupt, especially the dialogue that is going on, but I'm thinking that we need to go to Section 8. However, we can also do that next week as well. This is important stuff you're talking about. I'm not concerned if we don't get to it today, we can get to it next week as well.

Lori Davidson: We do have to do preferences today.

Camille Watson: The second area of interest that I wanted to talk about is called deconcentration. This is a new HUD rule, or a new law. HUD gave us that to implement through QHWRA which is the Quality Housing and Work Responsibility Act of 1999. These changes happen to Public Housing, and I'm here to say most of them are going to be implemented this summer, so we're going to have some resident meetings, we're going to have a lot of comments on these changes because they are tough. Deconcentration is interesting, especially for me, and I'm sure for the applicant too, you start to feel like this business is very inconsistent. We have income limits for admission. These figures here are income, and these are household size. Here is an income level, if their household size is here. 40% of all have to be at 30% of median income or below, which is very low. So 40% of our building has to be at or above 30% of median income. Okay, we can handle that. We can do that. So your admissions may exceed that 30% mark. In Public Housing, we're doing great. We're at roughly 50% of our new admissions are at 30% or below.

Okay now they say a new law. You cannot, as of October 1999, when the deconcentration policy was set, I cannot put all low income people in Toole and all very low income people at Phillips. I have to mix and match, which when you look at our housing stock is tough because we're spread all over Missoula. So what we need is a plan. Okay, we're going to look at each project and what we've done is take the current residents who live them, we add up their current level of income and reach an average. The persons that rent at Toole, if the average income at Toole is \$14,800 up, the very next person to move into Toole has to have an income higher than that. The reasoning is good. HUD does not want all low income people at one apartment complex and all the people who are higher income at another site. But it's kind of inconsistent because you have to 40% of the occupancy at 30%. You have all lower income, but you can't put them all in one spot. So I have people waiting on the waiting list, they should be number one on the waiting list, but because of their income they drop down to number 10 and they're waiting for housing. Congress makes the laws, it's a law. You don't know who you're trying to serve at times because they'll tell us one thing on the one hand and on the other is mix everybody up. Another interesting thing, we have a four bedroom right now available at Toole, if I have no one qualified for that four bedroom unit at the time of the vacancy, I can rent that unit to an over-income person. They could be complete over income, I can pull them off the street and rent them that place. There are families that could use a rent

break for a four bedroom house. So there is a lot of flexibility. The interesting thing is, we have to document every time we use one of the new laws, because you cannot discriminate against any one else on the waiting. So each time Congress makes a new law, it makes our job more complicated because you have to track everything that you do.

In terms of deconcentration, the other thing we can rent at discounted rates to police officers. For deconcentration purposes, say, for instance, I can't find a big four bedroom home, I don't have any four bedroom houses we need to deconcentrate on the income target, I can rent to a higher income three bedroom family.

Deconcentration hasn't posed too much of a problem. Before this started, we started looking at different proportions. Are we concentrating certain income people in a certain area. Keeping them mixed is a little extra work.

Another thing I think you will find interesting is Chapter 11, 11-4, income reporting requirement. The rule in Public Housing is if there is any change in income or compensation, you have ten days to call our office and report that change and make in income, we make a recertification of income. A lot of different Housing Authorities have limits on their income increases. We do not have that. With any increase, you've got to call me. This is an area that creates tons of paperwork for staff. Your income at \$50, you've got to come in and your rent may change by two bucks. It's got to be hard on the resident. So this is an area where if we had a Resident Management Association, they could voice their opinion on this and maybe we would do like other Housing Authorities and set a limit. Let's take \$100. If you income changes by more than \$100, a lot of Housing Authorities change the rent once a year. We don't know how many residents would be out if we did that. We need to find the time to do a study, if we go back six months, how much rent money would be lost. We survive in Public Housing on our revenues and we use those funds to keep our properties up and maintain them.

Tola D.: I work at Opportunity with people on disabilities, and a lot of the people I work with have rent assistance, and when their income changes with their jobs, and the way I feel about it personally what I tell them is, this isn't an entitlement, this is a privilege and I think you're getting this assistance and these are the rules that go with it and you can choose not to participate. It's not an entitlement.

Jodi U.: How often does it happen?

Camille Watson: I think it's probably anywhere from 30 to 40 recerts a month.

Elizabeth M.: I was coming in every month last year because I was self-employed. I had started my own business and I was here every four weeks.

Camille Watson: We lose money on recerts too, because remember, we also have to give you 30 days notice of an increase. So if you come along and it increases this month, your rent is increased two months from now. And remember when your income decreases, it's an automatic drop in rent the next month. What we would like to do this summer, we would like to take a proposal to our Board for a "no cash" policy. We are currently collecting roughly 210 units. That on a monthly basis reflects \$35,000 to \$36,000 in rents, and that does not count Section 8, Shelter Plus Care, security deposits. And for the



safety of our residents we would like to encourage them not to use cash. Staff is concerned about the liability of having that kind of money around. It would be much smoother and much more efficient if we went to no cash. I think this issue was raised to the Board in the past and it didn't go over very well. People felt it was a person's right to pay cash.

Lori Davidson: If I could add to that. Most Housing Authorities don't take cash. They changed their policy years ago, and the main reason was the security issue. We have a lot of cash on hand and it's a real risk for our staff and for our residents coming back and forth. The way we would implement something like that, should we get positive feedback from you folks and from our Board, is we would give perhaps 60 days notice and give people a list of where the cheapest money orders were, to give people a list of places that you can go to get them. And try and give them some lead time if we could to encourage them use this process. Our main concern is this is a big security risk for us and for you when you come in to pay rent.

Jodi U.: You said it didn't go over well?

Rose Murphy: I think it got talked down by Staff actually. It didn't go to the Board. We had one staff member that worked at a casino and she was used to working with large amounts of cash. But we don't have any security system out here. We don't have patrols. We don't have a guard. At that time I was the one that was collecting rents, and I had a little tiny office with no exit other than the one entrance, and I was very nervous because there are large amounts of cash, and if you don't have an escape route, you're right there.

Camille Watson: And a lot of the problem is that people will want to pay cash. I think we can sell the idea. I'm kind of a cash person.

Maren C.: Maybe you could set up an account people could just pay into. You have an account and the person, if they want to pay in cash rather than come here and pay it with a check or money order, just go in and have an account number and say put my rent in there. I don't know if that would create a great accounting nightmare.

Lori Davidson: There would be another party involved in the rent collection process. I think that would be a real mess.

Maren C.: I think a no cash policy is fine. You might get robbed on the way to paying it.

Stacy Otto: When I collected rent, you would be amazed at the number of people who put the cash in the drop box in an envelope with their name on it. There must be a tool to help these people learn--I might be honest but some day the person might not be so.

Gloria Fortier: Or people not put their name on it. I have \$300 cash and I don't know who it belongs to.

Christine G.: I pay my rent in cash because some of the issues are I have to take an extra trip to go and buy a money order and the cost involved in buying a money order. It's easier for me and less expensive and it takes less time for me to drop cash off and I always get a receipt.

Maren C.: Is there a reason not to have a bank account? I'm just curious.

Christine G.: I have a savings account, but not a checking account.

Stacy Otto: They can really be expensive. They are \$4 to \$7 for a bank.

Gloria Fortier: My bank charges \$4.

Sharon O'Hare: Would it be appropriate to wrap this up? We would plan to finish at 1:30, and if we went to 2:00.

Camille Watson: These are the QHWRA changes that I copied off. Maybe if you could review them, we can talk about it next time.

Sharon O'Hare: We will run over the preferences, but before you leave, I want you to know there are the Albertson's gift certificates for you.

Lori Davidson: One of the advantages of using a money order, you have proof you paid your rent. If for some reason your cash payment is lost or is misplaced or we forget to write you a receipt or to print you out a receipt, you don't have proof you paid your rent.

Rose Murphy: Sometimes we mistakingly place a different person's name on you. That doesn't happen very often.

Lori Davidson: We can talk about that a little bit more the next time we meet too. You can think about it while you're pondering this. Staff would like to go into the changes for preferences on the waiting list. We used to have preferences that were three federal preferences. A couple of years ago they said we're not going to use preferences any more, you can do whatever you want. And this is the system that we came up with. We talked to people at other Agencies. At that time there was a Resident Management Association. And based on HUD recommendations, consultations with other Housing Authorities, we came up with a set of eight preferences. This is brand new. We haven't done any of this stuff before because it's brand new. So it will kind of test things. At that time HUD was also saying that we want you to concentrate on what they call the working poor. People who were employed but were still under income levels and still needed service for housing. They really encouraged us to use this working family preference. If you worked for a minimum of three months at \$20 a week, you got a preference for housing. You were to be ahead of other people on our waiting list. If you use the working family preference, you have to include the elderly or disabled people as well. So you got three points if you're working or if you're elderly or if you're disabled. The other one is one of the old Federal preferences. If you're paying more than 50% of income for rent and utilities, you get a preference point.

Stacy Otto: Who is familiar with the system here?

Lori Davidson: If you came into the system more than a couple of years ago, this didn't apply to you. This is a whole new system. This is what we're offering. The transfer preference is something we do internally. You can apply for a transfer preference. If you have too many people in your Public Housing unit and we can't move you to a bigger unit, we'll give you a transfer preference so you go to the top of the Section 8 waiting list. Or if you

become disabled and you're in a Public Housing unit and you can no longer climb the stairs, a lot of our units are two-level, and you need a one level, you will get a transfer preference and give you a voucher so you can go out and find a one-level place to live. This is only by government action. If your house was condemned by the health department or if it burns down and the government declares a disaster area, that will apply. These are the ones that we're really concerned about here. What we found as we administered the preferences is that it's really hard and it's really confusing and it's really unpredictable. We think that it's time to change it. It takes a huge amount of Staff time and a huge amount of time on the part of the applicant. Everytime one of these things changes, they have to call and let us know. And if they don't call and let us know, and they come to the top of the list, when they come in for their final interview and we find out it is changed, oops, you're no longer at the top of the list we'll talk to you about it later. If your circumstance changes by the time you make your application and we're ready to offer you housing, we can't offer you that housing. Things have to be true at the time we offer housing, not since the time you were applying.

On the second page of your handout here, there is a list of disadvantages of the system. Because we're short on time here, I'm going to ask you look through that.

Stacy Otto: No matter how long you've been on this waiting list--last month we had a gentleman that finally received assistance and he was on the waiting list since 1989. A couple of other applicants, off the top of my head, were from 1987. And we didn't immediately give them assistance because they're working, they're going to school, they were victims of domestic violence within the last year. One of my biggest complaints on the system, you take somebody that's elderly or disabled, they get the three points, but the opportunity for them to get the other points is not as high as the working family. So a lot of times you take an elderly person, they can't take education and training as a preference. Those are to prepare for the job market. For example, somebody that is 75 years old that has no intention of going back into the job market, they're not going to get that point. So that person is always going to be bypassed on the waiting list as other people apply. That's one of the biggest problems with this waiting list.

Christine G.: I'm curious to know why homelessness would eliminate it as a preference?

Stacy Otto: It's a reason we would like see go away. There's no way to verify it. And when it comes right down to it, to be totally honest with you, they're lying to me. I have no idea. It's so easy to go down to the post office and open up a P.O. Box so they can get that preference point.

Christine G.: I had to verify it.

Stacy Otto: Another concern that we have, an applicant that has family in town where they're staying with their friends or family, they don't get the opportunity to rent, so there's preference for other housing, you go ahead of them. Every situation is very unique. For some people this system works good, but there is one individual that comes into orientation that I've seen, this system is doing them wrong. Somebody that is collecting unemployment because they laid off by their employer, is no longer qualified for the working family preference. Unemployment checks many times are not very big

and they might move that assistance down from when they applied when they were employed. They might gain the one point for rent and utilities, but that still doesn't make up for other points that they're losing.

Sharon O'Hare: Christine, your point was they've discontinued the preference for homelessness?

??: There was preference for substandard housing at one time.

Lori Davidson: The Federal Government did away it. They didn't want us to just house homeless people anymore.

Christine G.: My understanding was that you weren't just housing homeless people, but I can't think of a more valid reason for you to give public assistance than being homeless.

Lori Davidson: If you look at it from Congress' point of view, they're looking at the amount of money that it cost to run the program and if you give preference only to homeless people--go ahead.

Gloria Fortier: I just wanted to address that same point. At that time homelessness was a preference. What was happening and what they were seeing happening, people weren't verifying that they were homeless in an area. So we had 400 people from the State of Washington and 500 people from the State of Idaho that were on the waiting list in the State of Montana. And they were doing that and not reporting back to where they came from because their waiting list was 15 years old. I think that's initially why they took away all the preferences because that was happening in smaller cities.

Christine G.: So it wasn't standardized across the country then. I'm sorry, I got the impression from HUD and Congress that it was and then it was taken away.

Gloria Fortier: They were at that point, they were standardized. But somebody from another state couldn't apply for your waiting list and then take Montana vouchers and move to Washington.

Christine G.: You can do that anyway, whether you're homeless or not.

Gloria Fortier: No. To be on our waiting list from Washington, you have to live here for one year before you can take it. It stopped a lot of that.

Elizabeth M.: I would hope that HUD with its ability to microscopically annex could leave a little extra room for true homelessness. I'm getting a little emotional about this, but that was my big dream. I was a single mom on welfare, free of a domestic violent situation, and I was terminated from my home because there was a felony. I get all choked up about what I had done. What would somebody in my situation do now days. I wish HUD could focus microscopically on tiny little details in people's lives. I can certainly understand wanting to keep the fraudulent people out.

Stacy Otto: I think this worked great in your situation, but can you understand what a family separates from. I want that opportunity for everybody.

Elizabeth M.: But include lots of potential situations as considerations.

Lori Davidson: Let me tell you where we would like to go with this and maybe it will address and maybe you can come back and tell us what you think about this. Because our experience in the couple of years--this is a really cumbersome system, it's not a level playing field for the applicant. It is administratively a lot of work and a lot of work for the applicant. Where it's going is it is prioritizing working families and people in those situations. But now we're starting to think that maybe that's not our highest priority here. Maybe we don't want to give working families preference. Yeah, they have a need, but there are other households that have that need too. What we're looking at doing is going to a level playing field and say, first come, first served. And that is true for elderly and disabled and families of two or one person. And they would be admitted on a first come, first served basis. The date and time of you application. And then other singles. The reason we're suggesting that we do this, although there are two options and one could go date and time, the other is to go with the date and time and have people other than elderly or disabled or families with two or more be at zero points. Our reason for doing that is, we're a university town and right now is that we have 500 students apply for housing and because they have certain ??????? certainly in the fall time. The students have access to housing that's not available to other people in town, so we're feeling students aren't our highest priority to give them housing. We would like to weight them at zero.

Rose Murphy: It would be single students. It's not families.

Stacy Otto: A pregnant single woman is considered a family.

Lori Davidson: Their regulations allow us to do it. They say you don't have to have any family. We can go to those that are waiting for housing on a first come, first served basis, and many Housing Authorities are going to that. It makes a more level playing field for people who have been waiting for housing. It serves the elderly and disabled. It seems to be a more equitable way to deal with people who move in.

Tola D.: It's sort of like the way your rearranging the unit sizes to meet more and you need to make it more equitable.

Lori Davidson: Right.

Stacy Otto: Plus you will be able to tell about when they would be receiving assistance. If somebody became number one on the waiting list right now for three consecutive months, those three months we may not be giving out assistance and the next month we are, and all of a sudden I get five people, ten people that apply that get more preference points and they're shot down. I have watched applicants do this and everytime there's a top who's on assistance everytime it's available. It's so frustrating for the applicant and for myself taking all those phone calls of frustration, and those people who have been on the waiting list for years or the household that is homeless that can't take the preferences, they can't find a job or there's nobody hiring me because I don't have a residence. All these families aren't getting their needs met.

Lori Davidson: The other way that we could help address your issue with the

homelessness, is that in the Section 8 program, we all know a little bit about income charting. Where 75% are at 30% of median or below. 75% of the people that we admit into the Section 8 program have to be at below income level. So the Section 8 program Congress said this is how you tell low income people. It depends on family size and your income can't go to \$12,800. In order to meet 75%, we're going to have to skip over higher income people on our waiting list to meet the income charting.

Sharon O'Hare: The way to think about this one preference point system.

???: In a situation where everybody is at the same level, and I understand why you would do it. For the people who have low income and you pick up on Section 8. When I became disabled I was having a full-time good income and when you're disabled (tape change)---- people who have children and trying to take care of them who don't have a large opportunity to make more income. I see a bigger need there than for families who have jobs and are working and have the opportunity to make more income and take care of themselves.

Stacy Otto: Getting rid of that working preference and being able to help those families that aren't working 20 hours a week, or not consecutively employed.

Gloria Fortier: You address the low income people first. The very, very low income people with all the situations.

Elizabeth M.: Some of the concern about homelessness, and luckily I don't have to speak from experience, but I'm just trying to imagine if I tried to stay here how would I have kept down a job without a place to live. So if you don't have a residence it would seem like keeping a job would be extremely difficult. So I don't see that the 75% margin or percentage addresses the needs of someone who doesn't have a roof over their head.

Maren C.: How about those that lose their home.

Gloria Fortier: We do have a program in place, it's called the Shelter Plus Care Program to assist people who are homeless and have disabilities. We recently got 20 more slots to house people so I welcome applications for homeless people with disabilities right now.

Maren C.: If you're homeless with a family without a disability?

Gloria Fortier: You have to have a disability.

Lori Davidson: The homelessness is difficult to verify. There is a lot of fraud. What we are working on at the Housing Authority with other social service agencies is trying to find more transitional housing which is where we're thinking that that homeless need can be best fulfilled. In the Section 8 Program, landlords do their own screening. In the Public Housing Program, we have regulations too.

Maren C.: Ultimately it would be nice to have a place to put homeless people in that transition phase and then go from there.

Lori Davidson: Get them ready to be in housing. We are working on that.

Maren C.: I guess, working at Legal Services, I ran into over the time I was there as an intern and as an attorney, a lot of situations like hers which there was domestic violence, the mom and the kids needed to leave, and basically stayed or went back because they couldn't afford to find a place to live. I think that's sad. On the other side of that, I also worked with family law cases where the women insisted they weren't going back and went back and went back and went back. So it's a frustrating situation. For the people who really truly need to leave and if it explicit they can live, you're helping that person, you're helping those kids, those kids aren't going to grow up in an environment--I've had homeless people that I know are homeless because they can't call me on the phone, they've got to stop in every four days, they're filthy.

Christine G.: There seem to be some assumptions made about homeless, the homeless in general, that they're transients usually, single, mostly male, mental problems, etc., etc. In my case, my landlord simply--I had two daughters and a cat, and landlord just told me one day that she needed her apartment back for her mother who was coming from California. Middle of winter, it was January, and I happened to be on the list, had been on the list for five years. At that point, I believe it was Rose who told me that--I checked in and said I don't know what we're going to do. It's the middle of winter in Missoula, she needs her apartment in a month. I asked her at that point if she would write a letter for me to say that, and she said okay.

Lori Davidson: The other thing about your case is, you were out of housing because your landlord wanted the apartment. You must have been paying rent there. You must have had some income. You weren't necessarily homeless. You were temporarily homeless while you were moving from one apartment to the other.

Christine G.: If I had not been considered technically homeless at that point, I would have waited another five years.

Rose Murphy: I had to meet two points. One, first of all, in previous experience that I've had with the Section 8 vouchers and providing the vouchers to homeless families and individuals, we had a great number of those vouchers that were issued that were unsuccessful in locating housing. It was very frustrating for us as an agency to do all the paperwork to get them processed, give them a voucher, get them out with the voucher, trying to get them leased up and they wouldn't lease up for one reason or another. That was very frustrating for us. And then the second point that I wanted to make was, the working preference also divides, because HUD told us as an agency we have to start generating more income for our agency so that we were able to be here in the next five to ten years. So this is why we came up with these preferences previously also.

Tola D.: I think you could use the combination of the preference plus your waiting list by putting on a limit on the number of times somebody gets to the top.

Lori Davidson: We're not allowed to do that.

Robert S.: I'd like to throw something out. When I got here I was completely homeless. I came here with a backpack and a habit and a real hard road ahead of me. The only thing I had in my favor was the Hilton downtown here, the

Poverello Center. And you have to sign a piece of paper there kind of like a receipt and I had that. And a year waiting here. Bouncing in and out and doing the paperwork. Its been a godsend in my life that it happened the way it has happened. People need help but they should put the applied effort towards it too.

Gloria Fortier: That's why we're trying to initiate more transitional housing so they have the training, so when they get to the point where they're on the top of our list, that we can put them in then and have a success story. We want to see more success stories.

Richard E.: I just want to say, I have sympathy for Robert and other homeless too. I understand it is doggone hard.

Lori Davidson: That's part of our dilemma too is the number of people on our waiting list and we can't help them.

Camille Watson: I want to say too, that if we do elect to get rid of all preferences and have a first come, first served, I think it will help a lot more. In one aspect, we're going to be housing people that we're housing now.

Stacy has to verify all these preferences. The Public Housing Program is not going to be as effective as Section 8 because it will still be first come, first served, but the first come, first served approved. You might be number one on the list, but you have to have the rental references, whatever. So Public Housing is not going to be as effective as the Section 8 Program if we get rid of preferences.

Lori Davidson: This is a final note on the definition of homelessness. If we give them all the preferences, where do you draw the line. If they're not renting a place right now and your mom has a basement and you're staying there with your kids. Is that homeless? It's really hard for us to determine the definition of homelessness, and the Shelter Plus Care is your on the street and you have nowhere to go. Your not in a transitional housing program, you're not in a hospital, you're not living with relatives, you have no friends you can live with, you're on the street. You have no income and no ability to find a place to live on your own.

Richard E.: You lived under the bridge until they put the fence up.

Lori Davidson: So that's one of our problems too. If you go back to this preference, how do you define it. How you do you make it fair so you're not getting people who have other options. It's a real problem administratively.

Elizabeth M.: It seems to me to focus on the additional opportunities might be a big part of the answer, because for people--and the Housing Authority I am sure is aware of this as a property manager, you can have people in those rental situations so after a period of time they're at a very low level. I came in with AFDC and food stamps, and my rent was \$350, and I don't want to bore you with the details, but if the rent I was paying wasn't there it wouldn't have got me anything here in town, so I would have been homeless. I think it sounds like focusing on the transitional opportunity as the alternative response to taking away the homeless category may be a big part of the solution.

Lori Davidson: We've been working with the YWCA because what we can do in the



voucher program, is take a number of vouchers and say we're going to use these vouchers specifically for people who are in the transitional program at this place. And we have the ability to do that. We definitely have a transitional program right now such as the St. Joseph Center.

Dave Gentry: It's all for families.

Lori Davidson: And they address specific problems, but what we are really working on here and finding a way to deal with those kinds of problems in a transitional situation so they're ready to go into a permanent housing situation.

Sharon O'Hare: Our process doesn't necessarily meet that immediate need of people who are at risk of being homeless. What we should be doing in our strategic planning process is doing more transitional housing so that we can immediately address the crisis situation and not try to use the admissions preference.

Elizabeth M.: Sort of a service brokering.

Sharon O'Hare: That's kind of what I'm hearing.

Lori Davidson: That's a good point. The Housing Authority isn't now and never has been emergency housing. There are other places in town like the Poverello Center that pick that up and we need more of them, sure. But our mission is not to provide emergency housing. We're looking to house people in different situations, situations that are considered permanent until they can get on their feet and become self-sufficient. So the mission of the Housing Authority is a little different from transitional or emergency housing place.

Sharon O'Hare: Let's wrap this up. I don't know the social services. This is really informative for me to hear my colleagues explain this stuff to me that I was too embarrassed to ask. Thank you for giving us 20 more minutes of your time than was originally thought. We will have QHWRA on the agenda next week and talk about what standards are coming for the Public Housing Program as a result of the Quality Housing Work Responsibility Act. Lori is going to have her discussion on the Section 8 Admin Plan.

Lori Davidson: I don't feel that we've gotten a resolution on the preferences.

Gloria Fortier: Lori needs something to take to our Board. We still have to go through resolution and it has to go before our Board. So I think what she needs today is some kind of--are you in favor of dropping the preferences, leave them in place, or have a more fair, first come, first served.

Lori Davidson: We can come back and talk about it next week. You have some information that you can look at and work on. The other thing to know is that Shelter Plus Care rules don't apply. They have different admission rules. There the rule is that you must be homeless and you must have a disability. The Shelter Plus Care Program, these changes do not apply to that program.

Sharon O'Hare: We'll have a discussion and revisit this next week. There will also be a few more things on the agenda and we might have to meet one more time to take on the one year plan. We have a meeting for May 31, and

we'll talk about whether we need to go on longer. Thank you all for coming.

The meeting adjourned at 1:58 p.m.

MINUTES

SALE AND DISPOSITION OF PUBLIC HOUSING UNITS

INTERIM BOARD MEETING

MAY 31, 2000

**IN ATTENDANCE**

Missoula Housing Authority: Sharon O'Hare, Camille Watson, Rose Murphy,  
Michael Anne Lepole, Gloria Fortier,  
Paula Garland, Stacy Otto, Lori Davidson

Invitees: Maren C., Robert S., Christine G.,  
Louise N., Tola D., Richard E., Elizabeth  
M., Tonya B.

The meeting commenced at 12:07 p.m.

Sharon O'Hare: The meeting will not run as long as last week. This will be a review of the accomplishments we've done to date. We've talked about the five year strategic plan presented at our first meeting. The second meeting we went over the Public Housing Admin Plan. Lori is going to be presenting the Section 8 Program Admin Plan. I'm going to wrap up with facilitating discussion among the Interim Advisory Board members talking about our proposed preference system and also the no cash policy. And we have to do a resolution on the no cash policy. Your function as a Board is to convey a set of resolutions to the Staff and the Board of Commissioners. We want to get into what statement you might want to make to the Board about the issues we have been bringing up. We want to review the homework last week on QHWRA as part of the Agency plan.

Lori Davidson: We are in the process of rewriting our Admin Plan and the reason is that HUD just came out with all these new rules. They were finalized supposedly starting October 1, 1999, and then we had to revise them a little bit more and revised again a little bit more and this is what we ended up. This is in addition to all the rules that we had to abide by before. So we're trying to incorporate all these changes into our Admin Plan. This isn't as comprehensive in terms of its actual effect on the tenants, because we don't need tenant screening for the Section 8 program. The landlords are responsible for the tenant screening. So that whole landlord act that Public Housing deals with doesn't apply here. We follow the same fair housing/ADA regulations. We have a lot of rules in the way this program is implemented, but the landlord is responsible for credit checks and rental references and any of those things that tell them whether you're a good renter or not and whether they want to rent to you. So I'm just going to hit some highlights. This is the actual Admin Plan itself, in its draft stage. There are still a lot of places where we're making decisions and I need to meet with the Executive Director about them and it goes to the Board then. Most of them are not changed that we have a choice about. There are things that HUD said you must do, and where they give us a little leeway and say how many days are you going to give them to pay back the money that you owe you and how are you going to do that. Are going to levy through a retaining agreement, are you going to deduct it from their next landlord payment so they have to pay more

in rent. Those kinds of things that they give us that we can decide on. We can set policies. Most of the changes have to do with the timing of various procedures that we go through in the Section 8 Program. How we deal with landlords.

There are a few places where there have been some pretty significant changes.

One of them we talked about last week was the income targeting. The Section 8 Program, Congress has said the Section 8 Program is where we think you ought to house the lowest income people, and we know that because they said 75% of all new admissions have to be at 30% median income or below. In Public Housing, only 40% of the new admissions have to be at that income level. So we know they're encouraging us to use the Section 8 Program to house the low income people.

Sharon O'Hare: May I ask why they're doing that?

Lori Davidson: We are under the impression the reason they want to do that is because they want to reduce the amount of subsidy that is paid to the Public Housing Program. And the way you reduce the subsidy is you increase the amount of rent you're collecting from the tenants in Public Housing. Why it matters whether they're taking out of this pot or that pot, I don't know.

Rose Murphy: I also think it's for deconcentration of the very low income.

Lori Davidson: And that's also the case. They're working on deconcentration of all areas.

Sharon O'Hare: So the concentration over the years as having the lowest income people in Public Housing and they're trying to make that change.

Rose Murphy: I think they were pretty even prior to the changes.

Lori Davidson: And also using the Section 8 Program to encourage lower income people to be dispersed throughout this community and not concentrated in one area.

Sharon O'Hare: Which for us is sort of scary because our Public Housing we're looking at it as if our Public Housing was in a big project.

Lori Davidson: That's because most Public Housing is. We don't fall in that category. We already have very dispersed Public Housing. We will still be treating it as if we had the project too. Besides the income targeting, the other piece that they put into place is how we're going to target under this rule. This is the most difficult thing for us to administer as well as for our tenants. I think it would be wise to go this calculation. Congress said you must admit 75% of all your new admissions with a gross income must be 30% of median or below. So it's the lowest income group that you can have. Then they said but we will not allow any participant to pay more than 40% of their adjusted gross income toward the rent. Your share of rent and utilities cannot be more than 40% of your adjusted gross income. There are no exceptions and they're not allowed to go even a dollar over that 40%. It's a very flat rule. So, for example, if your adjusted gross income is \$800 a month, 30% of that is \$240. That's what your portion of the rent would be. Congress said under no circumstance can you pay more than \$320 a month for rent and utilities. We can't subsidize you for more than that amount of

money. So if you find a unit and if rent and utilities for that unit are \$860, the payment standard is \$722, that means \$128 you're going to have to pay out of your own pocket. Your share is \$240, that's 30%, but the difference between the payment standard and the rent and utilities is \$358 a month. That's more than \$320. You need to find a place that's more in the range of say \$750 for your rent and utilities. Then the difference between the rent and utilities and the payment standard is \$28.00. So you pay the \$240 plus the \$28 that's \$268.

Camille Watson: What happens if your under the 40% and the income is decreasing. Is that okay?

Lori Davidson: If you move from that place, there's a fine. There's a new lease. If the owner increases the rent it doesn't matter.

Camille Watson: So it's not considered a new lease at the end of your one year lease and your landlord raises the rent.

Lori Davidson: A renewal doesn't apply to it. As long as you don't move, and it's the same place this does not apply. But if you move to a new place then it does apply.

Sharon O'Hare: When you move to another housing then you have to apply that 40%. That's the trigger for the 40%.

Maren C.: Is it HUD that sets the payment standards?

Lori Davidson: Yes. You have to recognize these are fair market rents. Most payment standards are set at the fair market rent. Congress now says you can change the payment standards. You don't have to lease at fair market rent. You can go 10% below or you can go 10% above it, but that's all. If you rent anything outside that 90 to 110%, you have to structure to make them come out.

So 110% of the fair market rent, we can do that and our Board did that. We have a payment standard that is 10% more than fair market rent.

Rose Murphy: At the fair market rate of \$649 so we've increased to that amount, and that's the highest we can go.

Lori Davidson: The fair market rent is changed once a year and a new standard analysis of what people are paying in terms of their rent, and if it's more than the fair market rent, then we look at it at the payment standards as our analysis of that fair market rent.

Sharon O'Hare: Is that fair market rent set for a specific area, like say the Missoula urban area?

Lori Davidson: Yes.

Sharon O'Hare: The theory is, HUD says you should be able to rent at a fair market rent, but the reality is the lowest income.

Lori Davidson: They have a formula that they use and based on the average two bedroom rent.

Maren C.: So this actually could promote resident deconcentration. You look

at the areas of Missoula where you could get a two bedroom apartment for that much money.

Lori Davidson: And we are complaining loudly and often about the 40% rule. We think it's patently unfair and it does not fit every community and ours definitely, and it does not serve their purpose. We argue against this all the time.

Gloria Fortier: The benefit to this, people aren't getting in over their heads.

Lori Davidson: That's the only benefit. But you can work around it on a case-by-case basis. We've not actually tried that yet, but we know that there are times when you can apply to HUD, if you have a particularly large family, say they've got six kids and they need a five or six bedroom place and there is nothing available that fits this formula. We can call HUD and ask them what to do or call for an exception and ask them if they will allow us to raise the payment standard in this individual case, so these people can find a place to live. That's what they did at HR&C, there was a different program called a Section 8 Certificate where this is the case. In fact, you couldn't rent a place that was more than the payment standard period, at all. So they were running into the place where they couldn't find a place and they would call HUD and ask for a Certificate. There are ways that we can deal with this on a case-by-case basis, but it's difficult.

Maren C.: How do you get to the AGI?

Lori Davidson: Adjusted gross income?

Maren C.: What are you taking out of it to get it to be adjusted?

Lori Davidson: There are some standard deductions that HUD allows us to make, and they are \$480 a year for each dependent child, \$400 for a head of household or a spouse, if elderly or disabled, out-of-pocket medical expenses. There's a certain percentage of those we can deduct. Child care expenses. If your child care allows you to work or to go to school. Those can be deducted.

Maren C.: We were just curious what the exemptions were to get there.

Lori Davidson: And the catch 22 in all of this, for a person who has a lot of out-of-pocket medical expenses, it effects the amount of rent they can pay.

Maren C.: The more expenses you have, the less you can pay.

Lori Davidson: So it's really, really difficult.

Maren C.: So you can't find a place to live.

Rose Murphy: It does only for elderly or disabled households.

Lori Davidson: Medical expense only applies if it's head of household or a spouse, the elderly and disabled. One of the other things that our Board changed was there are things that we call certain types of houses, like group homes and single room only. The Housing Authority has the option to subsidize

those kinds of housing or not. You must for all those kinds of housing when the person is requesting it as a reasonable accommodation. So those are always there for someone needs it as a reasonable accommodation. Our Board has chosen to use one special housing type and that is a person who owns a trailer but rents the space and the cost of the space that they're renting and utilities is more than 50% of their income. This is a change that went into effect last month. We had never subsidized households that owned their own trailer before. We had a special request from an elderly person who owned their trailer, it's a very old trailer, and this elderly person lived there for a very long time and it was her home. The rental space was going up so high that she could no longer afford to pay rent on the trailer. So they came to our Board and asked if we could subsidize the rent of the space. And that is allowed by HUD, but we had to set a new policy. So that has been a change in our Admin Plan. We'll subsidize the trailer space and utilities if it's more than 50% of your income. Most of the other types of housing really don't lie in that area. We don't have any cooperative housing apartments or condos that I'm aware of. Most of them are privately owned and we don't have that kind of housing here in town. But that is one type where we had the request. So that's good information for you to know that there are special circumstances and you want to come to our Board and talk to them, they're always available for that. You can make a special request.

The other change that they made is called a final conforming rule for all these changes I'm talking about and they way that we run this program. They have said you must terminate or deny admission to a household who has been evicted from a Section 8 Program for a serious violation. Our policy used to be that you could be evicted twice without losing your voucher subsidy. It didn't matter what it was for, but you could be evicted two times, and rent a third place and still be subsidized. HUD now says--Congress has now said, no way. If you're evicted for a serious violation, under the Section 8 Program, we're not going to put up with any longer. Their justification for that is, this provision indicates that HUD will not reward serious violations such as behavior that threatens other residents or the safety or maintenance of the premises. Furthermore, this policy will address the complaints that some families have collected Section 8 benefits even after they had caused extensive damage or incurred a large unpaid rent debt. This holds the whole family accountable for actions by family members should increase performance for participation and provide housing opportunities for low income families in an unfavorable neighborhood. So they're responding to complaints from landlords and complaints from participants who said they had \$2,000 worth of damage and they left it and if you subsidize them they can go rent someplace else and leave with \$2,000 worth of damage. I'm not going to rent to Section 8 families. So this was Congress' response, we're not going to subsidize you if you're evicted for a serious violation.

Maren C.: Are they evicted like you actually went through an eviction procedure, went to court, or is it just a lease termination?

Lori Davidson: The court procedure is for possession of the unit. If it is a three day eviction or a five day eviction notice for damages or for rent.

Maren C.: If they say okay I'll leave, don't give me a notice.

Lori Davidson: You're voluntarily leaving. If you have to go to court, you're refusing to be evicted and we want possession of that unit so we're

going to court to take possession.

Maren C.: What if they just say I'll leave.

Lori Davidson: That's an eviction. It has to be a serious lease violation. It's not just repeated violations. It has to be serious. You have to cause serious damage to the property. It has to be unpaid rent. HUD takes very seriously unpaid rent. That is one of the things they flat out say. We can evict under Public Housing or Section 8, for unpaid rent. That's what keeps the amount that they have to subsidize down. And they use that as a tool to try and hold costs in both of these programs. So they take very seriously those who don't pay the rent.

Maren C.: I've never been evicted so I was just curious.

Rose Murphy: It was a clarification that we needed, though, because we do that ourselves.

Lori Davidson: It's a very small number, and we try and avoid going in whenever we can. It's not something we like to do.

Rose Murphy: Landlords don't like to do it either. It costs them money for turnover. So they'd rather have you work out your problem and get caught up.

Lori Davidson: So those are the highlights. The rest of the changes are pretty much apply to the kind of paperwork that we do. If you have any questions, this is the time to ask about them.

Camille Watson: I am confused. Is this a new law for Section 8, that if you have definitely been evicted from Section 8 before, we don't have to rent to you for the rest of your life?

Lori Davidson: Right we can't subsidize with Section 8 vouchers.

Camille Watson: So if you're evicted under Section 8 and you're 50 years old, when you're 55 you can get a voucher.

Lori Davidson: That's right.

Camille Watson: That is super serious.

Lori Davidson: It's very serious and it's a strict law.

Rose Murphy: It is something we need to make sure we're informing people about too.

Lori Davidson: When they originally wrote this law in the proposed rule, they said if you've been evicted from any federally subsidized housing, we are not allowed to subsidize in any kind of other federal housing for five years. But they changed that. That was based on comments that they got. When a new rule comes out there is a comment period just like there is when we put out a rule here.

Tola D.: That's for anybody living in the house and not a household member? Somebody married somebody else that has lost theirs, they could not apply?



Lori Davidson: That's right. If you've been evicted from any other kind of federal housing program, the Housing Authority can allow it if there are extenuating circumstances. If there has been a change in your household composition, or if you've gone through some kind of rehab, or you're no longer married to the person who was beating you up or who was pounding holes in the walls, or if you've got a job now and can pay the rent. If you've been evicted from some other kind of housing, say Public Housing or tax credit project, something like Grandview Place, we can still rent to you. This applies to the Section 8 voucher eviction.

????: Is that the kind of decision that is taken to the Board for approval, or is that something that we can make individually by the person?

Lori Davidson: It's made first by the housing specialist. However, the applicant or participant always has access to a grievance procedure. So if you disagree with what the housing specialist's decision is, you can request in writing an informal review, and then you'll probably meet with somebody else from the Housing Authority or an outside person. It will not be the person who made the original decision. There will be a second person who will listen to both sides of the story and makes a decision. If you still disagree with that, there's access to a formal grievance procedure where there is a hearing officer that comes in from outside, and as always, you have access to the courts as well. A decision by a housing specialist is never necessarily final. There are some things that they can make a decision about that you cannot grieve. For example, if you've gone for six months without needing a subsidy, we have to terminate your voucher. That's a decision that the housing specialist puts into place at the end of the six month period and you can't grieve that. There are certain things you can grieve and there are other things that you can't. Most things, though, in places where it's a discretionary power on the part of the staff person at the Housing Authority, you can grieve it, and then you have access to a second opinion, and there are further remedies after that if you're still not happy with the decision.

Camille Watson: That's in Section 8 too?

Lori Davidson: Yes.

Camille Watson: Just like Public Housing. But as the applicant you get only one informal hearing.

Lori Davidson: While the procedure is in process, no action is taken by the Housing Authority.

Lori Davidson: So you exhaust administrative remedies before judicial review.

Maren C.: What if the eviction is disputed. I've had people call me, tenants, and say the landlord says I did this and this and this, and I didn't do it, and the neighbor did it.

Lori Davidson: That's when you go to court.

Maren C.: You might have some unscrupulous landlords that just basically don't like the person. Would you do any sort of investigation if the tenant said I didn't do any of these things, or would you just say you're out, and you have to file a grievance?

Rose Murphy: That would depend on how that person was doing the grievance.

Lori Davidson: Your subsidy would not stop until the matter was settled, whether it's an administrative review or judicial, depending on how far you want to go with it.

Maren C.: But even so, let's say the person did leave that particular unit, because the landlord said I want you out of here, technically that's an eviction. But there might have been a dispute about the eviction, so would then kick in you can no longer receive any Section 8 assistance?

Lori Davidson: My interpretation of the way it is written this law, it's pretty black and white. If you were living in a house and the landlord ended up with \$3,000 worth of damage they had to fix, somebody in your house did it, or you a person that you allowed into your house did the damage, otherwise there's going to be a police report, some type of vandalism report made, and in that case, you probably wouldn't get assistance. This doesn't kick in unless there is a pretty big thing and probably costs the landlord or the Housing Authority a lot of money.

Maren C.: What are landlord incentives, if any, to participate in the Section 8 Program?

Rose Murphy: We don't allow unauthorized people to live in the unit. We do safety inspections if the landlord requests.

Maren C.: There used to be a tax exemption. That is no longer?

Lori Davidson: No.

Maren C.: My next question is, I used to know this and I don't know why I don't know it any more, but the construction of the families. Are you still limiting that to a blood relative or by marriage?

Lori Davidson: Under fair housing laws, the family is anybody basically that are living together.

Camille Watson: It was a stupid ordinance a couple of years ago.

Lori Davidson: A family is anybody who choose to live together.

Maren C.: Are you talking about the ordinance that said no more than two people related by blood. The Supreme Court has upheld ordinances like that. The United States Supreme Court said you could do that. The Montana Constitution had more protection in it, so they said no way can you do that to us. So anybody that wants to live together can come to you and say, we're a family, count all of our income. And we're not going to tell you that our parents are sending us money to pay our rent.

Camille Watson: That doesn't happen very often.

Sharon O'Hare: That is a real scenario. That could happen.

Gloria Fortier: If a student has a parent that sends them money once a year as a Christmas present or something, they don't have to declare it as income. If they have a savings account of \$30,000 it's 40% of that.

Lori Davidson: Then we count the income from the asset.

Maren C.: How do people live if they're not working. They simply have zero income. How does that work in your 40%.

Rose Murphy: They must rent within the payment standards. The gross rent, which means utility and rent.

Rose C.: So they can't pay more than 40% or zero.

Lori Davidson: Correct. They have to meet our payment standards. They cannot pay any extra. So if they have zero income, they pay \$50 in rent.

Maren C.: How often does that happen?

Lori Davidson: With students, that happens a lot.

Maren C.: To me this is not the intention of providing subsidized housing.

Lori Davidson: That's one of the reasons that when we're looking at this new preference system, which Sharon is going to sum up here when I'm done. One of the reasons that we want to say that single people are at the bottom of the list, we still accept their applications but they will be housed last, except for the elderly and disabled, for that very reason. There are a lot of students here who could apply for housing as a single person, they have zero income, so we're paying the full subsidy for them all the time.

Maren C.: So one person can be a family with no disability, no elderly, no problems. I could see if you had a group of students who got on assistance or had been victims of domestic violence, or were disabled. Or had some problem prior to becoming a student and wanting to be a student to try to get out of the system. But just a group of students? This doesn't make sense to me.

Camille Watson: That does not happen very often. A group of students, mostly because look at the hoops that you have to jump through. Reporting their whole life story. They put up with a lot, and it's not a breeze.

Lori Davidson: Students have a lot of other options. One way we do have available that we can deal with that a little bit is to say single people without elderly or disabled will fall to the bottom of the list.

Sharon O'Hare: But that's only if they want a one bedroom. If you have five people who are a family who get five bedrooms.

Lori Davidson: But they're also going on the waiting list, and if we make it a first come, first served waiting list, it may be they won't be housed for another year.

Sharon O'Hare: But the way it is now with the preferences, the way it is now, if they qualify for a five bedroom house, or a four bedroom, the waiting time for a four bedroom house is much shorter than the waiting time for a one or two bedroom. Even the proposed change in the preference system wouldn't alter the fact that you're going to follow parallel tracks with waiting, depending on whether you're waiting for a one bedroom or waiting for a four bedroom. So

it's still going to be first come, first served.

Lori Davidson: That would be in Public Housing and not Section 8.

Maren C.: So a group of students could potentially get housed before a lot of other people in the scenario you're using.

Lori Davidson: In Public Housing, that's right. Don't forget they also have to go through the screening process. They have to prove rental references. They have a background check. On the Section 8 waiting list, bedroom size is not considered.

Sharon O'Hare: Who is the head of the household?

Camille Watson: They have to choose the head of household. And we have a background check, police checks.

Lori Davidson: If they choose a head of household and that person leaves, they have to have someone else take the place and become a new head of household, and if that person decides to leave the group, they take our voucher with them.

Rose Murphy: And one thing discourages that. All of those working with the people that are at Parkside, they have to choose the head of the household. That head of the household is financially responsible to report all information to the Housing Authority and if it's found they're under-reported, that head of the household is responsible for any over payment.

Lori Davidson: Which means they have to pay it back to the Housing Authority.

Maren C.: The definition of family applies in both Public Housing and Section 8.

Lori Davidson: Yes. And it's about as liberal as you can get.

Sharon O'Hare: Lori, in terms of these changes to Section 8, has the Board of Commissioners reviewed that.

Lori Davidson: They have not reviewed the changes. In the Section 8 Admin Plan, there isn't a lot of places where we can get the comment, because most of it is set by law. We might not like it, but it's there. We do have discretion in terms of the preferences and a couple of other places. The changes that Camille will be talking about too, most of them are those that we don't have a choice about. The one thing that I think a lot of people don't realize about subsidized housing, it comes with a whole lot of rules and regulations. And it works both ways, it's to the tenant's benefit or the participant's benefit in many, many cases. We cannot evict without cause or trying to lease without cause. A landlord can give them 30 days notice to pay rent and we cannot do that. So tenants and participants have a lot of protection in our programs, but they also have a whole lot of rules that they have to follow that we don't have in the private sector.

Elizabeth M.: I can speak to that. When we first moved into Public Housing, and initially I felt a little strangled by all the rules and then I came to appreciate why there was a lot of rules.

Lori Davidson: It can be very intrusive, having an inspector come to your house all the day. Having to tell us about any household change that you have.

Maren C.: What does the background check involve? Not that I oppose it so far.

Lori Davidson: In the Section 8 Program it's encouraged but not required, but is in the Public Housing.

Maren C.: What would knock someone out for a criminal?

Lori Davidson: Violent or drug related crime in the last three years. Even under those circumstances, we are allowed to consider mitigating circumstances. If the person in your household is no longer living in the household. We are allowed to consider each case on an individual basis.

Maren C.: What if you're picked up for a traffic violation and you had like marijuana on you and then you get possession, is that enough?

Lori Davidson: Yes.

Maren C.: And then you go through rehab and you stay clean.

Lori Davidson: Then we would probably let you in.

Maren C.: If something is really, really old--

Lori Davidson: If it's over three years, we don't consider it. There are exceptions to that. The first mandatory denial or termination of your assistance is if you've been arrested or convicted of manufacturing or producing methamphetamine. You are barred from housing of any kind in federal subsidizing.

Maren C.: What if you're making crack, isn't that just as bad.

Camille Watson: This is really different.

Lori Davidson: It's really dangerous.

Elizabeth M.: I would just like to say that in Public Housing, there is wonderful help in terms of if something breaks. I called Housing and if somebody is there I apologize for the mess, it's like having a silent husband.

Gloria Fortier: We refer to the maintenance crew that way too.

Lori Davidson: Manufacturing and producing methamphetamine bans you from housing forever. The other thing is if you are a registered sex offender under a state registration program, you're also barred from housing.

Rose Murphy: We're finding that on our background checks, and some states have registration programs and some don't.

Lori Davidson: Those two are a part of the Quality Housing Work Responsibility Act so those are two mandatory denials.

????: What happens when you get fired? You're working and then you get fired?

Lori Davidson: You come in for a recertification and the amount of rent that you pay changes. Anytime your income decreases, you should let the housing specialist or the Public Housing manager know right away, because you get an increase the next month's rent. So that happens anytime you have an income increase too. Whenever that happens the amount of rent you pay changes the very next month.

Rose Murphy: But you have to come in before the 25th of the month for a recertification.

Lori Davidson: You have to let us know about it.

Sharon O'Hare: Let's take a short pop break. (stopped at 12:55 p.m. and restarted at 12:56 p.m.)

Sharon O'Hare: The agenda is flexible. Let's review the revised preference system and then if there is any time left over we can start talking about the Public Housing stuff.

Lori Davidson: A family under HUD's definition is anybody, including singles. So one person can be considered, under HUD, as a family. What we're saying here is, that's true except for the single people who are not elderly or disabled, we think they should be at the bottom of the list. They're the least critical to be housed. Elderly, disabled and families of two or more persons, we would prefer to be able to house them over a single person who has no disability and who is not elderly. That's open for discussion. We can make this first come, first served and include singles in it.

Maren C.: Is this just for Public Housing or also Section 8?

Lori Davidson: It's for all the programs.

Sharon O'Hare: So in having the orientation that you have with the applicant, it would be fairly easy to determine at that point if they get a one point preference, perhaps having more than one person in the household, or could be elderly or could be disabled. If they are elderly and disabled still only get one point.

Lori Davidson: That is correct.

Sharon O'Hare: So of all the people that walk through our door, we take them and they either get one preference point, or get zero preference point. If you're Section 8, if you apply for the Section 8 Program, and you're going onto the waiting list, you have a waiting list that is sorted first by where you have one preference point or zero preference point. So all the ones will be at the top and the zeros fall out. Then the secondary score would be based when they came through the door or when they submitted the application. So in that case, either the zero preference point person comes in three years ago and we have a person with one preference point that came in yesterday, they're going to have priority over the person that came in three years ago. Is that how that works?

Lori Davidson: Yes.

Sharon O'Hare: So pretty simple to explain. It's difficult for our applicants and clients to understand. This is the point where the Interim Advisory Board begins to discuss it. If you want to take an opportunity to make a statement to the Board of Commissioners or to Staff, in terms of what you think about this. We can do a simple resolution or show support or if this is a good idea or a lousy idea. We had a lot of discussion last time about the homeless preference. My memory is a conversation evolved where you wanted the Housing Authority to address homelessness by doing more partnership with those folks who are in emergency housing and providing transitional housing. The Missoula Housing Authority is not for emergency housing or transitional. We're more for long-term residency. Am I capturing what was said. A homeless preference is not the way to address the problem, but the way the Housing Authority would address the problem is partnering with YWCA, the Poverello Center, in terms of helping out and providing more of that kind of housing. Is that fair?

Maren C.: I think that's fair. I think that's how we ended, that the Housing Authority wasn't doing emergency housing and transitional housing might be more appropriate in situations where a person may not have a successful tenancy and they need to gather some skills prior to being able to do that. What about people who come out of like SHARE House? Is that considered transitional housing?

Richard S.: It is my understanding that the one that has been and deals with the homeless problem, is through the social work office at the Salvation Army. It is a volunteer program, but without Missoula Housing Authority's help. I'm talking about what is currently being done, maybe not to the extent it should be, but it's currently in the community.

Sharon O'Hare: We're actually already doing it. It's kind of a behind scenes. What I heard the group saying, is to have a five year plan that the Board doesn't want to see the Housing Authority become the principal provider, not to in any way become the primary provider for transitional housing, but instead our expertise with the housing program to work with other social agencies.

????: And you'd be willing only to work with the homeless that are not already being served by Poverello or some other agency. The scenario I'm thinking of is someone who lost their job, can't pay their rent, and takes their kids and is living in their car. Because they have a family they would be able to get help through the Poverello Center, but they would also be able to work with you directly.

Camille Watson: They would have no preference. There would be no specific preference given to that family.

Sharon O'Hare: They would get a one point preference.

Christine G.: In order to get a preference for homelessness, I'm hearing you talk about, it would have to be persons who are served by these agencies.

Sharon O'Hare: No, I'm saying there would be no preference for homelessness. The way we would propose now, the only preference you get is either you're

one of these three things or they're not. Then you go on a first come, first served basis. I'm saying it says in this strategic plan, what we want to do is work in partnership with the Poverello Center or the Joseph Center. The Joseph Center is the emergency shelter for families. We would say work in partnership with them. What we can do is, I'm a grant writer, and help the Joseph Center get more grants to sustain their emergency housing. We would be working in that way. We wouldn't own the housing but would help in the community to sustain what is available.

Maren C.: And that's the situation that Christine described. A person loses their job with kids in the car. It's likely that that person is going to become re-employed and perhaps over income. I'm not saying right away, but I'm saying within six months, so you put them in Public Housing and then they're over income and then they move out. What I think you're talking about and what we talked about last week is some sort of transitional place to house that family. It's a tricky situation. Do you want to create a dependency and they say this is pretty good, maybe I don't have to work. Or, does it do that. I don't know the psychological effects of that. I don't know. They're not disabled, that person was previously employed, so it's going to be a short tenancy in Public Housing.

Elizabeth M.: I think another situation is where you have a single parent who has children---it's not fair to say they would be back working in six months. As a single mom with children, I can't imagine not having a home---in getting help in a relatively brief period of time. Getting into Public Housing is not that instantaneous. For some people maybe it is, but I think those are slightly narrow assumptions.

Maren C.: That's a good point and maybe my assumptions were narrow, especially like if the mill closes and you're skills are particular to that, you're going to need some transitional skills.

Tola D.: My job is finding people jobs, and I have had homeless with a Masters Degree, but very few of them are capable and do not have the capacity to do high tech computer. To find him a job is really, really difficult.

Richard S.: I agree with what Elizabeth said about single parents. You get the day care and everything else, and this is my own personal belief, and I'm a single homeless person with a lot of experience. A single homeless person without the Joseph House or Poverello, I don't know where I would be today. The work that I've done I don't think that people understand or even know the extent of the homeless of families in this valley. How many people are camped out in the woods with their children. How small Joseph House is and the economy and how many people going in to the Poverello Center or go someplace else because of problems like that. I like your idea of not necessarily making it a policy of this agency to helping people, but places like Poverello build a house and start up here in Missoula, because I have homeless families come in to me that can't find a job and I'm talking about a young couple with three kids that were camped out in the woods and they couldn't get in Joseph House. Once you're in there you can stay until things get better, so the turnover is very, very slow.

Sharon O'Hare: Is Joseph House transitional housing or emergency?

Richard S.: Emergency and family housing.



Sharon O'Hare: How long can you stay there?

Richard S.: I think it's up to three months.

Lori Davidson: I think that every one of the situations that you guys are describing in terms of people needing housing, are absolutely correct. There is a critical need in every single one of those situations. Homeless people, elderly, disabled, people on fixed income, single parent with kids, people who are living in their cars. Where I think the Housing Authority is looking at that is, there is no way to say that one of those groups is more critical than the other group. They all need help and considering that we have a limited ability to help people, what's the fairest way that we can provide that help to people?

Tola D.: You have to keep in mind that you're not a business and running in income, there's nothing for anybody. If you're helping all these people are not able to contribute a little bit, then all of the money is gone and there's no program for anyone.

Elizabeth M.: I would like to suggest as a group that we back the new preferences, but make it sort of conditional agreement that they use the new preferences, and that as a group we accept as long with the appropriate clause that this issue, that the Housing Authority make the stand and addresses that.

Sharon O'Hare: I would say that I know the Housing Authority's strategic plan addresses the need for more. Help create more transitional housing.

Lori Davidson: Also on page 3--

Elizabeth M.: If you wanted to do it as a resolution--

Maren C.: I want to say one more thing before we get there. I am very sympathetic to the homeless problem and I worked with a lot of homeless people in my previous employment and tried desperately to find housing. The point is, what purpose is the Housing Authority serving in terms of providing housing to low income people in this community. Homelessness as a preference--we discussed last week and they pointed out the problem they're finding in that and the problem created by just getting some points by moving up on the list. I think with the preference points of the two or more persons, basically you're already giving any family, homeless or paying rent that they can't afford and on the verge of being homeless, they're already getting a preference point. Is the Housing Authority going to be in the business of providing emergency housing or are they going to be in the business--is every homeless person or family destined to be in a low income situation forever, for a long period of time, for a year. Those are also assumptions that we make here, and definitely the need for housing homeless people is there because there's not going to be a chance of any kind of change in that person's life unless they have a place to live. But, who best serves that purpose. I think in this goal, this is a separate thing from preferences. Helping create transitional housing and helping to find community resources to do that is not the same thing as providing a preference for a homeless family.

I think we need to be real clear about what is the Housing Authority's purpose and what is the Housing Authority's commitment. How is the Housing Authority going to help serve the community's purpose in the provision of

housing for homelessness.

Sharon O'Hare: Okay. Elizabeth, would you restate what you thought.

Elizabeth M.: If the group as a part of the process we all thought we had addressed the reality of the seriousness of the needs of the homeless--and it seems at this juncture we say this as a stand or not take a stand. My suggestion was something in the middle the transitional backing of this, that the transitional is very critical. That the Housing Authority not put that as a part of their main focus.

Maren C.: There is one other issue in the preferences and I hate to do this because I told myself I was going to be quiet, and I just can't do it. In this green thing in checking through the first page, second column, it says "No federally mandated preferences are in effect any longer." However, the law includes a statement that says, "Since the Congress has given admission preference to providers to victims of domestic violence." I'm wondering how the Housing Authority is dealing with that statement. It's not a mandate, you don't have to do it, but it's the legislative intent.

Sharon O'Hare: It's not one in these proposed preferences, except that if you are any family you get one point. I think where the Housing Authority Board of Commissioners is directing that, is back to the established policy for affordable and transitional housing. That's where we're talking about working with the YWCA with vouchers that are restricted to victims of domestic violence. That's the kind of direction that we're creating for Section 8 voucher. That's the kind of way we're looking at addressing it rather than putting it in as a preference. There are already as part of the YWCA transitional housing for victims of domestic violence.

Maren C.: I just read that and I thought--it's a statement of legislative intent. It's not a mandate. Clearly, you can ignore it if you want, but we had some discussion here last week of this situation with domestic violence and the obvious necessity to return to the abuser if you had no other place to go. These strategic plan goals, are these listed in order of priority or are they just kind of random.

Sharon O'Hare: No. There are six goals and then the goals for the five year plan, and under goal are the guiding principles, and specific action plan for the year 2000, and then we'll be discussing 2001 and 2005. The one year Agency action planning and there's an action plan for 2001, 2005.

Maren C.: And that's where the transitional housing steps in, in 2001?

Sharon O'Hare: No, actually not. Section 8 voucher rental assistance program activities we'll put out in the year 2000. We're intending to move on that right away. We will continue this year to move in that direction as our advocacy role in the community is to help with that. My own personal feeling is that it would be helpful for you folks to make a statement that we can carry to the Board, and, in fact, it would wonderful to have you all or whomever wants to, attend the next Board of Commissioners meeting. This is new to have an Interim Advisory Board. They need to know that you've heard it and they will also get a sense of the quality of the discussions. You've got a voice and you can speak if you want.

Lori Davidson: It's the third Tuesday of every month at 1:00 o'clock here. We serve lunch starting at 12:30. Lunch at 12:30 and the meeting at 1:00. They usually run one and a half to two hours.

Tola D.: I have a comment on the proposed new admissions preference. The only people that aren't going to qualify for the one point are single people. Is anything more than that single is either a family or they're disabled or they're elderly. I think you have the potential of two points, one point or zero. Giving a maximum of two points say if they're a disabled head of household with a family. One point for disabled, elderly or family with disabled to give two points.

Sharon O'Hare: If you were a family and had a disabled family member or disabled head of household.

Tola D.: I would make it instead of three points, two points. One for each category.

Sharon O'Hare: You would get a maximum of three points out of each category. I'm sorry, it would be two points.

Richard S.: In a case like that to equal that, to make an elderly couple that is doing just fine ahead of somebody that is disabled that's in a wheelchair, that's wheelchair bound and can't do anything by themselves.

Camille Watson: That can get real confusing. First of all, it's not determinable in each respective class. You can't take a protected class and discriminate against a family. You can't put elderly or disabled above them. If you are giving the family a preference point are you discriminating against a single person?

Maren C.: That was my question too. A single person has no protected status at all. I would have to check under Montana, but a single, non-disabled person, unless the discrimination would be based on a certain classification which would be race, national origin, illegitimacy, I don't think that's what you're doing here. I think that age is a quasi-suspect classification, so if you're discriminating against a person by age then it has to be serving an important government interest.

Camille Watson: A marital status would be discriminating against someone.

Maren C.: That's not a suspect classification again under the Constitution. It would be probably a quasi-suspect. Anything that's not in those two categories, quasi-suspect or suspect, basically you can do anything you want because then it's a rational basis connection which is easily--I don't know what the Fair Housing laws of Montana have. I have not looked at them specifically. And also this would be in compliance with Montana. They might not be, but as far as I know, unless Fair Housing laws say you can't discriminate against a single person, there's no protected class.

Christine G.: A single person is still considered a family and they can still suffer terrible hardship that would cause them to fall under the income guidelines.

Sharon O'Hare: According to this a single person, a single person is defined

as a family, a single person would not be considered a family. That's what this preference is going to say.

Christine G.: That would be a major departure from what the standard is now. I'm a single person and I'm considered a family.

Maren C.: You would be considered a family, but you wouldn't be given a preference point. You're still family.

Camille Watson: My thinking is here is if we were to take the 2 point, 1 point, 0 point, you can get into trouble if you have head of household being disabled and there's more than head of household, these are all protected classes.

Tola D.: But it's an essential way of choosing who gets housing first.

Richard E.: But it comes down to date and time of application, so you would have three 1 pointers, and you take the one on the basis of who signed the application first.

Robert S.: Disabled people don't want to be discriminated against. I think everybody should be categorized. They don't want to be categorized or discriminated against, then the lack of discriminating them puts somebody else into a discriminating factor.

Sharon O'Hare: If you need to go at 1:30, can go, and those that can stay until 2:00 can do so. The other thing is that I have the sense that we're not going to come to a resolution on this so we can carry this forward to next week.

Maren C.: I can't make a meeting next week, but you'll have a quicker meeting that way.

Robert S.: I can understand the need and fairness for people with disability, but you're putting one ahead of another.

Maren C.: You would have to look at the policy that you have a Housing Authority that says we're going to house an able-bodied, 25-year-old woman before we house mentally ill, 25-year-old man, I think the community is going to have something to say about that.

Camille Watson: HUD says that you will serve elderly and disabled first.

Maren C.: Politically you're committing suicide if you do that in the community.

Camille Watson: If we say first come, first served.

Maren C.: Exactly.

Richard E.: That was the intent of doing the preference system by number, and I think if you look in the community, there's other things in the community that deal with that and others. That's not the purpose of this organization.

What I'm saying is, we're not the only business in town that deals with the mentally ill. And to me it's more thorough to go through these are the

preferences and how do we take them. How do we decide to take things in general. You put in your application first and normally you're looked at first. The first person is going to get the job. A lot of times it's first come, first served. And I'm not saying you look at it everywhere else. There are exceptions to every rule. You're not going to put anything on paper that isn't going to be not able to be argued by anyone who doesn't like the looks of it.

Maren C.: I think you can argue it quite well. I think these preferences are fine. They look at families with children. They look at elderly and disabled. I think it includes the classes of people that Public Housing and the Section 8 Programs are basically created to serve. And I think anybody else they can serve, fine. But I think if you take somebody who is eligible simply because they don't have a job, whether they want a job, don't have a job, I think there are more barriers for employment for people in this situation than there are who are able-bodied.

Christine G.: You're saying that if someone gets assistance, they don't want to work.

Maren C.: No, I'm not. I'm saying there are more barriers to employment. You just simply can't say if a person with a disability goes in to get a job and discloses a disability the employer doesn't want to deal with reasonable accommodations, they can find some excuse for not hiring them, or the person has kids, they need child care and that's expensive. They have kids at home, the kids need to come work, they need to leave work to pick the kid up from school to take him to child care, those are barriers to employment. Elderly, age discrimination is a real things. So is discrimination against disabled in the workplace. It's a real thing.

Sharon O'Hare: So what you're saying is, it's not a level playing field when it comes to employment. We need to find a way to adjust the level playing field. The standard thing doesn't address what Richard points out. If you're a couple, an able-bodied couple with no children, you're going to get a preference over just a single person.

Maren C.: Just say with children in the family.

Tola D.: You would get more points for groups of things. If you had a couple that were able-bodied and you had a disabled mom, that couple, if they got their application in first, is going to get that over the single, disabled mom with kids.

Camille Watson: That's what my concern is. With those three classes up there, those three classes cannot discriminate against each other.

Richard E.: What I was talking about, it is possible to have an elderly couple, so say they get three points--what gets one, two and three points. You could end up with--I'll just go down the list. You already have a single, disabled person right there who is covered right now. If you go the one, two, three point system and you just rate the elderly couple over the single person, one way or another someone is going to get discriminated against.

Sharon O'Hare: Rather than using any preference that we put on this other than first come, first served. By any point system, we are initiating a

preference. We are establishing we are preferring one group--prioritizing our service to these groups over the ones who don't get the preference. Do we want to go to a first come, first served.

Camille Watson: Everybody gets one point, nobody gets discriminated against. The only ones who are going to be discriminated against are the single and apparently you can discriminate against them.

Maren C.: They have a lot of rights, they just don't have any protected status.

Richard E.: It's better to take care of itself. I think I misunderstood you. Tell me if I'm wrong. The elderly and disabled get one point. But if you're family with two people, you get two points. So you have an elderly couple that is just fine and also families get two points, the disabled person by himself gets one point. That's where the discrimination comes in. If you fit in any one of these categories and you're one point, your next preference to being able to get into it is right here by date and time of the application, first come, first served.

Maren C.: And you can look at the Fair Housing and see that it's serving the interest of children is something that the state or locality is a priority, and in that case you could put in the family situation that parents with children. If anything in Fair Housing or in HUD says one of the ideas that we're trying to serve here is children. Then I think you can do that safely. Of course, HUD could be wrong too. You would have some way to say we were doing this based on HUD. It still could get knocked out if someone challenged it. But that would be the only way. Someone would have to challenge it.

Tola D.: For families it is being addressed because of all the new vouchers that went with the FAIM Program.

Maren C.: Those are people who are specifically on FAIM. There might be somebody whose not on FAIM who is still a single mom with kids.

Sharon O'Hare: So back to the preferences we've come up with, if we were in agreement on handling this with households including two or more persons with at least one who is a minor.

Maren C.: You need to check and see if you can do that safely.

Richard E.: So why couldn't you have two categories for family. You would have two in the family or you have two in the family with minors.

Maren C.: The same problem is going to be created. A couple is going to have the same preference status as a mom with kids. That's the problem that Elizabeth has raised or other people have raised. But if anything in the Fair Housing laws of Montana or any policy that has been put out there that you want to serve the interests of children, then I think you could safely do it.

Sharon O'Hare: I think that concern is legitimate, so you don't end up with an able-bodied couple, who is not elderly, not disabled, coming in and getting the same preference points that someone with a disability would get.

Elizabeth M.: If you get someone on the waiting list, the purpose is the same

with someone with preference.

Camille Watson: The whole idea to get away from the preferences is to get away from people feeling gone over because I'm not in transitional housing, I don't get that point.

Elizabeth M.: The purpose is finding a level playing field. (Tape change)

Camille Watson: The categories you have now are so specific.

Elizabeth M.: And these are more general.

Sharon O'Hare: Our current ones can change. How many points you get. We are providing service to couples, an able-bodied couple with no children, we're putting them on the list. They can have access. But these groups have a point.

Maren C.: But an able-bodied couple is going to fall into that third preference. Two or more people.

Sharon O'Hare: That's why I'm proposing and maybe what I was hearing, if they get a family as a preference point, if you haven't got a minor in the household rather than three college kids living together, or two able-bodied persons.

Camille Watson: Can we make up our own description of a family.

Lori Davidson: And I have to ask the question, even if the couple was able-bodied, if they're paying 75% of their income for rent, are they entitled to housing.

Sharon O'Hare: I don't think we're ready to vote on this, and I would suggest that we put it at the beginning of next week's agenda, and you can come to a conclusion as to whether you want to make a statement of compromise.

Maren C.: I think the preferences are fine. If legally you can do it, but she makes a good point. Everybody's circumstances are so different it's hard to just come out and say here, everybody is going to fit into here. You have to decide who you want to serve first. Everybody is going to get served, but who do you intend to serve. I guess I would rather see kids get housed, who needs to get housed as a single parent or two parents.

Tola D.: I think that different numerical numbers for each one, how they came about getting those numbers. That might help us.

Lori Davidson: When HUD first did away with the federal preferences, they gave us suggestions as to who they thought would have priority. And we took those suggestions and they said if they were working families and victims of domestic violence, and people who are in the federal training programs. Those are the people that HUD said we think, because we want to reduce our subsidies and we want to deconcentrate housing, we think you should serve these people first. We tried it and we don't like it. That was again not mandated but encouraged by HUD. They said we want more working families. We want higher income families to be housed. They're given a higher preference. But if you do give working families higher preference, you have to include elderly and disabled in there. They have to be given the same weight as working families.

So if you use the working family preference, the elderly and disabled automatically have to be included at the same weight. And the rest of it was based on Staff and the Board of Commissioners assessments. We put it out for public comment and we met with the other social service agencies. That was the consensus.

Sharon O'Hare: I'm thinking perhaps it would make sense we meet in two weeks. We meet on June 14. We will send out letter with the agenda. Thank you all for coming again. In two weeks we will look at preferences and no cash policy. We have to have an idea of how to handle that so as not to be burdensome to the people. And we can complete the Public Housing stuff.

The meeting was adjourned at 1:50 p.m.



MINUTES

SALE AND DISPOSITION OF PUBLIC HOUSING UNITS

INTERIM BOARD MEETING

June 13, 2000

**IN ATTENDANCE**

Missoula Housing Authority: Sharon O'Hare, Camille Watson, Tom Chapman,  
Lori Davidson, Paula Garland, Gloria Fortier

Invitees: Maren Christensen, Christine Greenwood, Elizabeth  
Marshall, Tola Denny, Louise Noriott

The meeting commenced at 12:15 p.m.

Sharon O'Hare: (After the introductions, proposed final discussion on new preferences.) What Staff is proposing with this is to divide the applicants into two groups. One is the group of folks who are either a household size of two or more, elderly or disabled. If you qualify at least one of those types, you get one preference. If you're not one of those, you are still a household who is not elderly and is with a physical disability, then you get zero preference points. That is what is now before the Board of Commissioners this coming Tuesday, and we really feel a report by this Board would have a recommendation, but if you don't, you certainly don't have to make one.

Lori Davidson: We did check into the issue whether we could require that at least one of those persons be a minor, and we cannot. It's not allowed under fair housing laws. Single, yes, and that's weird.

Tola Denny: They did define the head of a family as one person.

Lori Davidson: They do. The one thing that they have allowed me to do is to house elderly and disabled singles over all other singles. They are still on the waiting list. They can still be housed. They aren't saying we cannot house them. They're just saying that you are allowed to house elderly and disabled singles over all others. They're not, however, allowed to say if you're a two person family one of you has to be a minor. We went to a HUD training last week in Great Falls. The people from the Denver HUD office specifically referred to the elderly, disabled single preference and said where people are retaining this preference is because they live in college towns and they're afraid they are going to be inundated with single college students on their waiting list.

Tola Denny: The elderly, disabled family have more preference.

Lori Davidson: Right. The Staff would still like to go to the elderly and disabled singles over other singles, but not over other families. Those people are all first come, first served. Basically there are two groups. Your a family or you're elderly or disabled, that's a preference point. All treated equally according to when they come on the waiting list, according to date and time of application. The only people who would be considered later are the singles who are not disabled or elderly. And they would have zero

points which would drop them to the bottom of the list.

Maren Christensen: Realistically, how many families of two or more applications do you get where there's not a minor child involved?

Lori Davidson: Very few.

Maren Christensen: So this isn't really going to skew them up that much.

Lori Davidson: We specifically asked our admissions person that question and she said she says very, very few couples.

Maren Christensen: So groups of college students?

Lori Davidson: That's pretty minimal too.

??? : They haven't figured it out yet.

Lori Davidson: Whether they've figured it out yet or not, they're not willing to go through all the hoops or they are a big enough group they can afford to get a really nice place and share the expenses.

Maren Christensen: So primarily this preference point is going to be with a few exceptions still going to serve households with minor children. I think the preference point system personally is the better way to go than first come, first served. The first come, first served just doesn't sit right with me in terms of who is more capable or more able to find housing. I know people have disagreements with that, but I prefer the preference point system simplified. This other thing is a nightmare.

Sharon O'Hare: Yes. There are not so many as there on the blue sheet, but we will give them more sympathy because the Human Resource Council is serving on a first come, first served.

Maren Christensen: You think it should be different than the preference system?

??? : The single people that are applying for housing anyway, because if there is virtually no one applying (not understandable) preference system at all.

Lori Davidson: I think the fear is if that is allowed that we will get a lot of applications from single college students. I think the fear is if it becomes known--and it will--that we're allowing those kinds of applications we'll get a lot of them.

??? : I think one of the discussions was two weeks ago, the homeless criterion -- it was just a nightmare to prove whether or not they're homeless.

Lori Davidson: And how do we define that. Again, Shelter Plus Care is here. But the other important point to keep in mind is, our mission is not to be emergency housing. We do not provide emergency housing at all.

??? : There would be transitional housing.

(Discussion was had concerning the transitional housing.)

Maren Christensen: I can see a problem there with having worked with the homeless population, and I'm not talking about the woman and children fleeing from the domestic violence situation. The other situation with homelessness is the ability of that person or persons to have a successful tenancy, and given the fact they can suffer severe consequences such as losing the ability to get assistance at all, ever, or being evicted or whatever, I think the people I worked with definitely needed a transitional situation prior to being able to live on their own. My question to admit transitional housing or to the graduate of the transitional program, preference point is (a) there's no control over what the graduation criteria is for those people; (b) if those organizations, and I'm not saying that they do, I'm just saying that they could know that that person would get a preference point, they might graduate people much more quickly who may not be ready to really have a successful tenancy. I guess that would be my concern.

???: You know, it just seems--and I don't know that much but I'm really looking at this as kind of an observer, but it seems to me that when you have the word preferences there is not really any subjective judgment at all. What you're doing is opening up the situation where it's going to get more difficult for staff to interpret how many points to award.

Lori Davidson: It is making it more flexible for more--

???: My point was the criterion of things are, either you're elderly or you're not, or you're a person with disabilities, or if you are a household. There is no interpretation there, just straight out. The assessment part comes in, where the person gets --

???: When you look at transitional housing true, but if you look at our list today, we only have one -- probably ten that would have a preference. It doesn't happen very often. We do work with others and the Y. In Public Housing, if they don't have three strong rental references ----

(Further discussion was had with transitional housing.)

Sharon O'Hare: It appears we're not going to get any consensus or resolution on this. We can carry forward to the Board of Commissioners there was a lot of discussion about preferences and homeless.

Maren Christensen: Is there an agenda on family?

Sharon O'Hare: Yes.

Maren Christensen: So basically the people at Joseph House are going to have a family preference point already?

Sharon O'Hare: Right.

Maren Christensen: You're basically proposing that they have short term, until they can get hooked up somewhere else. So you're saying give them an additional preference point above everybody else. Elderly, disabled -- I hear you saying you would give them two above all other people in the community, whether they're elderly or disabled or have been sitting on the list with three kids. I don't like that. Some people make it into transitional

housing, they're finally off the streets, they're finally getting services. They can hook up with services and you might find this person has probably got a disability. Let's send them to Human Services and they can get on SSI. That's when you get them into the disparity preference point.

???: If they get that and that's a long process. There are a lot of ifs and they have to go through the hoops.

Maren Christensen: But still you're talking about giving them a preference point.

???: I'm must saying there should be more they should get more preference points than either single or the not single.

Sharon O'Hare: The discussion will get carried forward to the Board of Commissioners. The other thing is, remember that these Commissioners' meetings are open to the public, so if you want to come and speak to that, the meeting will be next Tuesday starting at 1:00 o'clock. Moving on, we had also talked about the "no cash" policy. This is something that the Board will decide next week. I believe we first talked about it two meetings ago, and in the interim what we've come up with is the idea of going to an absolute "no cash" policy, but for those people that do not have the checking account or it's burdensome to them to purchase a money order, what we are proposing is setting up an account at Albertson's just down the street from us, the theory being that if you're using only cash to pay for rent and things, you're not just simply sticking it in an envelope--the thought to stop on the way out here, purchase a money order. The cost of the money order at the Albertson's Store will be billed directly to the Housing Authority. You won't have to be costing more by any resident or participant. And then the person at that point can either continue on out to the Housing Authority and pay with money order, or to stick it in an envelope and mail it. The benefit to the Housing Authority for going to a no cash policy just makes sense that the cost for the money order should be borne by the Housing Authority as well. No cash is safer for us as employees. Tom, how much cash do we have on hand.

Tom Chapman: During collections it can run in the neighborhood of sometimes \$10,000. Not just cash itself, but cash and checks. Cash, I've seen it into as high as \$5,000.

Lori Davidson: I've seen it higher.

Sharon O'Hare: That's real dangerous for all of us and any of our clients that happen to be in here. It's not a good policy to have that much cash.

Lori Davidson: We do have a safe and we don't keep a lot of cash on the premises overnight. We're not allowed to under our insurance policy. But just the simple act of having to take it to the bank and bank it is dangerous. The other advantage for the tenant or for the participant is that if they're paying with a money order or a check, you have proof that you've paid it. If you drop money in our lock box and we had a dishonest employee here, or somebody breaks into the lock box and takes it, we don't have any record that you ever made an attempt to pay that and you're going to be held liable for it and you're going to have to pay it again because you don't have any proof that you paid it.

Christine Greenwood: Sharon when she talked to me last week that you had thought about--or I don't know if you decided it yet--to pay the cost of the money order, and I know that at Albertson's on Russell they only charge 39 cents for a money order now. Did you know that? They used to charge 50 and they went down. I don't know what the Albertson's over here charges. But I just wanted to say that I felt that that was a very caring gesture on your part, and that would go a long ways towards looking like you're trying to be helpful and compromise this decisions for other persons. I've always paid in cash and now I'm not allowed to pay cash and so forth. And I just wanted to say that?

Tola Denny: Is it possible--I pay my power bill and phone bill at Albertson's. Is it possible you could make your rent payments at Albertson's the same as that?

Camille Watson: It would slow us down in terms of--we have to have our 14 day notices out for nonpayment as quickly as possible after the 5th. If we were to do that and put our accounting into another four or five day time---

Tola Denny: My power bill and my phone bill, it's immediately credited the next day, so how they're doing it electronically, it's working between Albertson's and the company.

Lori Davidson: We're not set up to do that. They may deposit them directly into their bank or do---we're just not set up to do any kind of electronic transfers like that.

???: Plus we don't want to keep the tenants and participants completely out of it. It's good for Tom and I to have the residents come in and pay the rent. It's surprising how many work orders you can take of, how things are going. We're not going to make it so we're never going to see you, you just give us your money.

Sharon O'Hare: What percentage of people may their rent payments in versus the ones that come in here in person?

Tom Chapman: I would say 50/50 on people walking in.

Maren Christensen: Do you know many people that live in that there would be some problem for them to getting to Albertson's and getting back?

Lori Davidson: Most of them already pay by check or money order. They're getting their Social Security checks normally by direct deposit to the bank and you have to do that now. So they have a bank account.

???: We would probably have to have a provision in this policy, for instance, we have a customer that was in this building who is blind, she likes dealing with cash. She's elderly, she may not transition well with this. I think probably if you request an accommodation, or you feel strongly about paying cash, we're not going to fight this on it.

Maren Christensen: In that situation it would be either get her to Albertson's and get her back or take her cash. It is going to greatly reduce the cash you have on hand.

Lori Davidson: Right.

Sharon O'Hare: This is an open consensus from our discussion.

Maren Christensen: I don't think we've heard from everybody on that, on preferences?

Sharon O'Hare: On preferences?

Maren Christensen: Yes.

Christine Greenwood: In a way of speaking, I haven't really made up my mind at all about it, and then I try to imagine what it would be like if I were on the waiting list or back again on the waiting list, and I was disabled or even a little bit disabled or older, and I learned that it was a first come, first served waiting list and then I saw all of these healthy 20 year olds who just happened to be in school getting housing, and I think that would be very upsetting that they were ahead of me. That's just sort of how I imagined it.

I imagine you would have a lot of hollering and screaming by people who are disabled or elderly that would see a young, healthy college student getting housing ahead of them. So I have to say that I think the preference system is probably the better way and would create a lot less chaos and a lot less emotional stress and so forth.

(Discussion was then had about definition of disability, and staff pointed out the requirements of Social Security concerning disability and what their policy has been concerning disability and the definition of disability.)

Sharon O'Hare: We will then report to the Board of Commissioners that there was no consensus reached on the preference system, and that the no cash policy was agreed upon.

Christine Greenwood: I like how you are willing to make exceptions for like the lady who is blind and might have a hard time getting to Albertson's and back. I think that's admirable that you would allow some exception to that rule.

Sharon O'Hare: Is this something that has to go out for public comment or is this something our Board can establish.

Lori Davidson: We can do that through Board approval.

Sharon O'Hare: Have any of you had a chance to review the information that we gave to you?

Camille Watson: My job is with these required changes is hopefully by the end of this month I will take these changes we had our final rules on from HUD and I implement them into our lease, which is now supposed to be a one year lease versus a month-to-month lease. Implement them into our lease and our handbook. Tom and I will be signing new leases with 210 Public Housing next month. The initial changes in the lease will be put out for public comment for 30 days and after that we will begin signing new leases. There will be plenty of time for the public to comment on the lease changes. We talked a little bit about income targeting. What is important to understand here is, we have a very good balance in Public Housing right now and for the last

couple of years in terms of having a good range of income in our Public Housing sector. We were a little nervous when this ruling first came out and we thought it was going to be a lot of work to calculate each multifamily site to calculate how much the income is, but once we did it, we really have a good mix.

At the bottom section of that first page, occupancy in Public Housing units by police officers and/or income families, I am going to pursue trying to set up some sort of relationship with the Police Department and see if we can't get a police officer interested in renting one of our apartments. Regarding lower income families, if you read the final print here where it says that if I do not have anyone qualified on the Public Housing waiting list, I can lease to an over income family on a month-to-month basis. I doubt that would ever happen. It could happen with maybe a four or five bedroom home, but there's really no place I see here that it will impact us.

On the left hand bottom of the second page, the definition of adjusted income. This is a great new law, I think. What it does is, it permits us to allow income exclusions for those clients who have been unemployed for one year period and then becomes employed, and where we can take the difference between their income when they're unemployed versus the employed income and exclude that difference when I calculate their rent. The law says if they stay in the same type of employment for a second year, we drop down from excluding one hundred percent of their income to excluding thirty percent of their income. So basically, someone that has been employed for a full year, basically gets a guaranteed two year rent reduction. This allows them to try and get on their feet and take care of bills that were incurred when they were unemployed.

It is a little more complex in that we just ran into this QHWRA thing where we have to start counting it like a time clock in that there is a five year limit and that is something we'll have to figure out how to schedule this in a table format. If you are unemployed for a year and then you start a job and I give you an exclusion on your rent, but if after six months you quit that job, I have to count that part as a part of the five year limit.

There is a choice of rental payments and we have already initiated this. It's not in the lease yet but I'm currently enacting it for people who are going through their annual resource. The law simply states that if the income factor of your rent is higher--it doesn't necessarily say it's higher--if your income fluctuation is higher than flat rent, which we're going to set flat rents for each of our units--we're currently using a current payment standard as our flat rent but we're going to have to go back and recalculate those--flat rent just means your reasonable price for whatever sized bedroom unit that you're currently renting. We'll go back and do a property management analysis on all of our houses.

Sharon O'Hare: So a single family home has a different flat rent

Lori Davidson: It's not based on operational cost. It's based on market value. It's not fair market, it's market value. Compared with what other homes in the community are renting for.

Sharon O'Hare: What do you think the affects will be on rents?

Camille Watson: I think there will be very little affect because you would

pick a flat rent versus your income-based rent. When your income-based rent gets so high that it's over the community--there are three or four families who are actually paying flat rent as we speak, but they're renting three and four bedroom homes and the current flat rent that we're using is reasonable compared to what three or four bedroom rents would go for in the community. Say for instance, your income increase and you decided to pay flat rent, if your income decreases, I have to drop your rent back down as an income-base. So there is a section in the new lease that states your income-based rent is this, the flat rent for this home is this, you have the right to accept that.

The choice is income-based on an annual basis. Understand that if you choose income-base for a one year period, that's what you're doing for a year. We have quite decided how we're going to go about this study for flat rent. It's a lot of work as we have almost 70 single family homes. It's not a lot of work necessarily to set flat rent on multiplexes, but it is going to be a lot of work on the single family home. That's why we were hoping to get away with the current payment standards for Section 8, which I thought was fair. But the way that the final rule reads, you do a market analysis for flat rent.

The waiting list on page 3, we have new marketing. We have the ability to do that and we will not pursue that.

Maren Christensen: The new stuff that you guys are going to build will that be site based waiting list?

Camille Watson: That's tax credit housing, not Public Housing. I could see us have a site based waiting list, but it's not necessary. It's really our own apartment building. If you're on the waiting list for a one bedroom, you are essentially on the site based waiting list.

Maren Christensen: If someone needs--they don't drive, they need to live close to work, or get daycare or whatever, and rather than say no, we're operating the list--

Camille Watson: I think the current admission department rules we offer you up to two places. We can't afford to wait for people who come up on the list to pick and choose which Public Housing they want. We do keep in mind people who have children who are already in a certain school district, and we do our best to keep them in that area. If I offer them an apartment that would not work for this, they can put something in writing saying I'm declining this because and we wouldn't take their preferences away on the waiting list for that.

Eligibility of dangerous sex offenders for admission to public housing.

Christine Greenwood: Can I ask what a non-dangerous sex offender is? This is a serious question because I'm wondering if there are all these sex offenders who are not subject to a lifetime registration requirement, the difference for me, I know that in Missoula if you get drunk and take your clothes off and walk down the street, they will prosecute you and require you to register as a sex offender from thereon after. But there's a big difference in my mind between that kind of--

Camille Watson: My understanding of a dangerous sex offender is one that has two--it would have to be a felony, something that you get jailed for.



Maren Christensen: You can get jailed for the other kind and I would have to look at my criminal law. Sexual assault is a lesser offense than rape, like sexual intercourse without consent. And all that involves is penetration of any sort. Sexual assault could be something--it's a lesser offense but you still committed a crime, but I don't know if it has misdemeanor or felony status. I know that sexual intercourse without consent is definitely a felony.

???: But it's not necessarily a lifetime registration.

Maren Christensen: Most likely it would.

Lori Davidson: The state has different rules about it.

Christine Greenwood: The city has different rules about it. Have you ever considered that if you were to allow someone with less than a lifetime registration requirement as a sex offender be in any of your units, have you thought about informing other residents that a registered sex offender lives on the premises?

Camille Watson: The danger of such a thing for these and other kinds of offenders is that we do require criminal background checks for everyone who is on our waiting list or when they're ready to be passed, so we would pick up from police reports and FBI reports who these offenders are and whether they were registered lifetime offenders or if recent offenders, they would never get into our house programs anyway. In terms of liability, if I knew that you rent the house and I knew that they were in the home, what I need to let you know is that the list is available through the county or the city.

Maren Christensen: What about the person who has sexual assault conviction on their record not requiring registration, and I'm not sure that's true I just imagine it, and you put them into a Public Housing unit you might have some liability there because it would be extraordinary. Can you exclude somebody?

Camille Watson: Any property manager is open for liability for a person like that. We have our very stringent admissions policy in terms of criminal activity and recent violent criminal activity, they would never get into our housing.

Maren Christensen: I'm asking if you have the ability to say we're not going to sex offenders period?

Camille Watson: I don't think so.

Lori Davidson: We have the ability to set policies on how we might be able to. For example, our crime policy is if there has been no offense in the past three years that we can let them in. However, we also have a clause that says that if you have a pattern of serious criminal behavior or violent criminal behavior, we can exclude you even if it was older than three years. So if you've gotten four or five arrests in the last ten years, and the oldest one is past say three and a half years, we could still exclude you because you have this pattern of violent behavior.

Maren Christensen: I guess my concern is for the children who often are not

able to tell or don't have the words or concepts for that. We all know that sex offenders repeat offend. Whether they caught or not is the question and that's not going to appear on their criminal background check why they didn't get caught this time or this time or this time. And the rate is outrageously high and there has been study after study after study that shows that. I would just be concerned about kids being around.

Camille Watson: Legally we can exclude certain types of offenders.

Lori Davidson: I think our only recourse is this particular law and this is probably why they did that. If you were a dangerous sex offender and registered on that program at any time in your life, in your life, we can exclude them.

Christine Greenwood: If your problem is that you have a sexual problem and some psychiatrist would call it that, if you were say, for instance, an exhibitionist, could you use that psychiatric problem as a basis for disability in order to gain a preference?

Lori Davidson: No. There's a combination of things that come in here. If a person has a legal disability for which they can request a reasonable accommodation, that's one thing. But as a part of that reasonable accommodation, they have to have some evidence that they are going through a rehabilitation program. We had a case like this this past year. An applicant who exhibited some threatening, harassing behavior and we denied him on the waiting list and he went to Fair Housing and said they're denying me admission and I have a disability. We said we would be happy to consider it, but he has not for any kind of reasonable accommodation, he's not as far as we know got a disability that qualifies him to ask for a reasonable accommodation. He's never provided us any verification of that. And the second part of that is, HUD does not require us to house under any circumstances someone who has exhibited violent or threatening behavior. We do have some recourse here. Having just gone through that, I can speak about it a little bit.

(Discussion was had concerning the sex offender programs.)

???: In that scenario of someone moving into a Public Housing unit and there's a sex offender next door and you said requirements tell you you tell them there is a list of sex offenders and it's available at city hall, in any housing situation you need to get the name of all their neighbors. How is it set up? By name or by address?

Lori Davidson: It's by name.

???? : So you need to go door to door and ask people their names and then take those names. I'm not being hard to get along with, but this is my general question about how that system works.

(Discussion then ensued about how the list appears with name and then address.)

Lori Davidson: If they're registered sex offenders they're not going to be in Public Housing anyway.

Christine Greenwood: I was talking about the technicality of lifetime

registration and there may be some categories of sex offender that don't fall into that category. I don't know if it would be just your choice to not allow them to be in housing. I'm not sure of the internal workings here. It may be a technicality but they could if they were not required to be registered as a lifetime offender, a lifetime registration. I know there are varying degrees, especially in Missoula.

Camille Watson: Let's go into the community service programs. I'll be brief about the pet ownership provision. There is not any final rule on that so we're not acting on that issue at all at this point until HUD gives us the final rule. Apparently there were close to 6,000 comments on the pet ownership in Public Housing rule. So they're working on going through those comments and trying to come up with that final rule, on whether or not we're going to allow common household pets. The new community service requirement, we will be including those in the lease incentive handbook. All family members in a Public Housing household over 18 years old, not disabled or unable to perform community service, are required to do eight hours a month community service in order to stay in the Public Housing program. So if you're elderly, you're excluded. If you're disabled and have a certification from a provider stating that you are unable to provide any kind of community service, then you are also excluded. Or if you are in a HUD funded or state funded training program, such as voc rehab, family self-sufficiency who fall under the funded training program, you are also excluded from those requirements. If you are 18 or older, not elderly, not disabled, every person in that household will be required to serve 8 hours a month.

What came up at the last meeting was, it didn't exclude students who are 18 year old high school students, which I have a lot of. They're required to give the 8 hours community service. I'm not quite sure how to handle that yet. I'm going to talk to other Housing Authorities and see what they've done. I'm apt to say if you're a full time high school student, you're excluded.

Lori Davidson: They could also be involved in things in school that would qualify for those community service hours too.

Camille Watson: A lot of people are excluded, but who we're looking at those who are not working, they're going to have to give us eight hours a month community service. If they don't, at the end of a one year period during their annual review and they cannot prove that they have done that, we can terminate their lease, or we can so say we're serious about the community service, you have to make up the hours you didn't do last year and we're going to give you one more shot. If you don't do it this next time, we're going to terminate your lease. If the member of the family who is not doing community service chooses to leave the household, then we wouldn't terminate the lease.

Maren Christensen: My question is, how much flexibility you have in defining community service.

Camille Watson: I have a lot of flexibility. Dave Gentry and I are going to get together and define 10, 20 community service providers. This is the plan and how do you think we can best solve it.

Maren Christensen: If you are excluding people who have a FIA with FAIM, my concern is that this community service thing is the same issue with the FAIM.

If you have a single mom who has got little kids who aren't in school, to do 8 hours of community service is either going to mean she has to take the kids with her or she has to put them in daycare, which could get costly for someone.

Camille Watson: A single parent could qualify for child care.

???: Could they do it say ten hours one month and six hours the next?

Camille Watson: I'm going to check on it a little more.

Maren Christensen: What if you take your kids to the reading story hour at the library?

Camille Watson: If you fall into the category where you're working in the community service, I think it would benefit you in terms of work, in terms of self-esteem, in terms of whatever. It would serve you to go out into the community, meet some people. I think it's a positive, I really do.

Maren Christensen: I'm not saying it's not a positive thing, but I'm just saying if I go and volunteer at the Food Bank for eight hours a month, that's a good thing. But also, if I take my kids to some literacy activity is that a good thing?

Camille Watson: My understanding of this is that HUD is saying Public Housing clients need to give something back to the community they live in. I'm speaking for myself here, I'm not sure reading knowledge of the children is necessarily giving back to the community.

(Minutes will be completed in summary format)

Maren Christensen: Commented on the different concepts of community service, and questioned that aiding in the development of one's children should be considered a community service.

Camille Watson: Commented on the requirements of tracking community service and stated that one person will not decide on the importance of community service, but it would be decided which matters on an individual basis would be deemed community service, and that encouraging tenants and participants to meet other people and get out into the community would be good for each one.

Maren Christensen: Voiced her concern that the cost of babysitting services might be a detriment to the participant.

(Discussion was had concerning the members present concerning the problems involved and what some of the solutions are.)

Lori Davidson: Commented that the Staff would work with other community service agencies in Missoula and establish the guidelines and definition of what the community service would be for the participants. She then stated that the input from those present was good and that a definition would be settled upon.

One of the members present then commented on the good that community service does for those people receiving assistance, and that it increased her self-

esteem by participating in community service.

Camille Watson: Commented that the community service program would be established that would be of the best benefit to those who were required to participate in the community service program.

(Discussion was had concerning the benefits of parenting classes and whether or not attending those types of things should be considered as a community service.)

Sharon O'Hare: Presented the proposed budget for the Public Housing program. She explained the change in the name of the CIAP program, and that the funds were used to make improvements, management. She explained that the management covered by this program was not the operating fund as that came from a different money source. She continued to explain the asset management plan. She stated that the Housing Authority needed to come up with a plan to assess the condition of the held properties and where the capital fund monies should go to get the biggest return. She presented the survey presented by Nick Kaufman concerning the condition of the properties, i.e., roofs, windows, paint, siding, decks.

She continued that as a part of the asset management, it was established into a database by type of repair and modernization that needed to take place, i.e., one for windows, one for siding, etc. This would enable those improvements to be completed and which ones would be done first. She continued that no capital fund monies would be spent on the proposed sale properties as those were appraised "as is." She continued that should any repairs need to be done in order to sell the properties, those repairs would be paid for from the sale proceeds and not from the capital fund.

She explained the management funds that were taken from the capital fund were used to pay certain salaries, and went on to list those. She continued that in order to establish what would be spent depended on what would be received.

She explained that HUD has gone on a formula system. She continued that they plan to receive 90 percent of what was received in 1999. She explained what would be done with the monies that would be received; i.e., salaries, some to the Russell Square development for new offices, etc. After taking all the monies from the top there are the monies to be spent on the Public Housing units directly, such as that \$5,000 worth of kitchen appliances had been replaced, such as stoves, refrigerators. She continued that there were a number of units that needed concrete work done, retaining walls, etc., and how expensive that would be in order to complete that. She stated that some of the improvements that would be done would be done to be the least maintenance cost, such as replacing wood siding with vinyl siding. While it would be a lot of dollars to begin with, in the long run the maintenance cost would be less. She continued concerning replacing the window treatments with good quality vinyl blinds. The floor covering costs were then explained and the transition that would be made to different floor coverings.

She explained the requirement for an energy efficiency survey to be done on the units. She then explained that Camille had the ability to go to the various multifamily units, for example, to survey what needed to be done to make them a nicer place to live, such as the landscaping.

She then explained that the monies could be moved around to meet a specific

purpose at the discretion of the Housing Authority.

Lori Davidson: Commented on that there were things not on the list, such as furnace replacements, and that the budget for CIAP in 1999 would carry those items through the next year as well, and that items that were left off the list were funded in another year's funding.

Sharon O'Hare: Commented that perhaps it would be advantageous to go to a two year funding plan. She explained that the monies received did not have to be spent in one year, but that they could stretch out over a two to three year period.

She completed the budget discussion and then moved on to what the plans would be for a future Interim Advisory board. She continued that the plans of going to one and two bedroom housing is consistent with the city's own work and own study of housing needs in Missoula. She presented the Missoula Consolidated Plan and explained the process and the use of community development block grant funds, and the results of that plan, and the results of the survey of households in Missoula as to income, house numbers, house size, and the requirement for housing assistance. She stated that many of the agencies in Missoula were involved in moving towards housing purchase and rents that would be affordable, and that the excerpt presented at the meeting formed the basis of the Housing Authority's strategic plan to move ahead and create new and affordable housing, particularly addressing the need of one and two bedroom housing units.

Sharon then moved on to the future plans for additional IAB meetings. She went on that it was the hope that the Interim Advisory Board would continue and would meet to assist and advise in the operations of the Housing Authority. She asked for advice from the members present how they would like to proceed as a Board, whether they would want Staff involved, how often to meet, etc.

The requirement for the Interim Advisory Board to continue was then discussed and then explained that a Resident Advisory Board would have to be established at the end of one year, and that the members would be elected, that by-laws and a charter would be established, and that the role of the advisory board was important to the Housing Authority and the Board of Commissioners.

Discussion was had concerning the number of members that would serve on the Board, and that perhaps it would be expanded to include nine members, and try to include additional folks, such as the elderly.

Volunteers then stepped forward. The consensus was that the Staff should continue to be a part of the Interim Advisory Board meetings.

The discussion was had concerning the best time of day to hold the meetings, and a discussion concluded that the meetings would be held the second Tuesday of the month at 2:00 p.m., and that the meetings should last more than an hour in order for everyone to be able to express their concerns and ideas.

Those volunteering were: Maren Christensen, Christine Greenwood, Tola Denny, Elizabeth Marshall and Louise Norwood.

Discussion was then had concerning the next meeting to be held July 17, 2000

at 2:00 p.m.

The meeting was concluded at: \_\_\_\_\_.