

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

PHA Plans

5 Year Plan for Fiscal Years 2000 - 2004
Annual Plan for Fiscal Year **2001**

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

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

**PHA Plan
Agency Identification**

PHA Name: **Missoula Housing Authority**

PHA Number: **MT33**

PHA Fiscal Year Beginning: (mm/yyyy) **10/2001**

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)
 - Denny's Copy Shop

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)

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

PHA Goal: Provide an improved living environment

Objectives:

- Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
- Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
- Implement public housing security improvements:
- Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
- Other: (list below)

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

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

Objectives:

- Increase the number and percentage of employed persons in assisted families:
- Provide or attract supportive services to improve assistance recipients' employability:

- Provide or attract supportive services to increase independence for the elderly or families with disabilities.
- Other: (list below)

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

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:
 - ◆ project size between four and twelve units for family projects,
 - ◆ higher densities for elderly and special needs housing,
 - ◆ good proximity to necessary services and public amenities,
 - ◆ neighborhood compatibility,
 - ◆ measures to insure efficient management and maintenance, and
 - ◆ 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 "local" admissions preference system.
- d. Revise lease and tenant handbook.

- e. Revise pet policies.
- f. Implement tenant community service requirements.
- g. Implement "flat 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:

- ◆ active marketing of its programs to the community, and
- ◆ 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:

- ◆ providing the community with quality data on housing and housing needs,
- ◆ educating the community about housing issues and policy, and
- ◆ 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:
 - ◆ elderly or disabled persons with fixed incomes, and
 - ◆ 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 2002
[24 CFR Part 903.7]

i. Annual Plan Type:

Select which type of Annual Plan the PHA will submit.

Standard Plan

Streamlined Plan:

- High Performing PHA**
- Small Agency (<250 Public Housing Units)**
- Administering Section 8 Only**

Troubled Agency Plan

ii. Executive Summary of the Annual PHA Plan

[24 CFR Part 903.7 9 (r)]

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

Executive Summary

The Missoula Housing Authority (MHA) FY2002 Annual Plan covers the period October 1, 2001 through September 30, 2002. 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 household income over \$24,000 for a family to be able to affordably rent a two-bedroom apartment.

Forty-five public housing units (most of which are larger three- and four-bedroom single family homes) are in the process of being sold by the MHA. The sales should be completed by the spring of 2002. This fall, MHA will apply to HUD for approval to replace these public housing units with 45 more efficient one- and two-bedroom multi-family public housing units.

In the coming year, the MHA will continue to effectively manage our remaining inventory of 165 public housing units, 652 Section 8 vouchers (including 40 Welfare-to-Work vouchers), and 87 Shelter Plus Care vouchers.

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.

In May of 2001, MHA broke ground on 53 new one- and two-bedroom apartments and a new administrative office facility, which will 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).

Following this Executive Summary is a detailed list of the new activities proposed for FY2002.

Missoula Housing Authority: Proposed New Activities for FY2002

PUBLIC HOUSING

- Complete transfers of Sale & Replacement households
- Implement new lease, with one-on-one lease-up interviews for all 165 PH households
- Lease up 53 units at Russell Square
- Complete Public Housing Property book
- Update Public Housing Tenant Manual to include latest Lead Based Paint info
- Re-calculate utility allowance
- Re-vamp PH Program forms book for consistency of communication
- Develop crime prevention plan

SPECIAL PROJECTS

- Complete One Year Agency Plan for FY2002
- Complete 5 Year Asset Management Plan for MHA properties
- Submit application to HUD for 25 new public housing units (replacement)
- Project management/owner's rep on Russell Square construction
- Prepare application for City CDBG funds (fall 2001)
- Manage 99 CIAP, 00, 01 Capital Fund programs
- Investigate feasibility of MHA activity in support of assisted living facility development

ADMISSIONS

- Create "How to" manual for standard procedures
- Improve Orientation Sessions by making them more visual, simpler

SOCIAL SERVICES

- Expand FSS program to 100 participants
- Re-write FSS Action Plan
- Expand social service coordination services to Parkside Village, Russell Square

SECTION 8/SHELTER+CARE

- Complete housing search advocacy work for S&R households
- Conduct landlord outreach, education and recruitment for S8, S+C participation, including lead based paint information
- Conduct client outreach at public assistance agencies offices and through community education
- Consolidate forms used in program
- Implement Section 8 Home ownership Program
- Add 61 Fair Share vouchers
- Add 35 S8 vouchers
- Add 20 S+C vouchers

- Continue implementation of staff HQS inspection services, including courtesy inspections and developing a database for tracking inspections

FISCAL/ADMINISTRATIVE

- Upgrade Tenmast software to Windows operating environment
- Set up tax credit accounting for Russell Square
- Set up accounting for Public Housing Replacement project
- Improve capital fund accounting – track expenditures by addresses
- Implement new & improved phone system at Russell Square offices
- Implement new & improved data/communication system at Russell Square offices
- Streamline Consumable Inventory accounting

MAINTENANCE

- Develop Maintenance Plan for Russell Square
- Move MHA offices to Russell Square
- Complete S&R turnover work as needed

Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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

Table of Contents

Page #	
	Executive Summary 1
	Housing Needs 10
	Financial Resources 16
	Eligibility, Selection, Admissions
	Public Housing 18
	Section 8 24
	Rent Determination
	Public Housing 28
	Section 8 Tenant-Based Assistance 31
	Operations & Management Plan 33
	Grievance Procedures 35
	Capital Improvement Needs.
	Capital Fund Program Annual Statement 36
	Planned Disposition of Public Housing 54
	Designation of Housing 55
	Conversions of Public Housing 56
	Homeownership Programs 58
	Community Service & Self-Sufficiency Programs 60
	Safety & Crime Prevention 63
	Ownership of Pets 65
	Civil Rights & PHA Plans Certification 66
	Fiscal Audit for FY 2000 67
	Asset Management 68
	Other Information 69

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 2001 Capital Fund Program Annual Statement: **included in FY 2001 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
X FY 2001 Capital Fund Program 5 Year Action Plan **mt033c01**
X Public Housing Drug Elimination Program (PHDEP) Plan **mt033d01**
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; 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
X	Schedule of flat rents offered at each public housing development	Annual Plan: Rent Determination

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	X check here if included in the public housing A & O Policy	
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
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program.	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
X	Policies governing any Section 8 Homeownership program X 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
	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
X	The most recent Public Housing Drug Elimination Program (PHDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
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	689		866 (56%)
Extremely low income <=30% AMI	450	65%	
Very low income (>30% but <=50% AMI)	205	30%	
Low income (>50% but <80% AMI)	34	5%	
Families with children	485	60%	
Elderly families	394	49%	
Families with Disabilities	351	43%	
Race/ethnicity: white	782	89%	
Race/ethnicity: black	3	<1%	
Race/ethnicity: Native American	76	9%	
Race/ethnicity: Asian	3	<1%	
Characteristics by Bedroom Size (Public Housing Only)			
		% of PH Waiting List (286 total)	
1BR	110	39%	NA
2 BR	138	48%	NA
3 BR	34	12%	NA
4 BR	4	1%	NA
5 BR	0		NA
5+ BR	0		NA

Housing Needs of Families on the Waiting List

Is the waiting list closed (select one)? 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

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

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)
Develop new, replacement public housing

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)

Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan year.

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

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2001 grants)		
a) Public Housing Operating Fund	285,000	
b) Public Housing Capital Fund	526,336	
c) HOPE VI Revitalization	0	
d) HOPE VI Demolition	0	
e) Annual Contributions for Section 8 Tenant-Based Assistance	2,847,400	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	51,595	
g) Resident Opportunity and Self-Sufficiency Grants	0	
h) Community Development Block Grant	0	
i) HOME	0	
Other Federal Grants (list below)		
FSS Coordinator	32,000	
ShelterPlusCare	334,604	
2. Prior Year Federal Grants (unobligated funds only) (list below)		
00 Capital Fund	30,000	
3. Public Housing Dwelling Rental Income	279,180	
4. Other income (list below)		
Sale & Replacement sale proceeds	3,000,000	
Interest on S&R sale proceeds	80,000	
PH Reserves Interest	16,000	
Voucher Reserves Interest	3,500	
FSS Forfeits	4,000	
PH Charges & Fees	10,000	

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
5. Non-federal sources (list below)		
Non-HUD Dwelling rental income	8,400	
Non-HUD Interest income	950	
Russell Square Dwelling rent income	141,500	
Russell Square Comm'l rent income	20,417	
Russell Square Interest	500	
City of Missoula Housing Coor.	45,796	
River Ridge Social Services Fee	9,000	
Total resources	7,726,178	

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?

- 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 X 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)

X Emergencies

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

c. Preferences

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

- 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)

- X The Section 8 Administrative Plan
X 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?

- X Through published notices
X 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)

- X 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
X \$26-\$50

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

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

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

For the earned income of a previously unemployed household member

For increases in earned income

Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

Fixed percentage (other than general rent-setting policy)

If yes, state percentage/s and circumstances below:

For household heads

For other family members

For transportation expenses

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

Other (describe below)

e. Ceiling rents

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

Yes for all developments

Yes but only for some developments

No

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

For all developments

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

For specified general occupancy developments

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

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

Other (list below)

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

Market comparability study

Fair market rents (FMR)

95th percentile rents

75 percent of operating costs

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

Operating costs plus debt service

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

f. Rent re-determinations:

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

- Never
- At family option
- 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
- X \$26-\$50

b. X 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.)

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	165	55
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 III

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

Capital Fund Grant Number MT06P03350101 FFY of Grant Approval: (10/2001)
 Original Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	331,754
3	1408 Management Improvements	
4	1410 Administration	36,862
5	1411 Audit	
6	1415 Liquidated Damages	
7	1430 Fees and Costs	
8	1440 Site Acquisition	
9	1450 Site Improvement	14,000
10	1460 Dwelling Structures	103,120
11	1465.1 Dwelling Equipment-Nonexpendable	23,600
12	1470 Nondwelling Structures	
13	1475 Nondwelling Equipment	17,000
14	1485 Demolition	
15	1490 Replacement Reserve	
16	1492 Moving to Work Demonstration	
17	1495.1 Relocation Costs	
18	1498 Mod Used for Development	
19	1502 Contingency	
20	Amount of Annual Grant (Sum of lines 2-19)	526,336
21	Amount of line 20 Related to LBP Activities	
22	Amount of line 20 Related to Section 504 Compliance	
23	Amount of line 20 Related to Security	14,000
24	Amount of line 20 Related to Energy Conservation Measures	

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

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
HA Wide	Operations	1406	
HA Wide	Maintenance, other salaries	1406	331,754
HA Wide	Management Improvements	1408	0
HA Wide	Administration	1410	
HA Wide	Management Salaries	1410	36,862
HA Wide	Liquidated Damages	1415	0
HA Wide	Fees and Costs	1430	0
HA Wide	Site Acquisition	1440	0
HA Wide	Site Improvement	1450	0
HA Wide	Dwelling Structures	1460	
HA Wide	Replace 2 boilers & 1 GFA furnace	1460	6,000
HA Wide	Replace cabinets/countertops (MF&SF)	1460	59,620
HA Wide	Replace siding	1460	7,000
HA Wide	Dwelling Equip - nonexpendable	1465.1	
HA Wide	Appliance replacement (MF&SF)	1465.1	23,600
HA Wide	Nondwelling Structures	1470	0
HA Wide	Nondwelling Equipment	1475	
HA Wide	New maintenance vehicle	1475	10,000
HA Wide	Computers, office equip	1475	7,000
HA Wide	Demolition	1485	0
HA Wide	Relocation Cost	1495.1	0
HA Wide	Mod Used for Development	1498	0
HA Wide	TOTAL -	All Accounts	\$481,836

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

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
MT33-002 VANTAGE VILLA	Operations	1406	0
	Management Improvements	1408	0
	Administration	1410	0
	Liquidated Damages	1415	0
	Fees and Costs	1430	0
	Site Acquisition	1440	0
	Site Improvement	1450	
	Site Fencing at River	1450	6,000
	Dwelling Structures	1460	
	Media Room		6,000
	Replace cabinets/countertops		24,500
	Dwelling Equip - nonexpendable	1465.1	0
	Nondwelling Structures	1470	0
	Nondwelling Equipment	1475	0
	Demolition	1485	0
	Relocation Cost	1495.1	0
	Mod Used for Development	1498	0
MT33-002	TOTAL -	All Accounts	\$36,500

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

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

<i>Development Number/Name</i> HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
MT33-009 Toole, Phillips Multi-Family	Operations	1406	0
	Management Improvements	1408	0
	Administration	1410	0
	Liquidated Damages	1415	0
	Fees and Costs	1430	0
	Site Acquisition	1440	0
	Site Improvement	1450	0
	Dwelling Structures	1460	0
	Dwelling Equip - nonexpendable	1465.1	0
	Nondwelling Structures	1470	0
	Nondwelling Equipment	1475	0
	Demolition	1485	0
	Relocation Cost	1495.1	0
	Mod Used for Development	1498	0
MT33-009	TOTAL -	All Accounts	\$0

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
MT33-011 S. 4 th W., Russell Pk & Single-Family	Operations	1406	0
	Management Improvements	1408	0
	Administration	1410	0
	Liquidated Damages	1415	0
	Fees and Costs	1430	0
	Site Acquisition	1440	0
	Site Improvement	1450	
	Dwelling Structures	1460	0
	Dwelling Equip - nonexpendable	1465.1	0
	Nondwelling Structures	1470	0
	Nondwelling Equipment	1475	0
	Demolition	1485	0
	Relocation Cost	1495.1	0
	Mod Used for Development	1498	0
MT33-011	TOTAL -	All Accounts	\$0

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
MT33-012 Russell Pk, Dplx, & Single-Family	Operations	1406	0
	Management Improvements	1408	0
	Administration	1410	0
	Liquidated Damages	1415	0
	Fees and Costs	1430	0
	Site Acquisition	1440	0
	Site Improvement	1450	0
	Dwelling Structures	1460	0
	Dwelling Equip - nonexpendable	1465.1	0
	Nondwelling Structures	1470	0
	Nondwelling Equipment	1475	0
	Demolition	1485	0
	Relocation Cost	1495.1	0
	Mod Used for Development	1498	0
MT33-012	TOTAL -	All Accounts	\$0

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
MT33-014 Scattered Single Family	Operations	1406	0
	Management Improvements	1408	0
	Administration	1410	0
	Liquidated Damages	1415	0
	Fees and Costs	1430	0
	Site Acquisition	1440	0
	Site Improvement	1450	0
	Dwelling Structures	1460	0
	Dwelling Equip - nonexpendable	1465.1	0
	Nondwelling Structures	1470	0
	Nondwelling Equipment	1475	0
	Demolition	1485	0
	Relocation Cost	1495.1	0
	Mod Used for Development	1498	0
MT33-014	TOTAL -	All Accounts	\$0

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
MT33-018 Grandview Single Family	Operations	1406	0
	Management Improvements	1408	0
	Administration	1410	0
	Liquidated Damages	1415	0
	Fees and Costs	1430	0
	Site Acquisition	1440	0
	Site Improvement	1450	
	Fencing	1450	8,000
	Dwelling Structures	1460	0
	Dwelling Equip - nonexpendable	1465.1	0
	Nondwelling Structures	1470	0
	Nondwelling Equipment	1475	0
	Demolition	1485	0
	Relocation Cost	1495.1	0
	Mod Used for Development	1498	0
MT33-018	TOTAL -	All Accounts	\$8,000

2001 Capital Fund Summary by Development

HA WIDE	TOTAL -	All Accounts	\$481,836
MT33-001	TOTAL -	All Accounts	\$0
MT33-002	TOTAL -	All Accounts	\$36,500
MT33-003	TOTAL -	All Accounts	\$0
MT33-008	TOTAL -	All Accounts	\$0
MT33-009	TOTAL -	All Accounts	\$0
MT33-011	TOTAL -	All Accounts	\$0
MT33-012	TOTAL -	All Accounts	\$0
MT33-014	TOTAL -	All Accounts	\$0
MT33-018	TOTAL -	All Accounts	\$8,000
	TOTAL – ALL DEVELOPMENTS		\$526,336

**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)
HA WIDE	3/2003	9/2004
MT33-001	3/2003	9/2004
MT33-002	3/2003	9/2004
MT33-003	3/2003	9/2004
MT33-008	3/2003	9/2004
MT33-009	3/2003	9/2004
MT33-011	3/2003	9/2004
MT33-012	3/2003	9/2004
MT33-014	3/2003	9/2004
MT33-018	3/2003	9/2004

(2) 5-Year Action Plan

Agencies are encouraged to include a 5-Year Action Plan covering capital work items. This statement can be completed by using the 5 Year Action Plan table provided in the table library at the end of the PHA Plan template **OR** by completing and attaching a properly updated HUD-52834.

- a. Yes No: Is the PHA providing an optional 5-Year Action Plan for the Capital Fund? (if no, skip to sub-component 7B)
- b. If yes to question a, select one:
- The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment **mt033c01**
- 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)
For PHA-wide activities and Vantage Villa development (MT033P002)

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

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

Optional 5-Year Action Plan Tables			
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development
N/A	PHA Wide	0 of 165	0
Description of Needed Physical Improvements or Management Improvements for Capital Fund FY2001-2005			Planned Start Date (HA Fiscal Year)
OPERATIONS - Salaries			1,658,770
ADMINISTRATIVE - Salaries			184,310
FEES & COSTS			0
EXTERIOR			
Roof Replacement			51,500
Siding Replacement			126,000
Window/Door/Garage Door Replacement			46,900
Re-build Decks			0
Add landscaping, site amenities, playground equipment			21,400
Water/sewer line replacement			10,000
Site fencing			8,000
Other site/exterior improvements			0
INTERIOR			
Replace heating systems (boiler or GFA furnace)			24,000
Replace cabinets & countertops			86,150
Replace flooring (carpet, VCT, sheet vinyl)			in OP BDGT
Replace appliances			125,450
Add sheetrock @ concrete block			0
NON-DWELLING EQUIPMENT			
Vehicles			12,000
Computer, Office Equipment			35,000
Maintenance tools			10,000
Total estimated cost over next 5 years			\$2,399,480

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

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

Optional 5-Year Action Plan Tables				
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development	
MT033P002	Vantage Villa	0 of 38	0	
Description of Needed Physical Improvements or Management Improvements for Capital Fund FY2001-2005			Estimated Cost	Planned Start Date (HA Fiscal Year)
OPERATIONS - Salaries			0	
ADMINISTRATIVE - Salaries			0	
FEES & COSTS			0	
EXTERIOR				
Roof Replacement			0	
Siding Replacement/Siding Paint			23,000	FY2002
Window/Door/Sliding Door Replacement			30,400	FY2002
Re-build Decks			0	
Add landscaping, site amenities, playground equipment			0	
Water/sewer line replacement			0	
Site fencing			6,000	FY2002
INTERIOR				
Replace/upgrade heating/cooling systems (electric baseboard, AC overhaul)			33,800	FY2002
Replace cabinets & countertops			133,000	FY2002
Replace flooring (carpet, VCT, sheet vinyl)			6,000	FY2004
Replace appliances			0	
Build media room			6,000	FY2002
Total estimated cost over next 5 years			\$232,200	

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 X 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:
- X** 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?
MHA will apply to HUD to develop 45 units of replacement public housing, using disposition sale proceeds to finance.

Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

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

1 Yes X 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.)

No new disposition activities are planned. MHA expects to complete its current disposition activities by mid-October, 2001, just after the beginning of FY2002.

2. Activity Description

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

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.

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

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

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

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

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

2. Activity Description

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

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

- 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.)

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

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

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

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

If yes, what was the date that agreement was signed? 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:

[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.

- X** Yes No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- X** Yes No: Has the PHA included the PHDEP Plan for FY 2002 in this PHA Plan?
- X** Yes No: This PHDEP Plan is an Attachment. (Attachment Filename: **mt033d01**)

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. Yes No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
 Attached at Attachment (File name) **mt033b01**
 Provided below:
3. In what manner did the PHA address those comments? (select all that apply)
 Considered comments, but determined that no changes to the PHA Plan were necessary. **Note: RAB comments were generally supportive of Plan, did not require Plan amendment.**
 The PHA changed portions of the PHA Plan in response to comments
List changes below:
 Other: (list below)

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

1. Yes No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)
2. Yes No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)
3. Description of Resident Election Process
 - a. Nomination of candidates for place on the ballot: (select all that apply)
 Candidates were nominated by resident and assisted family organizations
 Candidates could be nominated by any adult recipient of PHA assistance
 Self-nomination: Candidates registered with the PHA and requested a place on ballot
 Other: (describe)
 - b. Eligible candidates: (select one)
 Any recipient of PHA assistance
 Any head of household receiving PHA assistance
 Any adult recipient of PHA assistance

- Any adult member of a resident or assisted family organization
- Other (list)

c. Eligible voters: (select all that apply)

- All adult recipients of PHA assistance (public housing and 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)

Continued commitment of funding for the City of Missoula Housing Coordinator as a member of the Missoula Housing Authority staff.

D. Other Information Required by HUD

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

7. 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.

Missoula Housing Authority Annual Agency Plan (FY2002) Public Involvement

- Legal Notice of Plans Publication, Availability for Review, Public Hearing: 3 Sundays preceding Public Hearing (7/15/01, 7/1/01, 6/10/01)**
- News Article in Missoulian re: Plans Publication, Availability for Review, and Public Hearing**
- Published Display Ad in Missoulian re: Plans Publication, Availability for Review, and Public Hearing (7/1/01, 6/10/01)**
- Sent Post Card Mailing to 800+ MHA Program Participants re: Plans Publication, Availability for Review, Public Hearing**
- Held four Resident Advisory Board meetings: 1/10/01, 2/7/01, 3/14/01, 5/9/01 with One Year Agency Plan Review as focus**
- Conducted Public Hearing: July 17, 2001**

RESIDENT ADVISORY BOARD

Missoula Housing Authority

Wednesday, July 11, 2001

Vantage Villa Community Room

- MINUTES -

Members Present: Facilitator, Sharon O'Hare; Terri Loftus; Mary Lewis; Christy Odum; Christine Greenwood; and Theresa D'Angelo Gunderson.

Staff Present: Terry Hood.

The meeting was called to order by Facilitator, Sharon O'Hare, at 12:20 pm. O'Hare began the meeting by stating that this would be a wrap-up luncheon for the Resident Advisory Board (RAB) and the next meeting would be held in approximately four months.

I. One Year Agency Plan

O'Hare stated that there is a copy of the Missoula Housing Authority's (MHA) One Year Agency Plan available for review. Loftis noted that she is extremely proud of the MHA for expanding the social services as outlined in the new plan. All members present agreed that there were several positive changes in the plan that these changes would have a very positive overall impact.

II. Drug Elimination

O'Hare revisited the issue of hiring a police officer. She indicated the main role of the officer would be to provide an official presence throughout the numerous Public Housing sites and visit regularly with the residents. Loftis noted that this could bring a negative effect by deterring people from visiting Public Housing and possibly giving others negative ideas. O'Hare responded by stating that the officer would go door-to-door getting to know the tenants including youths and familiarizing themselves with the day to day activities at these units. Greenwood agreed that this could have a possible impact as long as tenants' perception was positive and that their needs would be met.

Loftis added that the Tenant Association needed to be revived. Lewis noted that any existing Tenant Association be eliminated and completely starting over with any new association. O'Hare stated that the MHA has tried for several years to encourage the formation of Resident Councils with little result and noted the requirement that the Tenants Association and Resident Councils be completely separate entities from MHA staff.

Discussion then continued regarding drug elimination and adding a police officer to staff. Gunderson discussed how the MHA has become more accommodating in comparison to when she first moved in.

Loftis added that there had been certain instances at Vantage Villa regarding guns, hiding runaways, and other issues that were negatively effecting the residents at Vantage Villa. Greenwood stated that in her current situation, she has drug activity all around her which makes an extremely uncomfortable living environment and that she feels very positive toward the hiring of an officer. Gunderson added

that there were two officers employed through the Great Falls Housing Authority which eliminated most of the issues being discussed and things changed for the better. O'Hare asked if the overall impression was that it was a good idea to have an officer and all present agreed.

III. National Conference – Dallas, Texas.

O'Hare introduced Christine Greenwood. Greenwood began her discussion by thanking the Missoula Housing Authority and especially Sharon O'Hare and Ed Mayer for giving her the opportunity to attend this conference. She added that over 1,000 people from all over the United States attended the conference. Greenwood described her experience as "awesome, enlightening, and very high energy". Greenwood discussed the various sessions, programs, and other electives that she attended. She added that several RAB's have poor relationships with their Housing Authority's and noted that tenants through the Missoula Housing Authority are extremely lucky for the relationship that each have. Greenwood will be leaving the materials she received at the conference in the Community Room for review.

O'Hare then raised the issue that only 2 years ago Resident Advisory Boards did not even exist and noted difficulties in encouraging participation. Gunderson stated that in her past experience, tenants were required to attend 3 meetings and if people were on any kind of assistance, their Housing Authority provided training to them. Greenwood noted that through the conference she learned that few Housing Authorities have these attendance requirements and even suggested the use of gift certificates and luncheons to encourage attendance. Greenwood also noted that the New York City Housing Authority was very proud of the turn-around they have made and attributes it to drug elimination.

IV. Attendance.

O'Hare asked the Board for ideas on how to entice more representation at the RAB meetings. O'Hare noted the challenges of high attendance and that having a Community Service Requirement may encourage greater attendance. Gunderson suggested a Resident Open House that would provide detailed information about the Resident Advisory Board and its purpose. She also suggested renaming the RAB. O'Hare explained that the use of the title must remain to ensure the mission of the RAB. O'Hare also suggested and encouraged the creation of councils; however, the MHA is not permitted to interfere in manner with the exception of encouragement. Lewis interjected with several concerns regarding 'problem' residents who seem to discourage these types of group formations. O'Hare responded by discussing the need for self-policing and self-government within Vantage Villa and that a Resident Council would be a very helpful and useful tool. Loftis added that the recent changes in residents may make it easier to get a resident council started.

O'Hare asked the Board if having an open house was a positive idea. Everyone attending agreed and the following members volunteered to be on a planning committee:

Sharon O'Hare	Theresa D'Angelo-Gunderson
Mary Lewis	Christine Greenwood

V. Adjournment.

The meeting adjourned at 1:07pm.

SOH/tlh

**MISSOULA HOUSING AUTHORITY
RESIDENT ADVISORY BOARD MEETING
MINUTES
MARCH 14, 2001**

A meeting of the Interim Advisory Board was called to order by Sharon O'Hare.

IN ATTENDANCE

Staff: Sharon O'Hare, Camille Watson and Paula Garland

**Residents:Christine Greenwood, Terri Loftis, Christy Odum, Debbie Ham,
M. Lewis, Joe Gyles, Melissa Blue, Tola Denny**

Sharon O'Hare: What I thought we would do today, and as part of your official duties as the Resident Advisory Board is to take a look at how the Housing authority proposes to spend the capital fund money, and I wanted to walk you through our budget, and show you where we ended up. And then I want to talk about what you think the best use of our funds might be any extra amount. What we're looking at is that first sheet I passed out to you. We're talking about the amount of money that the Housing Authority receives every year to take care of our Public Housing properties. So we're asking for your input even though you don't live in Public Housing properties. We still want to hear what you think. Each year we receive money from the Federal Government to operate our Public Housing and to maintain it. One of the things that HUD is requiring us to do, and that's what we need your input on, is a five year plan for how to spend this money, a 5-year Modernization Plan. Over the next five years we are going to be receiving amount half a million, up to \$600,000 per year, to update our properties.

Mary Lewis: I can give you two good ideas right now. The doors leading into this community room, there in the hallway, those brown protectors on the bottom should be on doors leading to the apartments.

Sharon O'Hare: Half a million dollars each year to spend, but then also out of that has to come all of our maintenance employees salaries, a portion of my salary, our maintenance supervisor's salary. The other thing that is going to happen is that because we're selling some Public Housing units and having yet replaced those units, we are going to be losing some of the subsidy that we have been receiving, because our subsidy is based on the number of Public Housing units we have in operation. When you come to the sixth column on the first sheet I gave you, "Remaining for Modernization, next year we have \$300,000 because we haven't quite lost the subsidy when selling the units. The following years, it drops down to about \$230,000 to \$240,000, and then it will go back up as we replace those Public Housing units. You can see that we start with about half a million, we have \$200,000 that comes right off the top in terms some of our employee salaries, some of our

computers, trucks, maintenance trucks, maintenance tools.

Christine Greenwood: I have a question. That figure of \$1,596, is that what you use per unit or do you spend different amounts per different units, depending on the needs?

Sharon O'Hare: That's exactly what we're talking about today. That's a really good question. What this amount is, this the amount that HUD has given us on an average to modernize each unit. So they've given us \$1600, then it drops down to \$1400, per year to maintain a Public Housing unit. Remember, the thing about HUD is, they don't distinguish in the formula for giving us money whether it's a tri-plex at Pullman or a single family up on Artemos. We get money based on how many Public Housing rental units we have. One unit in Ventura receives as much money from HUD for maintenance as one single family home. What's obvious is there is a big discrepancy between how much it takes for us to maintain a single family home. That's what the next page covers. This is what we get. We will start talking about what we think we need.

What my job is, is to look at all of the systems in Vantage Villa, look at all the Public Housing systems, and go okay, we're being responsible for five years with our money, how long can you expect carpeting to last. How long can we expect roofing to last. How long can we expect cabinets to last. The plan is replacing those on a certain cycle and we have to budget how much money it is going to take to replace it, and then figure out the yearly cost.

The first thing we have to do is maintain what we have before you talk about improving anything or adding a playground. We have to make sure that the housing is safe and sanitary. So well it would be great to think about putting in garages or covered decks, while we can do things like that if we have extra money, first and foremost is spending the money is on maintaining the basic systems.

Going down that list, here are the things that we have to budget for. On the outside of the building we've got the parking lot that has to be maintained, we have site furniture and lighting, sidewalks, curbs and gutters, landscaping. On the outside of the building we have roofing, siding, windows, doors, sliding doors. Inside we have heating systems, which is a baseboard heating system. We would like to put a fire sprinkler system in, although we're not required to do. We have cabinets/countertops. Most of the units here in Vantage Villa have the same carpet. And then there are the appliances. You can see some of the elements are the same, whether it's Vantage Villa or a single family home, but some are very different. When you take the number of units, how long it's going to last, you average out the cost to modernize each one of the elements at an average cost per year, you can see that our cost per unit to maintain and keep modern the unit within Vantage Villa is around \$1100 per year, at a total of \$41,600 a year. Just to maintain, without doing any major improvements or upgrading, just to replace stuff as it wears out, we have to budget \$41,600 per year for Vantage Villa.

What we're doing is just letting you know for you, Joe, you came in late, we are looking at how our five year budget for modernization is allocated and what we need to spend the money on. The second half of what we'll do today is talk about if we have any left over money, what are the things we should be spending our money on. Any questions on how I came up with that?

Joe Gyles: I have a question. Modernization, please define it for me.

Sharon O'Hare: That's a good question because modernization is a term that HUD uses, and that's the way they

define the money. It's money that they gave us to keep the units modern, which means to keep maintaining roofs as they wear out, carpeting. All those elements here. This is money that we receive to maintain and update Public Housing units. We're talking strictly about the properties the Housing Authority owns that are Public Housing units.

Joe Gyles: You talk about upkeep, just to keep everything current and working.

Sharon O'Hare: Right.

Joe Gyles: You are not talking about improvements.

Sharon O'Hare: What we're talking about is keeping it modern, or keeping it current. Replacing the stuff that gets old and wears out with new stuff. On one of the handouts they call it a yearly modernization replacement only schedule. In other words, we're not adding to the value of the property. For multifamily sites we're not adding such as a swimming pool. In some Public Housing projects there are swimming pools. In Florida and California, there are Public Housing properties, multifamily, that have swimming pools.

In terms of our Public Housing properties, the way that we have to plan for it, we really have three types of Public Housing properties. We have Vantage Villa, which is the only building that we own that has lots of apartments in it. It's a 38 unit building, everything is a one bedroom apartment, on one site. We have our multifamily sites, which is the next thing that we're looking at. We have buildings that are 4-plexes, 6-plexes, 3-plexes, on sites scattered throughout. On one site there may be three buildings. Pulman, for example. On the Charlo site, there are two buildings there. The final type of property that we own is single family housing. Here is what we think it costs to maintain, to just keep our head above water, our multifamily properties. We've got the same stuff that we had for Vantage Villa. We're trying within the Agency to go with replacing all of our siding with vinyl siding.

Joe Gyles: You will get a lot more years out of it.

Sharon O'Hare: Yes. You get a lot more years out of the vinyl siding, and you don't have to paint it. The idea is that although it's a more expensive investment initially, in the long run the pay back is much better than if you have to continually go back and repaint. If you will notice on the previous page where we talk about Vantage Villa, we do allow \$70,000 for replacing all of the siding here with vinyl siding. All of our multifamily properties we operate each unit has its own boiler and a baseboard radiant heat. It looks like we have baseboard, but that's hot water going through them.

Christy Odum: Is that baseboard heated by gas or electric?

Sharon O'Hare: Gas. If you take all of this, our average cost to modernize is an average cost per year--for all of our 86 multifamily units--we need \$102,000, almost \$103,000, per year just to maintain, just to keep them up. And that cost per unit is around \$1200 per unit. You can see that one thing that happens is that when you go from the one building site to a multifamily site, the cost goes up just a little bit in terms of the cost of maintaining. Not very much, though, but it still just a little more expensive to maintain these scattered site properties than it is to maintain just one building.

Joe Gyles: But the quality of life goes way up.

Sharon O'Hare: What I find very compelling is the last page, which is the page that has to do with single family properties. First of all, this was done assuming that we have already sold the 45 single family houses that we're going to sell. This is just looking at what it costs for us to maintain our remaining 41 units. Our whole reason for selling the single family units in the first place was that it's more expensive to maintain these things. We have these big garages, we have big lawns. We have big roofs. And if you look at the actual costs, and you get to the bottom, you see that instead of \$1,000, \$1,100 or \$1,200, it's \$1,700 per unit to maintain a single family home. What has ended up happening, and those of you who live in multifamily properties have seen this, it has been so expensive over the years to maintain the single family homes, that in effect we have stolen money away from the multifamily properties. Money that could have gone just to maintain. What we have now is a situation where some of our multifamily properties desperately need new flooring. In Vantage Villa, a lot of residents are crying for new carpeting. We have multifamily properties that need new countertops and new sinks. We haven't been able to do that because what happens that when we look at all the money, we're in one of those non-optional things. When the roof starts leaking and it's at the end of its useful life, you can't do anything but re-roof. The same is true, of course, with the heating system and appliances. Some of the more optional things that are more aesthetic, like cabinets and countertops, and floor coverings, we put that off for a while.

When you get to the very end of it, you find out that to own and operate a single family unit costs the Housing Authority 60% more than if it's a multifamily property.

Mary Lewis: In a building like this, you're going to get longer use out of the counters, because one person is using it. When you have a family, have children, that is something else for wear and tear on things.

Sharon O'Hare: That's a good point. The single family, the floor coverings, appliances and the cabinets have a shorter life if it's a family situation than if it's a senior or somebody with disability. Heaviness of use is a big factor.

Mary Lewis: Like in the apartment I'm in, the countertop, even for as old as it is now, is in very good condition. There's nothing wrong with that counter except where some previous people, instead of using a cutting board, went and cut on the stuff. Silly stuff.

Sharon O'Hare: You have different degrees of use. Are there any other questions or comments on how we start out with half a million.

Joe Gyles: I'm assuming that if you sold the 45 single units, and you have 41 left, is the plan to slowly phase them out, because they're expensive.

Sharon O'Hare: The Board has not made that decision yet. It hasn't really been brought forward to them as a proposal. There are a couple of different arguments. I'm the person charged with managing our assets and managing our cash flow when it comes to how to spend this money. Looking at this strictly from a cash flow money standpoint, this to me is very compelling. It makes a strong case for the idea that not only is it more expensive to operate single family properties than multifamily, but if you go back to that first page where you look at how much money we get per year from HUD on average, we're running in a \$200 per unit deficit for the single family homes. We don't get enough money from HUD to justify owning the single family homes and to operate them. What happens is, we're borrowing or taking money away that could go to Vantage Villa or our scattered site multifamily properties where we don't have the site lighting that we should have, we don't have the tot lots that we want to have out there. What happens is, as a manager you look at, okay, there's a house up on the hill, a single family house, and it needs a new roof and we have money that was designated to put in a tot lot over at Pullman, what happens is,

Pullman doesn't get the tot lot, and you take that \$3500 and you put a roof on one house that ends up benefiting one family. And that's just what we have to do because of the life safety issues. I think this makes a very strong case for the Housing Authority, as you said, Joe, phasing out our ownership of single family properties.

Joe Gyles: It's not a very popular stand.

Sharon O'Hare: With one exception, though. One of the things is that if a family needs more than three bedrooms, if it's a four or five bedroom household, it's almost easier, I think, to operate those--in other words, you don't want to build a large new Public Housing that's four or five bedroom. You're almost better off just maintaining maybe five properties that are four bedrooms or four or five bedrooms, something like that. It ends up a very crowded site, and I think we've talked about some of the challenges of the managing tool. For example, a property that has lots of four bedrooms, as well as three and two bedrooms, it becomes too concentrated. There are also other ways around that problem. That's our final year modernization, and I put that in quotes because it really is more like keeping our head above water program. Let's look at decent, safe and sanitary.

Christine Greenwood: I'm not sure I mean what decent means. Does the word decent refer to the type of the clientele that live there, or does it refer to the structure.

Paula: Decent means it's moderate, and suitable for tenants.

Sharon O'Hare: Next month at your meeting the community room--

Joe Gyles: Is there a meeting next month?

Sharon O'Hare: There is one more meeting next month. This part of the community room is the tenants part. This part is still the Housing Authority's part that we need to us, but that part is going to be the residents part.

Finally, the last thing we have is to look at our replacement budget, what it costs to operate each of these three different types of properties, and look at our capital fund budget after you take out money for the maintenance salaries and staff salaries, computers, and things like that, you find that the balance is not a lot of left over money. We have about \$22,000 and that's probably what it would be each year. If we sell all the single family homes at some point and replacing--one of the things about replacing old stuff with new stuff, your maintenance costs go way down. You're starting off with vinyl siding. You have a 30 year roof on there. You've got new appliances. So you don't need to spend as much every year on those new properties, at least not initially, which means you have more money available to upgrade your older properties. That is something else we are looking at from the asset management perspective. What I would like to spend the rest of our time with is talking about what you would like to see us doing with these capital fund monies. I don't know if I'm hearing a consensus on whether these should be going on to a single family properties or not. That was a question that was brought up. And what are we missing on our multifamily sites that we should be have.

Christine Greenwood: I would like a swimming pool. One thing about swimming pools is that in California and Florida, they are probably very cheap to maintain and all that stuff and they're used year-round. And here we would use them little.

Sharon O'Hare: I can tell you that that will never be a consideration.

Christine Greenwood: I'm just defending the fact it's a serious thing there and I don't think they think of it as frivolous in California. I really don't. I mean, it's a part of their way of life. We might think it's frivolous here, but I don't think they think that way there.

Sharon O'Hare: I know one thing that you see in Public Housing in warmer climates, is, for example, there is more money spent on outdoor amenities because they can spend more time outdoors, so it makes more sense to put in a massive tot lot. There is money too that is spent on air conditioning, because that's not a luxury there. That's a necessity.

Christine Greenwood: The last couple of summers you see more and more air conditioning here, especially with the air problems and so forth. If the summers are going to continue to be one hundred degree summers with lots of forest fires, air conditioning might be a consideration, especially with older people or people that have respiratory problems.

Sharon O'Hare: That's one thing in this facility here, there is air conditioning.

Mary Lewis: There isn't in the apartments. We leave the sliding patio doors open.

Sharon O'Hare: So air conditioning is a possibility. What about dishwashers?

Joe Gyles: What about them?

Sharon O'Hare: No? Okay. What do you think about improvements we might make to make units more energy efficient or thermally efficient?

Christine Greenwood: That's a good idea.

Mary Lewis: How about sliding glass windows? The wind blows right between where the panes meet.

Christine Greenwood: Are the refrigerators frost free or are the kind you have to defrost.

?? : The first winter I lived here, the last thing on earth I thought I would ever need is a snow shovel for my carpet. The snow had blown in here just about that deep below that door.

Sharon O'Hare: If you go back and look at the sheet, for Vantage Villa we have sliding doors, we have money budgeted in there to over time replace the windows and the sliding doors. One of the challenges that we face is that we're sort of operating in arrears. We're already behind. We would ideally have three times as much money next year that we could spend to kind of catch us up to where we need to be.

Mary Lewis: Is there something that would be more efficient than those sliding glass doors?

Christine Greenwood: Well, yeah, anything would be more efficient, just one door or a wall.

Sharon O'Hare: If you want to be brutal about it, the most efficient thing to do is to get rid of them and put in an insulated wall.

Mary Lewis: What about an insulated door and get rid of the glass.

??: I wouldn't object to a wall there as long as there was no window in it.

Sharon O'Hare: Once you have a window in it, anytime you have a penetration, that's how you get air.

Terry: We need an exercise yard so we can all be let out once a day.

Sharon O'Hare: One thing to look at, and I'm not particularly concerned about it, but I know this group is because we've talked about it before, in July of 2002 we can all expect to see our electricity rates--bills--triple. If you get both your gas and electricity from Montana Power, your whole bill will triple. But that portion of your bill that's allocated to electricity will automatically triple.

Mary Lewis: That's going to be a real big problem for you. What do you do with us? Like say here, okay, the utilities are paid, but you're going to have raise the scale of the rent.

Sharon O'Hare: Actually, we will not be allowed to raise the scale of the rent. That will remain fixed. What will happen--

Mary Lewis: We'll have to really try to have people save electricity.

Sharon O'Hare: Here's what will happen for places like Vantage Villa. The rents won't go up. If we're lucky, HUD and the Federal Government will act fast enough to give us more money for our utility allowance so we get more subsidy. Remember that \$22,000. Maybe we'll use that money to pay for it. The other problem is, Vantage Villa is all electric baseboard heat. We know there's a lot more efficient ways. If we went to a natural gas system. But we would have to bring natural gas to the property, we'd have to pipe it in, we'd have to go to a boiler system. We're talking about probably a half million dollars to \$700,000 conversion cost. Our hands are somewhat tied in terms of what our options are. The other thing we talked about that I think is an option, is something called demand site management where each of the units would have a meter, even though the Housing Authority pays all the bills. We could tell who is leaving their windows open and using three times as much electricity as everybody else, so there may be some steps put in place to encourage or require conservation of energy.

Tola Denny: What about the blinds that go up and down?

Sharon O'Hare: The horizontal blinds or the vertical?

Tola Denny: The vertical. In the summertime when you're talking about the heat, have those so they wouldn't totally cut out the light.

Sharon O'Hare: I'm a no drape person. I hate drapes. They are source of smoke and pollution and dust and germs and they're nasty. And every time we go to clean them it costs us more than the drapes themselves, and they're yucky. Anyway, so every unit now that we're turning over, we are replacing the drapes with vertical or horizontal blinds. That's a new thing since I came on board.

(Discussion was had by those present concerning the advantages of blinds, insulated drapes.)

Christine Greenwood: I agree with everything you said, but in the winter sometimes they are good in that they help keep the heat in.

Joe Gyles: Drapes are bad.

Sharon O'Hare: What else should we be spending our money on?

Christine Greenwood: What about security? I just wonder about--it's still considered a low crime area and all, but there is a lot going on here that we don't hear about on the news, like the person that confronted the women in the Osco parking lot with a gun. That isn't widely talked about. We don't like to think we have crime in this community. I'm very careful to lock my doors, but I don't live in Public Housing, I'm Section 8. But I still don't feel like I have enough security there. I don't have a peephole in my door to look out and see people.

Sharon O'Hare: If you lived in Public Housing you would. Certain types of fencing are a

deterrent. I also think site amenities in some ways are a help. If a place looks like it's well-maintained, kept up and landscaped, and all those kinds of things, it's less likely to be a target than if it's run down. So those of some of the more subtle things for security, but you're right. The site lighting, in particular, is an issue with us.

Paula: I'm not a tenant, but one of the things when I went into an apartment, was washers and dryers. Have they been updated?

(Discussion concerning the washers in the laundry at Vintage Villa.)

Sharon O'Hare: So what do we have here?

?? : We have two washers and two dryers and the dryers have not worked well for probably the past five years.

Sharon O'Hare: So when we look at that \$22,000 that we have left over, and if you look at Vantage Villa's cut, Vantage Villa gets about 20%, let's say, of whatever we have. So \$5,000, so you would be suggesting that this year we take the \$5,000 and replace the washers and dryers.

What about tot lots, playgrounds for kids? Where are they on the wish list?

Mary Lewis: I think they should be way at the top. Sometimes the problem with Public Housing, you need for play areas for children because they start going into other multifamily units' yards where they don't belong. Then there's a problem there. But having a good play area that is safe, equipment and everything.

Sharon O'Hare: One thing we don't have at all are hoop sites, places where older kids can go out and shoot basketball. I'm talking about something different from the swing sets and stuff for the toddlers.

Mary Lewis: Or put up a place with a volley ball net or something like that.

Tola Denny: What about the sprinkler systems?

Sharon O'Hare: For irrigation? In the multifamily sites, they are already irrigated. If it's single family, they are not.

Mary Lewis: Are the sprinklers set up on some type of schedule where even if the grass turns brown. If it turns out being really hot outside like last summer, days on end, you can only water so much and that's going to be it, and the grass brown or not.

Sharon O'Hare: We water that area. I know they're set up to do it at the times when it's most efficient, and on the days that we're allowed to do it. We are restricted. Anything else?

Christine Greenwood: I just want to make a little point about dishwashers. I know everybody's against them, the feeling I got because they're frivolous. But they actually really increase the sanitation of the kitchen a lot. It keeps the dishes from being piled up in the sink and getting stinky and not getting washed. To me, it seems like all the convenient kitchens have dishwashers.

Sharon O'Hare: Frequent dishwashing, whether it's a human being or a machine--

Terry: You have to understand I'm speaking the point of view of one person and a cat.

Sharon O'Hare: So maybe it's appropriate to think about dishwashers in family housing.

Christine Greenwood: It seems it's easier to kids to get in there and load the dishwasher faster than getting them in there to wash the dishes.

Sharon O'Hare: We're designing our offices, and one of the things that I insisted on, or one of our Staff asked me, our Staff is continually subject to all winter and spring, somebody has a cold, somebody has the flu. We see so many different people with so many different germ sets, and particularly our Section 8 housing folks we see the most, are the ones that are sickest the most. We are putting a dishwasher in our new office just so we can wash out the coffee cups and things like that.

We're coming to the end of not only today, but the end of reviewing the plan. Next month, besides giving the eye over our new furniture, what we're going to do is each department is going to come in and present what they're planning on doing new or adding to their program for the coming year, and will be interested in hearing what your comments are on that. After that, we will be ready to go public with our next one year agency plan, and your work will be done for a while.

?? : Russell Square?

Sharon O'Hare: We are doing a lot of things other than the Russell Square project. We are doing a Section 8 program where you can use your voucher to qualify for home ownership purposes.

The meeting was concluded.

**MISSOULA HOUSING AUTHORITY
RESIDENT ADVISORY BOARD MEETING
MINUTES**

February 7, 2001

A meeting of the Interim Advisory Board was called to order by Sharon O'Hare.

IN ATTENDANCE

Staff: Sharon O'Hare, Paula Garland, Tom Chapman, Lori Davidson

Residents: Christine Greenwood, Terri Loftis, Christy Odum, Debbie Ham, Mary Lewis, Lorena Perkins, Candice Wall, Jacquie Peres, Maren Christensen, Tom Chapman, Michelle Hoppe, Christina ?, Joe Gyles

Sharon O'Hare: We will briefly review what we did last month. One of the things that happened is, we finally got directions from HUD as to the purpose of the Resident Advisory Board. The purpose is to help the Housing Authorities Staff put together a one year agency plan and the five year agency plan. I think we focused mostly last month on reviewing the agency goals and the activities associated with each goal. One of the things you as a group asked for and I shall deliver, a slide show of the Public Housing properties so you would know what we are talking about. This is Tom Chapman. He is Assistant Public Housing Manager.

We ran out of time last month and we didn't get through all of the goals, so I asked you as a homework assignment, because your comments will be incorporated into the one year agency plan each year. It states Resident Advisory Board Comments. The comments that you submit on what we're doing as an Agency, the things you actually say because we recorded this, that will be part of the Agency plan. I asked you to take that plan home and review it, and if you had comments to please write down your comments on what you thought we ought to be doing.

We will start this meeting with the slide show.

Maren Christensen: Did we come up with the by-laws?

Sharon O'Hare: HUD suspended that requirement that we need by-laws, so we just moved on. It specified that the mission be explicit and took away the need for by-laws and incorporation.

Tom Chapman: [Presented public housing slide show.]

Sharon O'Hare: I will comment on the slides as appropriate. This is Toole and Toole is one of our multifamily sites that is probably densest in terms of the most number of people that occupy that site. That is because we have several three and four bedroom units at that Toole site. One of the Housing Authority's plans is in the next couple of years to take Toole and find other housing for the people that are living there, if necessary, and change that from three and four bedroom units to two and three bedroom units. What will happen is, that will reduce the number of children that live on that site, which is probably a good thing. With three and four bedroom units, the children are all in the same small space.

Maren Christensen: Was there any follow up on the zoning so as to be commercial?

Sharon O'Hare: We will look at the feasibility of that. It could turn out with Toole that we would be better off selling the property and building a new two and three bedroom multifamily at a different location. Toole is in a part of town that is developing into commercial.

Tom Chapman: This is Russell Park.

Sharon O'Hare: Russell Park is across from the YMCA and is close to where our offices are going to be.

Tom Chapman: We have four or five houses over there, and 41 through 50 of this apartment complex, and 5 through 9 on the other side. This is Charlo. (Continued showing multifamily unit slides, with common yards, storage facilities, common areas, and playgrounds)

Sharon O'Hare: We have 210 units of Public Housing. Some of that is in multifamily housing which we looked at, and some of it is in single family housing.

(Showed River Ridge and Parkside, and explained the tax credit, partnership, and how the Housing Authority is involved and after 20 years the Housing Authority will be able to purchase them.)

Sharon O'Hare: What do you think about the chainlink fences?

Joe Gyles: The maintenance, is very hard to mow around them.

Christine Greenwood: There is a greater sense of security with a fence.

Sharon O'Hare: We have shown you most of the multifamily units, and that is the direction that the Housing Authority would like to go. Next session I'll show you some slides of what we're proposing to do. Now what I want to do is show you the direction we're moving away from, and that is our sale and replacement housing. You have probably all heard about the 45 units of Public Housing that we have permission to sell from HUD and except for a couple of exceptions, they are all large, expensive to maintain, three and four bedroom single family homes. We will now show you the single family that as a Housing Authority we decided it was too inefficient to continue to operate them. What we want to do is take the proceeds from the sale of the 45 homes and in turn create housing for 81 families. We think it's a win-win situation, except for the families that are having to leave the homes that they now live in and relocate them either through the Section 8 program or into another Public Housing unit.

(Showed slides of the Public Housing sale and replacement units, explaining the problem with the large yards, the large decks, maintenance problems, replacing roofs, and the expense of maintaining the single family homes.)

Joe Gyles: **How many have been sold?**

Sharon O'Hare: They are not all on the market yet. The way we are doing the sale and replacement, HUD gave us permission to sell in August. In our schedule for sale, had said we were not going to relocate any of the families during the school year, unless they wanted to relocate. The way they would be relocated would be to go into the Section 8 program or another Public Housing unit. We let the sale and replacement families know our plans. Ten families so far have chosen to relocate before the end of the school year, either are moving to another state, another town, or into the Section 8 program finding something they liked. Once the family moves out, then we list the property. We have one that officially sold yesterday, I believe. We have one that will sell tomorrow. We are expecting that within the next couple of months to have ten sell. The bulk of them, though, probably will not go on the market until August of this year. We hired Shannon Parker as Housing Search Advocate, and she helps these families find a place to live.

Those are some of our single family units. Are there any comments specifically on our sale and replacement?

Introduced Lori Davidson.

Lorena Perkins: **I think everything looks good. You can get places fixed up.**

Sharon O'Hare: I think the key point, the decision to sell all the single family homes, is that it's so inefficient for us to operate and maintain these big single family homes. We can do more with what we have if we become more efficient in terms of the type of housing that we have.

Christine Greenwood: The goal basically is to help more families on the waiting list, and get those people served faster.

Sharon O'Hare: Exactly.

Lori Davidson: We will still have 40 single family dwellings. We are not getting rid of all of them. This is just about half of the single family units that we own.

Sharon O'Hare: It is possible that we will take a look at another sale and replacement in a couple of years, as continue changing over. They will never go away, but it is more efficient to operate multifamily than single family. That's the nature of the economics.

Mary Lewis: I'm being selfish here, like here at Vantage Villa, is it possible as part of the maintenance thing that you end up doing like getting those trellises out and getting them fixed or new ones put up. Those things are a wreck around the whole house.

Sharon O'Hare: What we've been talking about is why we haven't been able to do things to the multifamily properties that we have wanted to do. Fix up the trellises and all that, because that is a design and decorative thing. Instead, we've had to focusing on the single family houses that need a new roof. It's a health/safety issue. We should have more money and be able to update everything that we have if we can get rid of the single family maintenance costs.

Let's continue looking at the goals and specific activities that we didn't cover at the last meeting. Let's go to the next to the last page of your handout, and these were the goals we were supposed to accomplish this year. For the most part, we accomplished everything that we said we were going to for the year 2000, with the exception we didn't get an affordable housing grant for \$262,000, which was a big disappointment to us. We haven't yet constructed our office and shop as part of the Russell Square, we will do that this year.

??? : I have a question on that. Why do you need to build new stuff?

Sharon O'Hare: Why we need to build new offices?

???: Yeah.

Sharon O'Hare: We have outgrown our space here. We don't have enough space to have our offices here, plus we are really far flung from the center of town by coming out here. There is not office space available in town that can meet our needs. One of our biggest needs is for parking, because we have so many orientations and meetings like this one, and clients. We need to be centrally located and we need to have parking. The third reason why we're building new offices, we can piggy back the new offices on apartments for

seniors and families. In essence, we can get part of the subsidy from our tax credits to pay for and support the development of our new offices.

???: It will not only be more efficient but have new apartments too?

Sharon O'Hare: Yes.

Lori Davidson: The other reason that we wanted new space, the maintenance department currently has three locations where they have inventory and tools. There is one on Sussex, there is one in the Foothills, and there is one on Toole Avenue. The maintenance guys have to go from one end of town to the other to get the things they need, such as to go fix a place out in Lolo. In a large area, they will be able to have on-site inventory. They will be able to pick up their truck, pick up their tools and materials, and they are off.

Sharon O'Hare: Our new location is the vacant area directly north of the new Albertson's at the intersection of 39th and Russell. It's right on the bus line.

Christine Greenwood: How many units are going to be there?

Sharon O'Hare: 52 units. Two different developments. On one parcel will be small families and the other parcel will be seniors only. That is the parcel that will also contain our offices. We're meeting with the architect tomorrow and we hope it will go out to bid within a month.

Turn to the next page, the Shelter Plus Care program activities. What we really want to look at is what we plan for the next five years. We want to hear from you, in terms of our goals, what should we be doing. We said we wanted to create more transitional housing. We wanted to sell our 45 units of Public Housing. I haven't really heard anyone say that's a bad idea. We've got two parcels of land that we are going to be developing as multifamily sites to replace the Public Housing that we sell.

Maren Christensen: Which are the two sites?

Sharon O'Hare: One is going to have 12 units and the other is going to have 16.

Tola Denny: What are the unit size?

Sharon O'Hare: They will be one and two bedrooms. We're playing catch up on our waiting list. We're taking the money that we get from the sale of 3 and 4 bedroom houses and going to develop multifamily townhouses. These two sites will enable to develop 28 units.

Tola Denny: Are you going to develop some larger units?

Sharon O'Hare: That is something that I think we need to take a look at. I'd think we might build a couple of three bedroom multifamily units.

Tola Denny: Getting rid of all of the three and four bedroom units, there might be a need for some.

Sharon O'Hare: We're still out of balance. Here's the waiting list for three and four bedroom units. Here's the waiting list for one and two bedrooms. When we sell the three and four bedroom units, we want to try to get them to equal out in terms of the length of time you have to wait for Public Housing. Just on the face of it, it does not seem fair that if a single dad with two kids and need a two bedroom apartment, you've got to wait two years. If you're a family that has six kids and need a four bedroom, you may be able to get in within a month or two. On the face of that, it is not fair and equitable, and we're charged with being fair in the provision of housing, so everybody should have to wait the same amount of time, if you're eligible for housing.

Maren Christensen: Wasn't there some study concerning the housing needs in the Missoula County area on unit sizes?

Sharon O'Hare: That was for the City's Consolidated Plan, that they did a couple of years ago. In it, they looked at all the demographic projections for Missoula and said that in general our average household size is getting smaller, and the really big growth in household formation in older women living alone. It said, I believe, there will be 800 or more households of senior women living alone within the next five years. That's a function of the aging baby boomers and their parents.

Maren Christensen: Am I on the right page where it talks about transitional housing?

Sharon O'Hare: Lori, would you like to explain that.

Lori Davidson: One of the things we need to distinguish is that the Housing Authority itself is probably not going to build transitional housing. The idea there that our Board has is that we will support transitional housing that other people already have one way or another, in any way that we can. The YWCA, the Joseph's Residence, the Mountain Home which is for teen moms, Share House. These are all transitional housing programs and they don't have enough space, and we'd like to be able to help them increase the number of units they have available to use in their transitional housing program. Just this month, HUD has given us a way that we think we might be able to do that. We have never before been able to take any of our houses and set them aside for a specific purpose, but HUD has now said if you do this right and you serve the populations that we want you to serve, we're going to let you take up to 20% of your vouchers and use them in a project-based manner, which means that rather than giving them to a tenant who can take them anywhere they want to use that voucher, that voucher will be tied to a building. When

a person who is living in that unit leaves, the voucher stays with the building and the new person coming in gets the benefit of that voucher. You can only subsidize 25% of the project. You can't do 100%. We have to go out into the community and look for people who want to be a part of this, because they have to commit to having those units always available for voucher holders and they have to meet our criteria. It's going to be a joint project between those people who already have transitional housing, and we will subsidize the rent that they will charge. For example, I was talking to Sally Mullen at the YWCA about this yesterday. They own six units and they rent some because they don't have enough money to buy enough units. They own six of them, and they charge rent at 30% of the person's income, and that is all the income that they get off of these units. If we were able to help them subsidize those units, they could charge a flat rate rent, just like any other landlord, and as long as it is reasonable, and in line with what anyone else in the community would charge for rent, their tenant will continue to pay 30% of their income for rent, but we'll pay a subsidy to them. That will give them more money for maintenance of buildings, and so on. It won't be enough to purchase another place, but they can use that other money in other ways rather than just maintaining the building. Put it into supportive services or renting other places so they have more units available.

Maren Christensen: And they work within the payment standards?

Lori Davidson: They have to work within the payment standards.

Maren Christensen: Is there a time limit to the vouchers or is it indefinite?

Lori Davidson: They are not specifically set aside for transitional housing. We're thinking that that would be the best use that we can make of this project based on an opportunity we've never had before. When you ask if there is a time limit on it, in the sense that after a year of having one of these project-based vouchers, if at the end of that year the person wanted to, you could trade that project-based voucher for a tenant-based voucher and they could move out and still have a voucher. We would have to have one available to give to them, but the project-based voucher would be available for another person coming in. That's sort of why it lends itself to transitional housing, because those programs generally run from six months to 18 months.

Tola Denny: Were you saying HUD said we could 20% of your funds in these special projects, or if you take part of that special project you can only plug in 20%.

Lori Davidson: It's actually tied to the number of vouchers rather than actual funding. They're saying that we can use up to 20% of the number of vouchers you have allocated. For example, we have about 600 vouchers, so we would be able 120 of those and tie them to projects. I don't know if we want to do 120, I don't think we even have 120 transitional housing units.

They're saying that's a maximum--it's not a maximum, it's the ones that we already have, and we can take part of those and say these are not tenant-based anymore, we're going to target them to this particular project.

?? : Basically it would make it an admission policy.

Lori Davidson: What we're saying is those people would be given priority for rentals without going through the waiting list, because the project is going to determine who gets the vouchers.

Joe Gyles: I want to back up a page and look at tenant community service requirements. Can we have a little clarification on that?

Sharon O'Hare: I will tell you as much as I know about it and then I'm going to turn it over to either Tom or Lori to do the rest. Two years ago when Congress passed what we're calling QHWRA, Quality Housing Work Responsibility Act, there were these broad sweeping changes to how Public Housing and Section 8 vouchers are managed and administered. One of the things that Congress said is that you shall have tenants who are not either disabled or seniors, who are over 18 years old, to volunteer.

Joe Gyles: So you're telling me that this another Federal string attached through HUD.

Sharon O'Hare: Yes.

Lori Davidson: It's a very small string, though, because it applies to a very small number of people. If you're a senior or you're disabled, you're exempt from it. If you're working, it doesn't apply to you. If you are in an educational program, it doesn't apply to you. So the only people that will be subject to eight hours a month of community service are able-bodied, younger persons who are not in any kind of educational program, or who are not working.

Joe Gyles: What I object to is that it is a string attached.

Lori Davidson: And you can imagine how we feel about having to supervise it.

Christina: What bothers me is, is it my house to live in or is it my house as long as I put in eight hours a month?

Sharon O'Hare: It's your house, but as part of your lease agreement you have to agree to our inspections, and you have to agree to pay your rent at a certain time, and now you have to agree if you're not eligible for any of the exemptions that Lori talked about, you have to agree to eight hours of community service a month. In other words, the string is attached.

Maren Christensen: Is this strictly for Public Housing or is it also the Section 8.

Lori Davidson: It's just Public Housing.

Maren Christensen: What if you have someone who is in training and they're doing independent work wherever possible.

Lori Davidson: That counts.

Sharon O'Hare: For anyone that is in Public Housing, coming to these meetings counts.

Maren Christensen: I still have a problem with this thing. Single parents who have children under school age, it seems to me taking care of your children is a valuable community service.

Sharon O'Hare: I agree. I do believe, though, they're not just operating on the periphery. Each Housing Authority gets to make their own definition of how this thing will be carried out, and from what I hear and understand, our definition and our requirements are extremely generous.

Joe Gyles: I'm looking at the section for asset management. Whose assets?

Sharon O'hare: Housing Authority assets, not yours. Asset management taking care of our properties. The big thing we're doing right now is the sale and replacement. Selling those assets and in turn replacing them with more efficient assets. That's asset management.

Maren Christensen: When will the community service be implemented?

Lori Davidson: When you sign a new lease, which everybody will be asked to sign as they go through that annually.

Sharon O'Hare: We're coming up to the end of the hour. Are there any more comments? Is there anything else that anybody wants to talk about before we adjourn.

Maren Christensen: I saw the FSS Coordinator and there was no funding for that, and I thought there was--

Sharon O'Hare: We did get that. That's not a problem. A year ago when we did this plan, and what you're looking at is a plan that we did a year ago, we thought we were going to have to look for alternative funding.

Lori Davidson: They renewed it and every indication is they are going to continue to renew it. Of course, we have a new administration now, so we're not making any promises.

Maren Christensen: Did the Board meet yet and have decided if they're going to do FSS towards home ownership?

Sharon O'Hare: I believe they're going to do that at their February Board meeting.

Lori Davidson: It's not just specific to FSS either. It's open to all voucher holders.

Sharon O'Hare: The next meeting is a month from now, March 7. Same time, same place. At the next meeting we will try to get your familiar with what we're talking about regarding the plans, and you will get a chance to look at what Staff comes up with for our activities for the proposed coming year. I'm hoping to be able to send that to you in advance when we send out your notice of the meeting.

The meeting was concluded.

**MISSOULA HOUSING AUTHORITY
RESIDENT ADVISORY BOARD MEETING
MINUTES**

January 10, 2001

A meeting of the Interim Advisory Board was called to order by Sharon O'Hare.

IN ATTENDANCE

Staff: Sharon O'Hare, Paula Garland, Ed Mayer/Director

**Residents: Terri Loftis, Christy Odum, Debbie Ham, Mary Lewis
Jacquie Peres, Michelle Hoppe, Sandra Young, Joe Gyles
Lorena Perkins, Candice Wall, Christina Witt,
Theresa D'Angelo-Gunderson, Melissa Blue**

Sharon O'Hare: I want to welcome you to our Resident Advisory Board Meeting. We do have one other person who I know will be joining us. We'll go ahead and talk a little bit about what we're doing today and the next couple of months. Most of you, if not all of you, have received our five year plan that I sent you in the mail. In fact, the whole reason we have this Resident Advisory Board now is that the changes in the housing laws requires the Housing Authority to have a Resident Advisory Board that will help us--the Housing Authority Staff--put together a plan of action for one year and for five years. What kinds of things we should be doing here with the Housing Authority. We did that last year and some of you were on last year's Advisory Board. It was a smaller board and we had maybe four or five people that reviewed our plan. This year we've had more time to get our act together and HUD allows us a little more time, we're going to have you help us draft the plan for this year. Help us decide what kind of things we should be doing as an Agency and where our emphasis should be.

I sent you the five year plan so that if you wanted to, you could take a look at what we said last year we were going to be doing over the next five years, and at this meeting we can start getting new comments. HUD requires us to incorporate your comments into the plan. They want us to prove that we're looking to you and that we're conducting these meetings, and that we're giving you an opportunity to have some input in the direction that we take the Housing Authority. It is really important for us to have your comments.

This is Ed Mayer, our Executive Director, and I have asked him to come in and say a few words of welcome to our Resident Advisory Board.

Ed Mayer: For those of you who don't know who I am, I'm the Director here of the Authority. For those who do, hello again, and welcome back to another year of the Resident Advisory Board. You are important here to us. We are required every year to prepare a plan for HUD approval, a plan for how we operate the Housing Authority. It is very important to us that you, as our customers, our program participants, can tell us what you think, tell us what you want. Respond to what we think and respond to what we want, to where we can all work together. I appreciate your time here because you are all volunteers. I know it's very difficult for you to take yourselves away from whatever you do on a daily basis to come here and deal with what is sometimes complicated stuff. It's also very important, and I think it's important for you, as well as for us, to give you a better understanding of what we do and why we do it. It also gives you a better understanding of where you are in this whole picture. We really want to hear from you, and we want to have an equal discussion about where it is we are going as an agency, and how we serve the Community of Missoula, and make sure the programs we operate for you are being operated in a reasonable fashion, that they are hitting the target as we move down the road.

Last year was a very informative year. Last year we put together our first plan. It was a five year plan with a one year on the side of it. It was the first year we had ever done it with a Resident Advisory Board. The previous years the Housing Authority and the Board of Commissioners developed a strategic plan, but we had very little involvement of the program participants. This is why you are so important. This year should be easier than last year because we have last year's plan to work off. Sharon told me that you all had a copy of last year's plan and she has an agenda for how she would like to walk you through last year's plan, our goals and objectives. Just so you know, along side of the work you're going to be doing, I'm going to be working with our Board of Commissioners. Any of you are welcome to attend our Board of Commissioners meetings. They are open to the public. Our Board meets the third Tuesday of every month. We have a Board meeting next Tuesday at 1:00. You're welcome to attend. If you have anything you want to say to the Board there's a place for you say it. We're happy to hear from you. My Board will be going through the exact same process you're going through here with Sharon. The key to our work and the success of our work is bringing those two tracks together in the end. As we both travel down the tracks, we are going to providing feedback to each other. For example, my Board is going to take a look at this plan and say we think we need to do this, this and this. I'll take that list, I'll bring it here to you and you get to review that list and you get to say to my Board, we agree with you or no we don't. Likewise, you get to generate a list of things you think are important for us to do this next year, and they will look at your list and talk about it, and my Board will say yes, we agree here, or no we don't. The whole point is, by the end of this process which should be about March, we should all have a good idea of not only where we're going, but hopefully have some agreement that this is the way we're doing this and this is where we're going this year. I'm here just to introduce the process and to thank you very, very much for your participation. You're really a great help to us what you're doing here, and I can't thank you enough. You're all very, very important here and your opinion is very valuable. So, please, speak up and have a good conversation.

Two rules in working here. Listen well, make sure everyone has a turn to say what they need to say. You all share, and you are all a part of it. So it is very important to at least allow another person to talk and have their say. The other thing is, don't let any one person dominate. We all have to share your time. With those two things in mind you should do great. For those of you I haven't met, I hope to meet you by the end of this. Again, thank you very much.

Sharon O'Hare: While Ed was talking and welcoming you, I passed out the five year plan I sent to you - only with a couple of very important differences. One, at the top of the first page, it says "Resident Advisory Board" RAB

comments on the plan. There are a couple of lines above that that has you indicate whether you're a participant in the Public Housing program, the Section 8 program, or Shelter Plus Care program. If you could, please mark with an X which program participant you are, and then because I didn't put this program participant thing on each page, if you send this page back in and it's not attached to the other pages of comment, I'm not going to know later on whether it's Public Housing resident saying something. So, please keep your comments altogether.

Christy Odum: Do you want us to put our name on them?

Sharon O'Hare: If you want to, you may. If you do not want to, you do not have to. The only thing I would like to keep track of in terms of the comment is, which one of the three primary programs you represent here. The next thing I want to do is read over the Mission Statement, and then we have a list of our goals. I want to talk about the Mission Statement and then I want to move on and talk about Goal I. The whole idea for having these comment sections at the bottom is as you think of something you write it down. We're trying to work in a very short timeframe. We have an hour today and we need another meeting. As you think of a comment or "I think the Housing Authority should be doing this", write it down because there may not be time to talk about it in the room today, but we need it in writing and we can respond to it, and that's something I can carry forward to the Board, and inform them that we had an RAB meeting and this is what our representatives are saying.

Our Mission Statement "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." Pretty ambitious Mission Statement but also fairly specific. Any ideas or comments about that? Are we on the right track?

Christy Odum: I think you are on the right track and the very writing of that down reinforces the desires, to be upward mobile and participate in the process.

Mary Lewis: It doesn't isolate someone and makes no differences.

Sharon O'Hare: That's part of why the Mission Statement says what it says, because we're trying to be inclusionary rather than segregate people. Any other comments? Your comments are being recorded and will be transcribed, so your comments will also get recorded down.

My thinking is that it will probably take us two meetings to get through all six of our goals. The first goal, and this is the longest discussion, has to do with the housing programs that we operate. This goal says that we want to continue doing what we've always done. Operate our assisting housing programs for residents, program participants, and applicants, in an efficient, effective and equitable manner.

Here is a list of our guiding principles. These are not things that the Housing Authority. This is the philosophy under which we operate our activities. We own a lot of properties. The first one says that our work is founded on our property assets. The Missoula Housing Authority owns over 12 million dollars worth of residential property in this town that we operate as Public Housing. There are some Public Housing Authorities that operate only a Section 8 program and they don't own any property at all. So that's kind of an interesting thing to keep in mind, that not all Housing Authorities own Public Housing. That's not the Missoula Housing Authority. We figure our ability to stay in business and to provide the kind of housing to the number of people that we want is founded on the idea that we

need to hold onto our property, or we need to base our work in Public Housing and our property assets.

The second guiding principle is any new development that we do, and some of you may have heard that we are building new apartments over by the Albertson's at Russell Square, is going to be directed toward the creation of rental property rather than, for example, we could be creating housing for people for home ownership. Last year, and actually for a number of years, the Board has said that the Missoula Housing Authority is in the rental business, not the home ownership business, because within the community there are a lot of other nonprofit agencies that are working on home ownership programs. Our focus has been and this document says it will continue to be, doing rental housing. Does anyone have any thoughts on that?

Joe Gyles: Not if there are other agencies addressing that already.

Tola Denny: Yes there are, and there are a lot of them.

Joe Gyles: And for somebody my age buying a house, it's almost ridiculous.

Sharon O'Hare: My take on this is always that home ownership is not the appropriate way to hold properties for everybody. There is someone on talk radio, Bruce Edwards or Bruce Williams, he's a financial consultant, he listens to people call in and say, "I think I want to buy a house." And he's always saying, "You know, it's not necessarily true. You'd be better off paying off your credit card debt or building a savings account. You're a young professional" or "you're a senior" and "you don't want to have to take care of a yard or gutter."

Tola Denny: Does that mean you're not going to pursue purchasing using the Section 8 program?

Sharon O'Hare: That's a very good question and something we should talk about. For those of you that haven't heard of this, but with the Section 8 vouchers, you can use the Section 8 voucher as a certificate that works in the private rental market. It is sort of like food stamps. You can rent with a voucher that entitles you to a certain amount of credit in the rent. There is a new program, and I don't know if the Housing Authority is going to do this or not, that allows you to take that money, that voucher, and instead of paying it to a landlord you would pay it to a mortgage company, and this would enable you to purchase a home this way.

Joe Gyles: To build equity.

Sharon O'Hare: Right, you would be able to build equity and all that. The interesting thing about a Section 8 home ownership program, which may be the sticky thing about it, is that bankers take a look at your income when they're evaluating whether you qualify for a mortgage. Because a Section 8 voucher amounts can change based on your employment status, based on how many people are in your household, based on whether you come in for your recertifications, the amount you receive on a Section 8 voucher will not be regarded by bankers as a steady stream of income. It's not the same thing as a job. If the bankers aren't going to count that Section 8 voucher when you go in to be qualified for a loan, while you can use the money to help pay for housing, it's not going to help you qualify for that loan.

Melissa: The family self-sufficiency program is a similar concept, but it's kind of better in a way that it's longer and you have that mobility to put money in and to prove that you can get in a position that it will be

counted an asset. It can be counted as part of a down payment on a house.

Sharon O'Hare: That's exactly right. And some people may argue against doing a Section 8 home ownership program, saying that we already have a mechanism in place called the Family Self-Sufficiency program that allows you to accumulate a down payment while you're still in Section 8 or Public Housing. And that can be counted. A Section 8 voucher cannot be counted. Another thing about the Section 8 voucher home ownership program, it does have requirements that you have to work. You have to be employed 30 hours a week for one year at minimum wage in order to even be eligible. So if you're somebody who is not employed, you automatically don't qualify.

Melissa: I think the programs will complement each other, though. The FSS and the mortgage using Section 8 towards eventually self-sufficiency.

Mary Lewis: When you were talking about Russell Square, when you put those units in, and you said they'll be for rental, what area of population are you pointing towards?

Sharon O'Hare: The Russell Square Apartments, the 53 apartments that we're building, will not be Public Housing. They will be low to moderate income rental housing. In other words, if you have a Section 8 voucher, that's how you could live in the Russell Square Apartments. If you qualify for a Section 8 voucher, you can get on the waiting list and move into a Russell Square apartment. We will have one and two bedroom apartments. Half of the project is for small families, the two bedroom size. We also have four fully accessible units for people with disabilities. The other half of the project is for seniors only. It is actually Missoula Housing Authority's first time will act as a private landlord. It's not Public Housing.

Mary Lewis: How far along is that project?

Sharon O'Hare: We should be going out for bid in a month. Next month we can see what the plans look like. We'll make that a show and tell thing. I'll have the architect give us some elevations to show you. That is also where our new, expanded offices are going to be. We just hired a new person this week and have now three people in one office.

???: What's the commercial area for?

Sharon O'Hare: The commercial area in our project? The commercial area is our own offices. Albertson's is right there and there's a video store and a couple of other things.

Here is another one of our guiding principles. The rental housing that we develop is going to primarily serve populations that the private market isn't serving, which is primarily seniors, people with disabilities, and smaller households. I might take exception and want to talk about that for just a second. There's a long-time existing problem that if you're a family that needs four or five bedrooms or six bedrooms, you can't find a place to live. You can probably find some place for \$1500 a month, but you can't find something that's within your income area. I would think you might want to think about adding the words, and extremely large households. We do alright with the two bedroom folks, but when you get to the five and six, not that we need a whole lot of them, but for those that do need it.

Mary Lewis: Is there going to be any problem for Public Housing, where like some states like here deregulated the electricity, and Montana Power is going from that onto this Touch America and its optic fiber situation that's their future. And the BPA and they say there's all this shortage in California, and some people say there isn't. I heard on the news something absolutely just unbelievable, like natural gas and other things will go up as much fifty percent and fifty percent on electricity?

Sharon O'Hare: Is somebody not familiar with the deregulation? You can hardly avoid reading about it. I will tell you that my significant other works for Montana Power as an engineer in Butte. He is one of the people that is being reorganized into Touch America and all this sort of stuff, and it is a real problem, and it is a real crisis. Particularly in electricity, but also in terms of natural gas, in the State of Montana--I'm not sure why your bill would have gone up a hundred dollars, Teresa, because the residential rates have been frozen for two years. We're not supposed to experience deregulation and what will happen with prices for another year and a half. But the electricity cost for commercial businesses, like mills and places, that's deregulated and that's why the cost of electricity is four times as much for them. That's why you see so many mills and places closing, laying people off.

???: Will the plan include anything about the utilities deregulation.

Sharon O'Hare: Our electrical bill for this building where we have 38 people living here, is going to be incredible. We're not going to get any more money from HUD. If our money gets sucked up in utility costs, maybe we won't have money to fund the Social Services Coordinator, Dave Gentry's job. Maybe my job will go away. Aside from the fact that we wouldn't have these wonderful meetings any more, we also wouldn't have the money to build new housing developments.

The deregulation is something I don't think when the State Legislature--each state is deregulating on its own pace. What is happening is, those states that are going first, having to go on the free market, are competing with states that already have power fixed at a lower price. So Montana and California have to pay the highest prices around.

Mary Lewis: And there's not a lot of competition here either.

Sharon O'Hare: Not only is not that big a market, it's just like if you don't have enough corn one year, then farmers the next season can decide they're going to plant more corn and not as much wheat. So you may have a shortage of corn for six months, ten months. The problem with power plants is, it takes ten years to build one. So if you find out you have a shortage of power plants, you are not going to be able in the next year to have that much more supply available. It's going to take at least ten years to go through the process of building one. It's a very, very big problem that I don't think we're going to realize how awful it is until we all start getting those first deregulated bills and people are having to choose between eating and heating and medicine. A whole host of things. If the consensus is there, do we need to add that as a big concern for our ability to continue operating our existing housing programs, we add deregulation of utilities and how that will affect us.

We have another principal that talks about projects featuring mixed income levels shall receive strong consideration. The idea being that when we build a new development on our other sites, and we're going to build 8 to 12 units at a time, we don't want to have all of them have the lowest income people in them. There is some benefit in mixing. These are actually in our design standards, that we're going to building 8 to 12 units. In one of the TV shows, NYPD Blues or something, or a hospital in Chicago, and they have a public housing project in Chicago and it has maybe

20,000 families living in it, in 20 different buildings or 40 different buildings or something like that, and there's a move throughout Public Housing on a national basis, that that's not necessarily a healthy thing for any community to have that many folks together. The better idea is to go with scattered sites. In Missoula, the scale is way down. So instead of 120 people in two sites, we want to have 80 sites that have maybe three or four households living in them. That has sort of been our philosophy.

Lorena: What did we achieve last year?

Sharon O'Hare: In terms of new housing that we developed?

Lorena: Yes.

Sharon O'Hare: Nothing. We did not put in any new housing. The main thing that happened last year and it's kind of a catalyst for all the new development that we can do, we went through a year-long process to get permission from HUD to sell 45 of our Public Housing units. Some of you may have read about it in the paper or may have attended the meetings. It was a public-involved process. We had to appraise every unit. We had to develop plans for folks in terms of relocating them. That should generate about 4 million dollars when we sell them, and the people will go and live in other Public Housing or get Section 8 vouchers, that will generate 4 million dollars that we can use to reinvest in property assets, that we can create new housing with. Last year was devoted to shifting our assets and getting us through that process. We didn't create any new Public Housing, but we did get 165 Section 8 vouchers, and 45 from the sale of the housing. We now have over 200 more Section 8 vouchers. 200 more families that we can help. So if you want to think about our growth that way, that is something that we did.

Another thing that we looked at when we design, we need to find land and do new developments that are near necessary services and public amenities. We could tomorrow probably run up to way out in Miller Creek and buy some land and do a six-plex there. The problem with that is that our clients would be way up Miller Creek and there's no bus service, there's not a library, there's not a grocery store, there's not a post office. That is a community and there are a number of communities in Missoula that are very dependent upon cars to exist.

Joe Gyles: I want to back up to the higher density here.

Sharon O'Hare: Higher density for elderly and special needs.

Joe Gyles: That's not a good idea. Why put them together in the first place. You should spread them out a little more.

Terri Loftis: I was going to say something about that. I don't like living here for one reason. When people have their grandchildren here, some of the tenants just won't shut up about how noisy they were for two weeks. It makes you feel like your family is not welcome here. And I really think I would like to see somebody here who had one kid. I quite agree with that.

Sharon O'Hare: Not having senior only. Looking at this, and it may be that this is poorly worded from last year. When they're looking at higher density for elderly and special needs housing, I think the idea behind that statement was that usually when you're doing that housing, you're only doing one bedroom or two bedroom units, and you can get a higher density, meaning you can get more units per acre if you're doing one and two bedroom units than if you're doing bigger family housing. What do others think about this? Should we be doing just special needs? It's interesting. One of the problem we have, for example with the Russell Square project, our financing, one of the things that we're using to pay for the housing is called tax credits, and that requires us to separate seniors from the families.

Joe Gyles: Why?

Sharon O'Hare: That's the State of Montana.

Joe Gyles: That's bureaucratic law. Sharon O'Hare: Then there is also--and, Terri, you pointed out a property management reason why I think sometimes there's an effort to separate seniors from families, there is a noise problem. You have a bunch of teenagers or kids. It's difficult to live right next door to that if you're senior and want it quiet.

???: I think it's ironic that in the private sector people are told they can't discriminate against someone who is renting from them because they have children, but in the Public Housing they're saying you have to be old to live here.

(Discussion was had concerning the problems of discrimination and the advantages of senior housing, that people should have a choice as to where they want to live.)

Sharon O'Hare: In our new development, there will be two bedroom units that are set up for small families. But that doesn't mean that a senior couple couldn't live there. They could live there in a second. It is kind of a sticky thing that when you get into designated senior housing, there are seniors that want to live in senior only housing. I agree, everybody should have a choice of where they live. Right now we have seniors that are living in other Public Housing, non-designated senior Public Housing.

I hope you are enjoying this and are as interested in this as I am. This is exactly the kind of stuff that we're supposed to be doing. We're all talking about this. Maybe we could add compatibility into the design standards. We're not going to go into the industrial part of town and build senior-only developments or build any kind of housing there.

Tola Denny: It would help a lot if people knew what their options were, what is available. When we first started having these meetings, I had no idea what Public Housing looked like.

Sharon O'Hare: Does anyone else want to see a Public Housing slide show?

(Everyone expressed interest in this)

As the hour was drawing to a close, Sharon O'Hare asked those present to take home the handouts from this meeting, review them, and be prepared to continue discussion at the next meeting to be held in February.

The meeting was concluded.

Correspondence from MHA to Resident Advisory Board Members

August 13, 2001

Dear Resident Advisory Board Member,

The next RAB meeting will be held on:

Wednesday, July 11, 2001, from 12:15 until 1:15 p.m. at the Vantage Villa Community Room, 1319 E. Broadway.

This is the final RAB meeting before the Board of Commissioners approves MHA's One Year Agency Plan for Fiscal Year 2002. We will review several parts of the Plan for your final comment, including:

- MHA's operating budget for the coming year (Fiscal Year 2002);
- MHA's Five Year Drug Elimination Plan

ALSO: RAB member Christine Greenwood, who attended a national conference for resident leaders in Dallas this spring, will report on what she learned at the conference.

What you need to do before the meeting:

- Call Terry in our office at 549-4113** to let her know if you will be attending, so that we know how many lunches to order.
- If you have any other questions, or need assistance with transportation arrangements,** call me or Terry at the same number.
- Be ready to voice your opinion** on what we're planning for the Missoula Housing Authority for next year.

Very truly yours,

Sharon O'Hare
Special Projects Manager
G:\OFFICE\SOH\MHAPLAN\IAB\RAB0706.wpd

August 13, 2001

Dear Resident Advisory Board Member,

The next Resident Advisory Board meeting is **Wednesday, May 9, 2001** at the Vantage Villa Community Room at 1319 East Broadway. Because this is the final RAB meeting before the draft of the MHA's One Year Agency Plan is released, the meeting will start at **noon** and last until **2:00 p.m.** As always, MHA will provide lunch.

There are a number of key features to the One Year Agency Plan that will be discussed, including:

- MHA's operating budget for the coming year (Fiscal Year 2002);
- MHA's Five Year Drug Elimination Plan, with a focus on how we should be spending our Drug Elimination Program funds;
- The Five Year Asset Management Plan for MHA-owned properties AND the Five Year Capital Fund Budget (how we plan on spending over \$500,000 in modernization money that we receive from HUD each year).

RAB member Christine Greenwood attended a national conference for resident leaders in Dallas last month and will report on what she learned at the conference. (If we run out of time at this meeting, we will carry the discussion over to June's meeting.)

What you need to do to prepare for the meeting:

- Call Paula in our office at 549-4113 to let her know if you will be attending, so that we know how many lunches to order.
- If you have any other questions, or need assistance with transportation arrangements, call me or Paula at the same number.
- Come prepared and willing to voice your opinion on what we're planning for the Missoula Housing Authority.

Again, thanks for your willingness to help us provide the best services possible.

Very truly yours,

Sharon O'Hare
Special Projects Manager

August 13, 2001

Dear Resident Advisory Board Member,

Due to scheduling conflicts, the next Resident Advisory Board meeting, originally scheduled for March 7, has been postponed until **Wednesday, March 14, 2001** at the Vantage Villa Community Room at 1319 East Broadway (same location as our MHA offices). The meeting will start at **noon**, and should last a little longer than usual, until 2:00 p.m. MHA will provide lunch. Please call Paula in our office at 549-4113 to let her know if you will be attending, so that we know how many lunches to order.

At the meeting, we will complete our discussion of the MHA's 5 Year and 1 Year Agency Plans, including the activities proposed for 2001. We will focus especially on MHA's proposed 5-Year Asset Management Plan. The Asset Management Plan addresses how MHA proposes to manage the properties we own, and spend the modernization funds that we receive from the federal government. Please remember to bring your copy of the plans, along with your written comments, to the meeting.

If you have any other questions, or need assistance with transportation arrangements, please feel free to call me or Paula at 549-4113. Again, thanks for your willingness to help us provide the best services possible. Your review and comment on the MHA Agency Plans is extremely important to the people we serve.

Very truly yours,

Sharon O'Hare
Special Projects Manager

January 31, 2001

Dear Resident Advisory Board Member,

The next Resident Advisory Board meeting will be **Wednesday, February 7, 2001** at the Vantage Villa Community Room at 1319 East Broadway (same location as our MHA offices). The meeting will start at **noon**, and should be over by 1:15. MHA will provide lunch. Please call Paula in our office at 549-4113 to let her know if you will be attending, so that we know how many lunches to order.

At the meeting, we will continue discussion of the MHA's 5 Year and 1 Year Agency Plans, including the activities proposed for 2001. Please remember to bring your copy of the plans, along with your written comments, to the meeting.

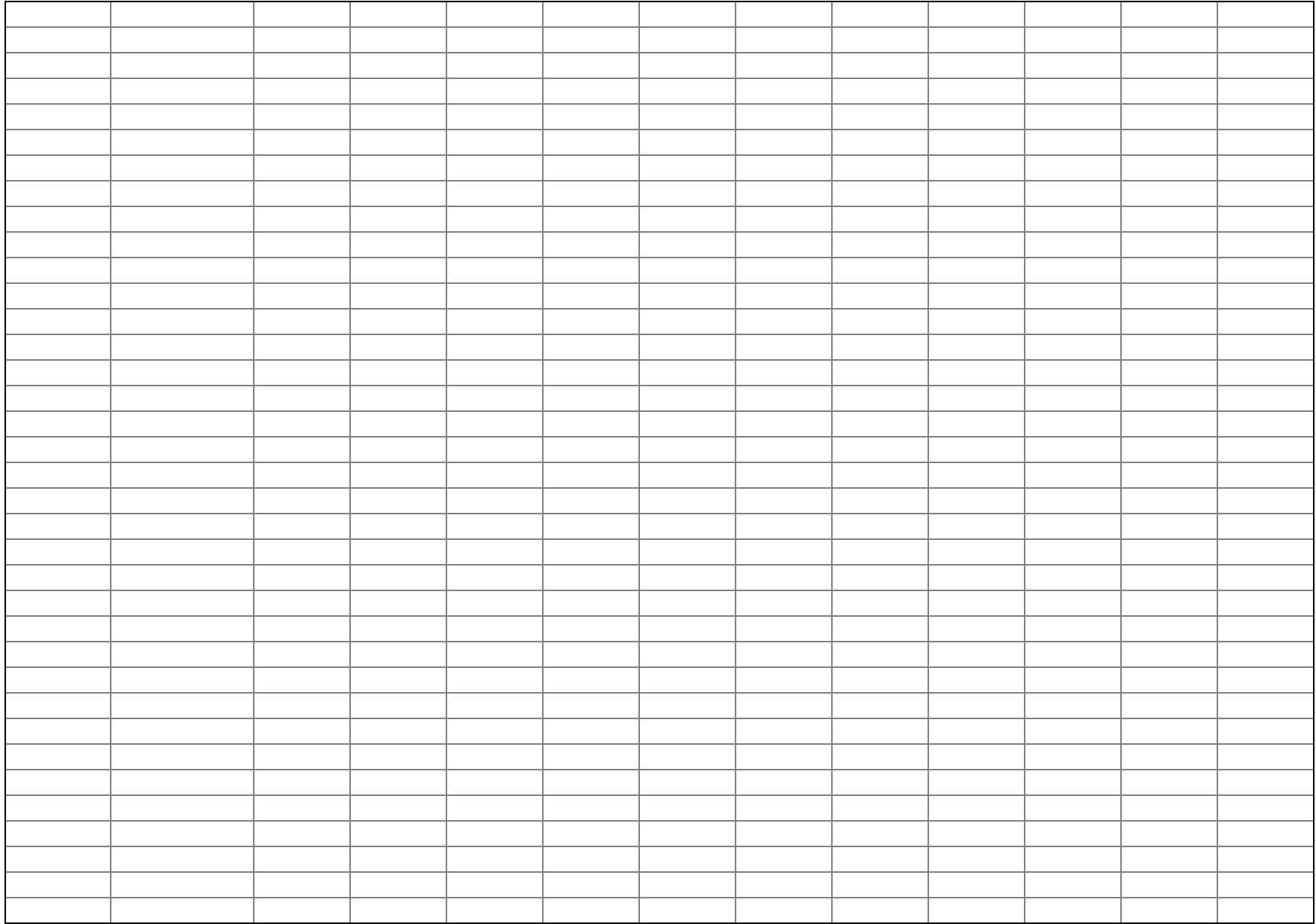
If you have any other questions, or need assistance with transportation arrangements, please feel free to call me or Paula at 549-4113. Again, thanks for your willingness to help us provide the best services possible. Your review and comment on the MHA Agency Plans is extremely important to the people we serve.

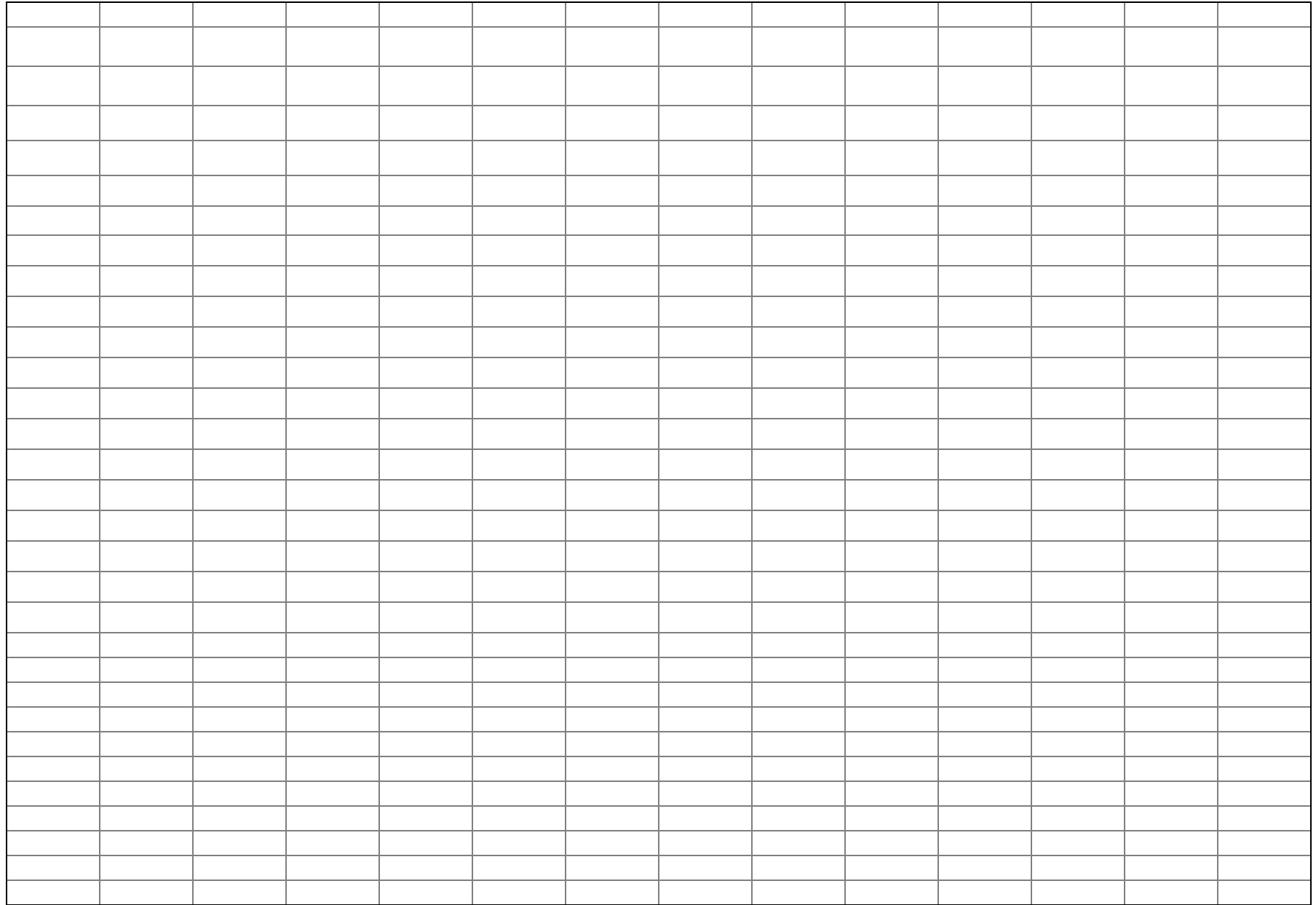
Very truly yours,

Sharon O'Hare
Special Projects Manager

MHA Public Housing Properties
Summary of 5 Year Asset Management Plan: FY2002-2006

				5 Year	5 Year
		# of		Total Mod	Mod Cost
<i>View Detailed Breakdown</i>		PH Units		Cost	/Unit
<i>On These Worksheets</i>					
<i>B, E</i>	Vantage Villa - Interior & Exterior Modernization	38		\$232,200	\$6,111
<i>C, F</i>	Multi-Family - Interior Modernization	86		\$489,600	\$8,967
<i>C, G</i>	Multi-Family - Exterior Modernization			\$281,600	incl above
<i>D, H</i>	Single Family - Interior Modernization	41		\$175,950	\$6,296
<i>D, I</i>	Single Family - Exterior Modernization			\$82,200	incl above
	Total PH Units	165			
	5 Year Modernization Budget Total:			\$1,261,550	
	5 Year - 10% Special Projects Contingency			\$126,155	
	5 Year Total Modernization Budget			\$1,387,705	
	1 Year Modernization Budget Total:			\$252,310	
	1 Year - 10% Special Projects Contingency			\$25,231	
	1 Year Total Modernization Budget			\$277,541	
	ALL FILES: SOH/ADMIN/MASTER5YEAR				





Avg Cost/ year
\$600
\$300
\$300
\$150
\$2,000
\$3,500
\$1,600
\$2,027
\$950
\$2,000
\$10,000
\$8,867
\$2,533
\$1,013
\$1,267
\$1,520
\$1,140
\$400
\$1,200
\$300
\$41,667
\$1,096

MHA		5 Year Public Housing Modernization Schedule				
Multi Family		86 units, 22 buildings				
					Avg. Cost	Avg Cost/
	Item	# of units	Planned life		to modernize	
Site	Re-pave pkg lot	22	10		\$1,000	\$2,200
	Site furniture & lighting	22	10		\$1,000	\$2,200
	Sidewalk, curbs, gutters	22	10		\$1,000	\$2,200
	Landscape & irrigation	22	10		\$1,000	\$2,200
Exterior	Roofing & sheet metal	22	20		\$7,000	\$7,700
	Siding	22				
	replace w. vinyl	22	20		\$7,000	\$7,700
	re-paint trim	22	7		\$1,000	\$3,143
	Windows, doors	86	20		\$3,000	\$12,900
Interior	Heating System:					
	boiler/baseboards	86	15		\$3,000	\$17,200
	Cabinets/ctrtops/sink/faucet	86	15		\$3,500	\$20,067
	Floor coverings	86				
	carpet or VCT @ LR	86	10		\$1,000	\$8,600
	sheet vinyl @ kitchen. bath	86	10		\$400	\$3,440
	Appliances					
	stove/range	86	10		\$500	\$4,300
	refrigerator	86	10		\$600	\$5,160
	water heater	86	10		\$450	\$3,870
					Cost per unit	\$0
MF PH Inventory (after Disposition)		Project				
	MF4 100 Pullman, #1,2, 3, 4	3				
	MF6 920 Pullman, #1,2,3,4,5,6	3				
	MF6 102 Pullman, #1,2,3,4,5,6	3				
	MF5 712 Charlo, #1,2,3,4,5	3				
	MF4 712 Charlo, #6,7,8,9	3				
	MF3 1320 Butte, #1,2,3	3				
	MF4 730 N. 6th W, #1,2,3,4	3				
	MF4 1237 Butte, #1,2,3,4	3				
	MF3 805 Stoddard, #1,2,3	3				
	MF3 811 Stoddard, #1,2,3	3				
	MF3 936 Stoddard, #1,2,3	3				
	MF3 1819 S. 8th W., #1,2,3	3				
	MF2 1609 Phillips, #1 & 2	9				

MHA 5 Year Public Housing Modernization Schedule					
Single Family 41 units, 37 buildings					
				Avg. Cost	Avg Cost/
	Item	# of units	Planned life	to modernize	
Site	Driveway, sidewalks	37	10	\$2,000	\$7,400
	Decks	15	10	\$2,000	\$3,000
	Landscaping	37	10	\$2,000	\$7,400
Exterior	Roofing & sheet metal	37	20	\$4,000	\$7,400
	Siding	37			
	replace w. vinyl	25	20	\$4,000	\$5,000
	re-paint trim	14	7	\$500	\$1,000
	Windows, doors, garage doors	37	20	\$6,000	\$11,100
Interior	Heating System:				
	gas forced air	41	15	\$2,000	\$5,467
	Cabinets/ctrtops/sink/faucet	41	15	\$3,500	\$9,567
	Floor coverings				
	carpet or VCT @ LR	41	10	\$1,200	\$4,920
	sheet vinyl @ kitchen. bath	41	10	\$400	\$1,640
	Appliances				
	stove/range	41	10	\$500	\$2,050
	refrigerator	41	10	\$600	\$2,460
	water heater	41	10	\$450	\$1,845
					\$70,248
				Cost per unit	\$1,713
SF PH Inventory (after Disposition)		Project			
	309 E. Spruce	1			
	315 E. Spruce	1			
SF (dplx)	442 W. Spruce/500 Owen	1			
	510 OWEN	1			
SF (dplx)	1028 Toole, #1 & #2	1			
SF (dplx)	1024 Worden, #1 & #2	3			
	2308 W. Vista	11			
	2324 W. Vista	11			
	2328 W. Vista	11			

MF PH Inventory (after Disposition)		HEATING		CABINETS& COUNTERS		FLOORING	
		\$2,000	In 2001-05 CAPITAL Plan?	\$3,500	In 2001-05 CAPITAL Plan?	\$300	CARPET STAIRS
		YRS Left	Amount	YRS Left	Amount	YRS Left	
MF4	100 Pullman, #1	3	budget \$3,000	5	\$3,500		5
	100 Pullman, #2	3	10 NO		\$3,500		5
	100 Pullman, #3	3	10 NO		\$3,500		5
	100 Pullman, #4	3	10 NO		\$3,500		5
MF6	920 Pullman, #1,	3	10 NO		\$3,500		5
	920 Pullman, #2	3	10 NO		\$3,500		5
	920 Pullman, #3	3	10 NO		\$3,500		5
	920 Pullman, #4	3	10 NO		\$3,500		5
	920 Pullman, #5	3	10 NO		\$3,500		5
	920 Pullman, #6	3	10 NO		\$3,500		5
MF6	102 Pullman, #1	3	10 NO		\$3,500		5
	102 Pullman, #2	3	10 NO		\$3,500		5
	102 Pullman, #3	3	10 NO		\$3,500		5
	102 Pullman, #4	3	10 NO		\$3,500		5
	102 Pullman, #5	3	10 NO		\$3,500		5
	102 Pullman, #6	3	10 NO		\$3,500		5
MF5	712 Charlo, #1	3	budget \$3,000	5	\$3,500		5
	712 Charlo, #2	3	10 NO		\$3,500		5
	712 Charlo, #3	3	10 NO		\$3,500		5
	712 Charlo, #4	3	10 NO		\$3,500		5
	712 Charlo, #5	3	10 NO		\$3,500		5
MF4	712 Charlo, #6	3	10 NO		\$3,500		5
	712 Charlo, #7	3	10 NO		\$3,500		5
	712 Charlo, #8	3	10 NO		\$3,500		5
	712 Charlo, #9	3	10 NO		\$3,500		5
MF3	1320 Butte, #1	3	budget \$3,000	5	\$3,500		5
	1320 Butte, #2	3	10 NO		\$3,500		5
	1320 Butte, #3	3	10 NO		\$3,500		5
MF4	730 N. 6th W, #1	3	10 NO		\$3,500		5
	730 N. 6th W, #2	3	10 NO		\$3,500		5
	730 N. 6th W, #3	3	10 NO		\$3,500		5
	730 N. 6th W, #4	3	10 NO		\$3,500		5
MF4	1237 Butte, #1	3	10 NO		\$3,500		5
	1237 Butte, #2	3	10 NO		\$3,500		5
	1237 Butte, #3	3	10 NO		\$3,500		5
	1237 Butte, #4	3	10 NO		\$3,500		5
MF3	805 Stoddard, #1	3	budget \$3,000	5	\$3,500		5
	805 Stoddard, #2	3	10 NO		\$3,500		5
	805 Stoddard, #3	3	10 NO		\$3,500		5
MF3	811 Stoddard, #1	3	10 NO		\$3,500		5
	811 Stoddard, #2	3	10 NO		\$3,500		5
	811 Stoddard, #3	3	10 NO		\$3,500		5
MF3	936 Stoddard, #1	3	10 NO		\$3,500		5
	936 Stoddard, #2	3	10 NO		\$3,500		5

	936 Stoddard, #3	3	10	NO		\$3,500	5
MF PH Inventory			HEATING		CABINETS& COUNTERS		FLOORING
(after Disposition)			In 2001-05		In 2001-05		CARPET STAIRS
			\$2,000	CAPITAL Plan?	\$3,500	CAPITAL Plan?	\$300
			YRS Left	Amount	YRS Left	Amount	YRS Left
MF2	1024 Worden (2 units)	3	10	NO			
MF3	1819 S. 8th W., #1	3	10	NO		\$3,500	5
	1819 S. 8th W., #2	3	10	NO		\$3,500	5
	1819 S. 8th W., #3	3	10	NO		\$3,500	5
MF2	1609 Phillips, #1	9	budget	\$3,000	5	\$3,500	5
	1609 Phillips, #2	9	10	NO		\$3,500	5
MF2	1613 Phillips, #1	9	10	NO		\$3,500	5
	1613 Phillips, # 2	9	10	NO		\$3,500	5
MF2	1028 Toole (2 units)	1					
MF4	1201 Toole, #1	9	10	NO		\$3,500	5
	1201 Toole, #2	9	10	NO		\$3,500	5
	1201 Toole, #3	9	10	NO		\$3,500	5
	1201 Toole, #4	9	10	NO		\$3,500	5
MF3	1205 Toole, #1	9	10	NO		\$3,500	5
	1205 Toole, #2	9	10	NO		\$3,500	5
	1205 Toole, #3	9	10	NO		\$3,500	5
MF4	1209 Toole, #1	9	10	NO		\$3,500	5
	1209 Toole, #2	9	10	NO		\$3,500	5
	1209 Toole, #3	9	10	NO		\$3,500	5
	1209 Toole, #4	9	10	NO		\$3,500	5
MF4	931 S. 4th W, #A	11	10	NO		\$3,500	5
	931 S. 4th W, #B	11	10	NO		\$3,500	5
	931 S. 4th W, #C	11	10	NO		\$3,500	5
	931 S. 4th W, #D	11	10	NO		\$3,500	5
MF4	933 S. 4th W, #A	11	10	NO		\$3,500	5
	933 S. 4th W, #B	11	10	NO		\$3,500	5
	933 S. 4th W, #C	11	10	NO		\$3,500	5
	933 S. 4th W, #D	11	10	NO		\$3,500	5
MF5	5 Russell Park	12	budget	\$3,000	5	\$3,500	5
	6 Russell Park	12	10	NO		\$3,500	5
	7 Russell Park	12	10	NO		\$3,500	
	8 Russell Park	12	10	NO		\$3,500	
	9 Russell Park	12	10	NO		\$3,500	5
MF5	41 Russell Park	12	10	NO		\$3,500	5
	42 Russell Park	12	10	NO		\$3,500	5
	43 Russell Park	12	10	NO		\$3,500	5
	44 Russell Park	12	10	NO		\$3,500	
	45 Russell Park	12	10	NO		\$3,500	5
MF5	46 Russell Park	12	10	NO		\$3,500	5
	47 Russell Park	12	10	NO		\$3,500	5
	48 Russell Park	12	10	NO		\$3,500	5
	49 Russell Park	12	10	NO		\$3,500	5
	50 Russell Park	12	10	NO		\$3,500	5

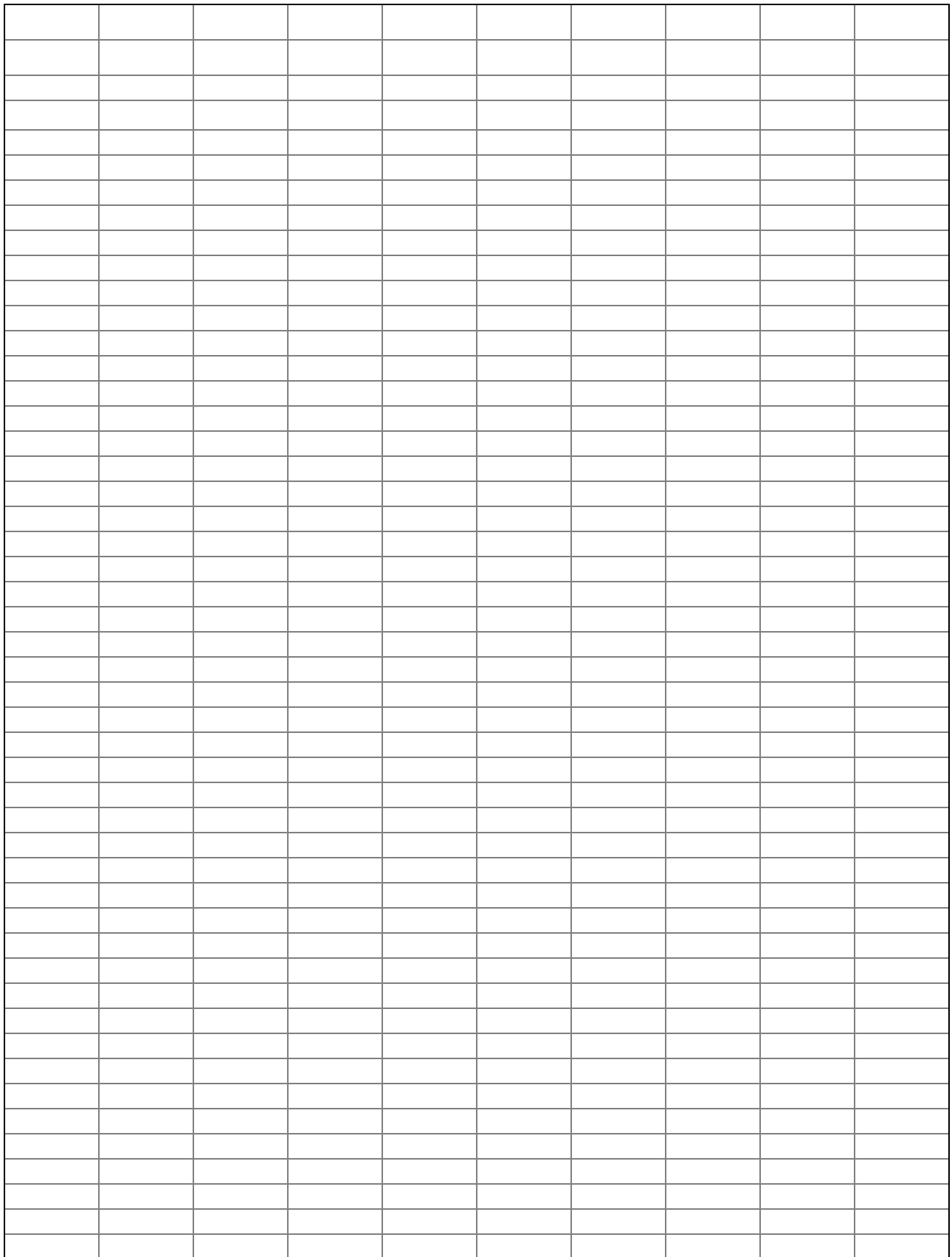
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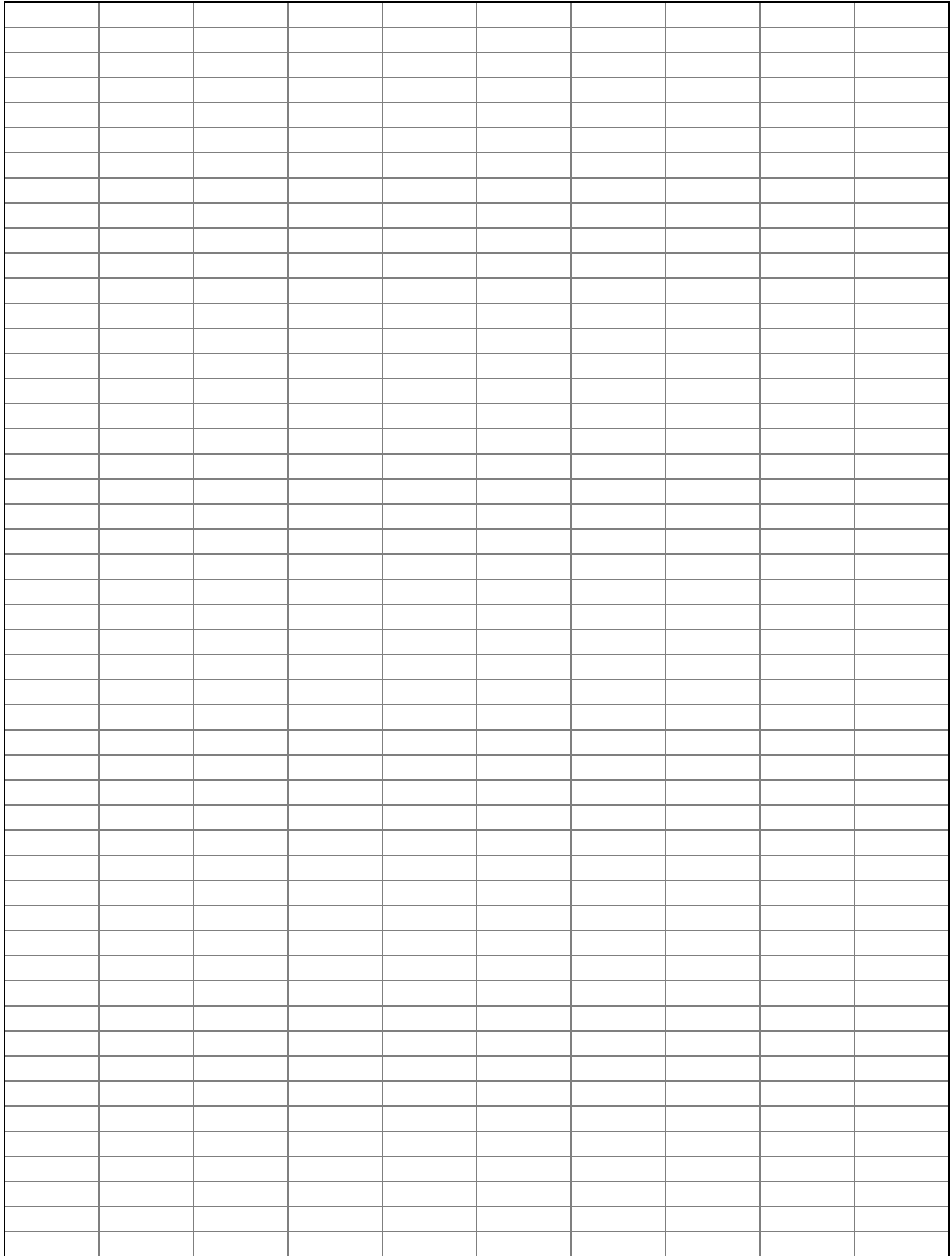
In 2001-05 CAPITAL Plan? Amount	VINYL in BATH	In 2001-05 CAPITAL Plan? Amount	CT@LR, KITCHEN	In 2001-05 CAPITAL Plan? Amount	OVEN	In 2001-05 CAPITAL Plan? Amount
	\$200	\$200	\$400	\$400	\$500	\$500
	YRS Left	Amount	YRS Left	Amount	YRS Left	Amount
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
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\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	15	NO		\$400	3	\$500
\$300	5	\$200	5	\$400	3	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	2	\$200	5	\$400	3	\$500
\$300	10	NO		\$400	3	\$500
\$300	5	\$200	5	\$400	3	\$500
\$300	3	\$200	5	\$400	1	\$500
\$300	10	NO		\$400	3	\$500
\$300	5	\$200	5	\$400	3	\$500
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\$300	3	\$200	5	\$400	3	\$500
\$300	5	\$200	5	\$400	3	\$500
\$300	3	\$200	5	\$400	10	NO
\$300	5	\$200	20	NO		\$500
\$300	5	\$200	20	NO		\$500
\$300	5	\$200	5	\$400	3	\$500
\$300	5	\$200	15	NO		\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	20	NO		\$500
\$300	5	\$200	15	NO		\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500
\$300	5	\$200	5	\$400	5	\$500

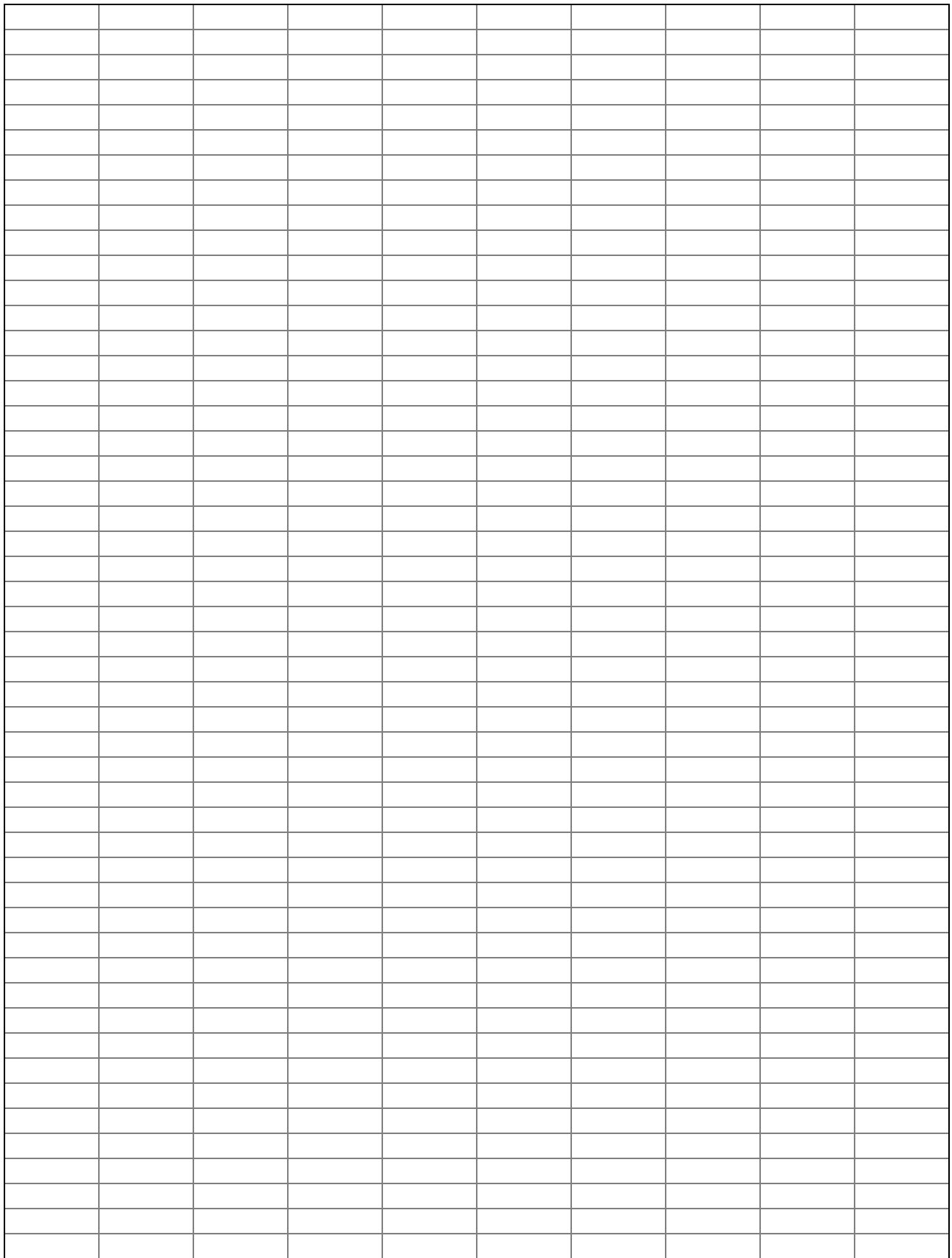
G	\$300	5	\$200	5	\$400	5	\$500
	In 2001-05	VINYL in BATH	In 2001-05	CT@LR, KITCHE	In 2001-05	OVEN	In 2001-05
	CAPITAL Plan?	\$200	CAPITAL Plan?	\$400	CAPITAL Plan?	\$500	CAPITAL Plan?
	Amount	YRS Left	Amount	YRS Left	Amount	YRS Left	Amount
\$300	5	\$200	5	\$400	5	\$500	
\$300	5	\$200	10	NO		\$500	
\$300	5	\$200	15	NO		\$500	
\$300	5	\$200	5	\$400	5	\$500	
\$300	5	\$200	5	\$400	5	\$500	
\$300	5	\$200	5	\$400	5	\$500	
\$300	5	\$200	15	NO		\$500	
\$300	5	\$200	5	\$400	5	\$500	
\$300	5	\$200	5	\$400	5	\$500	
\$300	5	\$200	5	\$400	5	\$500	
\$300	5	\$200	5	\$400	5	\$500	
\$300	5	\$200	15	NO		\$500	
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\$300	5	\$200	5	\$400	20	NO	
\$300	5	\$200	15	NO		\$500	
\$300	5	\$200	5	\$400	3	\$500	
\$300	5	\$200	25	NO		\$500	
\$300	5	\$200	5	\$400	5	\$500	
\$300	5	\$200	20	NO		\$500	
\$300	5	\$200	15	NO		\$500	
\$300	5	\$200	15	NO		\$500	
\$300	5	\$200	20	NO		\$500	
\$300	5	\$200	20	NO		\$500	
\$300	5	\$200	5	\$400	5	\$500	
\$300	5	\$200	20	NO		\$500	
\$300		\$200		\$400		\$500	
\$300		\$200		\$400		\$500	
\$300	5	\$200	5	\$400	3	\$500	
\$300	5	\$200	5	\$400	3	\$500	
\$300	5	\$200	5	\$400	5	\$500	
\$300	5	\$200	5	\$400	5	\$500	
\$300		\$200		\$400		\$500	
\$300	5	\$200	20	NO		\$500	
\$300	5	\$200	20	NO		\$500	
\$300	5	\$200	5	\$400	5	\$500	
\$300	5	\$200	20	NO		\$500	
\$300	5	\$200	20	NO		\$500	
\$300	5	\$200	5	\$400	5	\$500	

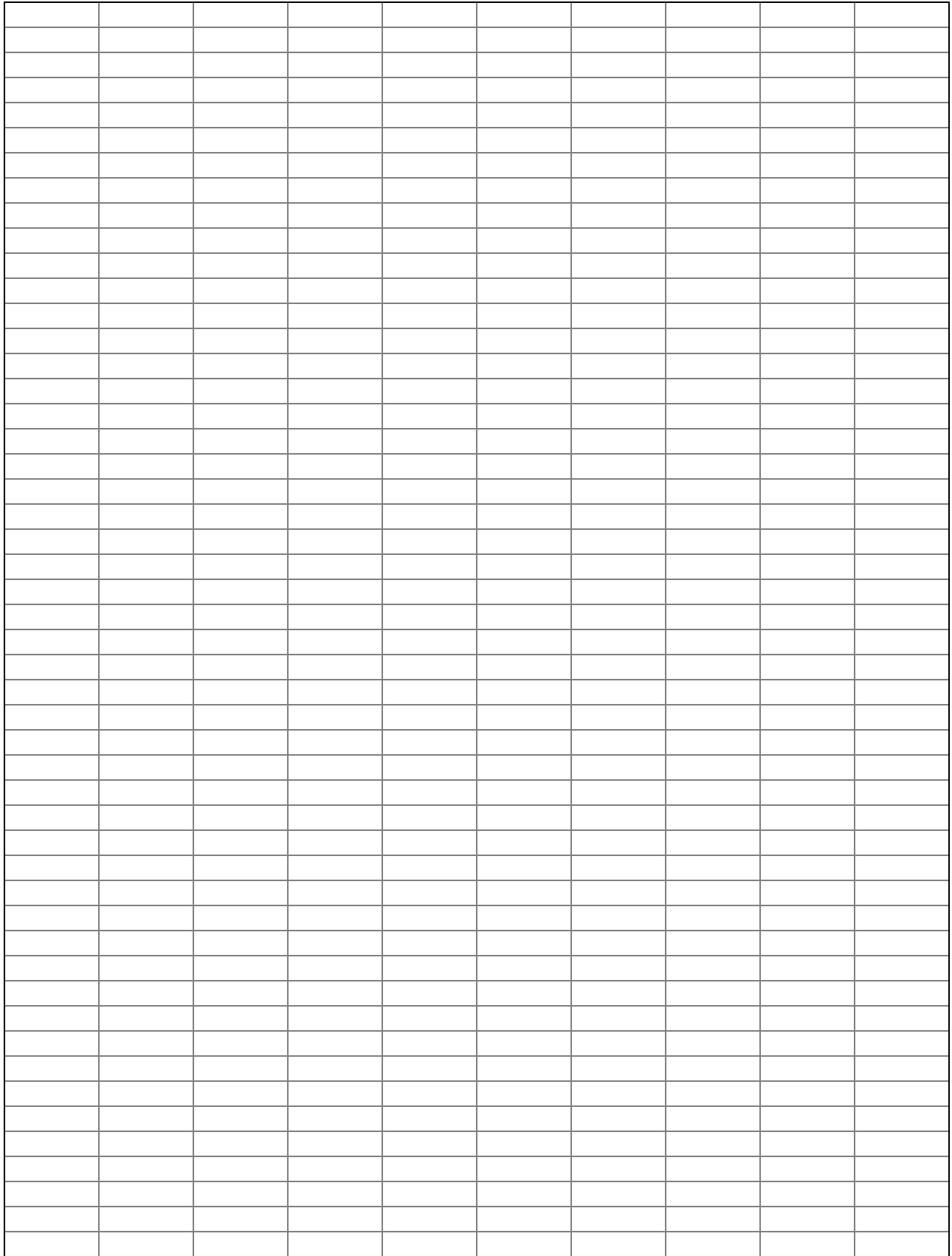
Confirm w. TenMast records					Special Projects in 2001-05 Capital Plan	NOTES
REFER	In 2001-05 CAPITAL Plan?	H2O HTR	In 2001-05 CAPITAL Plan?			
\$600	Amount	YRS Left	Amount			
5	\$600	7	NO			
5	\$600	7	NO			
5	\$600	7	NO			
5	\$600	7	NO			
5	\$600	7	NO			
5	\$600	7	NO			
5	\$600	7	NO			
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5	\$600	7	NO			
5	\$600	7	NO			
5	\$600	7	NO			
5	\$600	7	NO			
5	\$600	7	NO			
5	\$600	7	NO			
10	NO		\$250			
10	NO		\$250			
5	\$600	7	NO			
5	\$600	7	NO			
3	\$600	10	NO			
5	\$600	10	NO			
5	\$600	10	NO			
3	\$600	10	NO			
3	\$600	15	NO			
10	NO		\$250			
10	NO		\$250			
3	\$600	3	\$250			
3	\$600	10	NO			
3	\$600	10	NO			
3	\$600	15	NO			
	\$600		\$250			
5	\$600	10	NO			
5	\$600	10	NO			
10	NO		\$250			
3	\$600	10	NO			
5	\$600	7	NO			
5	\$600	7	NO			
3	\$600	10	NO			
3	\$600	10	NO			
5	\$600	7	NO			
5	\$600	7	NO			
5	\$600	7	NO			
5	\$600	7	NO			

5	\$600	7	NO		
<i>Confirm w. TenMast records</i>					
REFER	In 2001-05	H2O HTR	In 2001-05	Special Projects in	
\$600	CAPITAL Plan?	\$250	CAPITAL Plan?	2001-05	
	Amount	YRS Left	Amount	Capital Plan	NOTES
5	\$600	7	NO		
3	\$600	10	NO		
7	NO		\$250		
5	\$600	7	NO		
5	\$600	7	NO		
5	\$600	7	NO		
	\$600		\$250		
5	\$600	7	NO		
5	\$600	7	NO		
5	\$600	7	NO		
5	\$600	7	NO		
5	\$600	7	NO		
	\$600	1	\$250		
	\$600	10	NO		
	\$600	2	\$250		
	\$600	10	NO		
5	\$600	10	NO		
3	\$600	3	\$250		
	\$600	10	NO		
5	\$600	7	NO		
3	\$600	10	NO		
3	\$600	10	NO		
3	\$600	10	NO		
3	\$600	10	NO		
3	\$600	10	NO		
5	\$600	7	NO		All RP townhouses: sheetrock
3	\$600	10	NO		
3	\$600	5	\$250	2000	
5	\$600	7	NO		
3	\$600	5	\$250	2000	
2	\$600	5	\$250	2000	
5	\$600	7	NO		
4	\$600	3	\$250	2000	
5	\$600	7	NO		
4	\$600	5	\$250	2000	
3	\$600	10	NO		
5	\$600	5	\$250	2000	
2	\$600	5	\$250	2000	
3	\$600	5	\$250	2000	
5	\$600	7	NO		









Multi-Family (MF) EXTERIOR SYSTEMS: 5 Year Modernization

		Mod Cost:			
		Roof condition	\$3,500	In 2001-05 CAPITAL Plan?	Siding type
Russell Park					
	5 Russell Park	A	20	NO	M
	6 Russell Park	A	20	NO	M
	7 Russell Park	A	20	NO	M
	8 Russell Park	A	20	NO	M
	9 Russell Park	A	20	NO	M
	41 Russell Park	A	20	NO	M
	42 Russell Park	A	20	NO	M
	43 Russell Park	A	20	NO	M
	44 Russell Park	A	20	NO	M
	45 Russell Park	A	20	NO	M
	46 Russell Park	A	20	NO	M
	47 Russell Park	A	20	NO	M
	48 Russell Park	A	20	NO	M
	49 Russell Park	A	20	NO	M
	50 Russell Park	A	20	NO	M
	52 Russell Park	B	10	NO	W
	54 Russell Park	B	5	\$3,500	W
Orange - Russell Street Area					
	931 S. 4th West (4 units)	C	5	\$10,000	W
	933 S. 4th West (4 units)	C	5	\$10,000	W
	1028 Toole (2 units)	A	15	NO	W
	1201 Toole (4 units)	B	10	NO	W
	1205 Toole (3 units)	B	10	NO	W
	1209 Toole (4 units)	B	10	NO	W
	1209 Toole (4 units)	B	10	NO	W
Northside					
	730 N. 6th West (4 units)	A	25	NO	W
	1237 Butte (4 units)	A	25	NO	W
	1320 Butte (3 units)	A	25	NO	W
	712 Charlo (9 units)	A	25	NO	W

h Plan, FY2002-2006

	Mod Cost		Siding		
	\$7,000	In 2001-05	Paint	Mod Cost	Windows
condition		CAPITAL Plan?	condition	\$2,500	condition
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
A	30	NO	N/A	NO	replace entry w.
C	3	\$7,000	B	NO	B/M
A	15	NO	A	NO	B/M
B	10	NO	C	\$4,000	B
B	10	NO	C	\$4,000	B
B	15	NO	C	\$2,000	B
B	10	NO	C	\$4,000	B
B	10	NO	C	\$3,000	B
B	10		B		B
B	10	NO	C	\$4,000	B
B	10	NO	C	\$4,000	B
B	10	NO	C	\$4,000	B
B	10	NO	C	\$3,000	B
B	10	NO	C	\$9,000	B

Mod Cost	Deck	Mod Cost	Entry Door	Mod Cost	Garage Dr
\$4,000	condition	\$2,000	condition	\$500	condition
\$500	N/A	NO	add screen door	\$300	A/M
\$500	N/A	NO	add screen door	\$300	A/M
\$500	N/A	NO	add screen door	\$300	A/M
\$500	N/A	NO	add screen door	\$300	A/M
\$500	N/A	NO	add screen door	\$300	A/M
\$500	N/A	NO	add screen door	\$300	A/M
\$500	N/A	NO	add screen door	\$300	A/M
\$500	N/A	NO	add screen door	\$300	A/M
\$500	N/A	NO	add screen door	\$300	A/M
\$500	N/A	NO	add screen door	\$300	A/M
\$500	N/A	NO	add screen door	\$300	A/M
\$500	N/A	NO	add screen door	\$300	A/M
\$500	N/A	NO	add screen door	\$300	A/M
\$500	N/A	NO	add screen door	\$300	A/M
\$500	N/A	NO	add screen door	\$300	A/M
NO	C	\$2,000	add screen door	\$300	A/M
NO	B	NO	add screen door	\$300	A/M
NO	A	NO	A	NO	N/A
NO	A	NO	B	NO	N/A
NO	N/A	NO	C/MNS	\$500	N/A
NO	N/A	NO	C/MNS	\$500	N/A
NO	N/A	NO	C/MNS	\$500	N/A
	N/A		A/MNS		N/A
NO	N/A	NO	C/MNS	\$500	N/A
NO	N/A	NO	add 2 screen doors	\$500	N/A
NO	N/A	NO	add 2 screen doors	\$500	N/A
NO	N/A	NO	add 2 screen doors	\$500	N/A
NO	N/A	NO	add 2 screen doors	\$500	N/A

	Site Features		Landscape,	Other Items, Notes	
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Mod Cost	Pkng Lot	Mod Cost	Sprinklers	Mod Cost	Mod Cost
----------	----------	----------	------------	----------	----------

\$800					
					\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$300
				\$500	\$3,500
				\$500	
					\$6,000
					\$6,000
		1000			\$7,000

@ MF RP: add screen				
doors, landscape				
paint upper wall				
paint upper wall				
paint upper wall				
paint upper wall				
paint upper wall				
paint upper wall				
paint upper wall				
paint upper wall				
paint upper wall				
paint upper wall				
paint upper wall				
patch parapet wall?				
patch parapet wall?; shingle missing				
common area imp: stairs, re-strip lot, add lighting				
trim on windows needs paint (@ south side)				
@ Toole site: fence, parking lot				
landscape hillside, add play equip				
play equip				
peeling paint @ west side				
screen door rusting out				
play equip				
screen doors bad (rusted out)				
re-stripe lot;lighting/landscp,play equip				

In 2001-05							
CAPITAL Plan?							
Amount							
\$250							
NO							
NO							
\$250							
\$250							
\$250							
NO							
NO							
NO							
NO							
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\$250							
\$250							
\$250							
\$250							
\$250							
\$5,500							
22							
water heaters							





Single Family (SF) EXTERIOR SYSTEMS: 5 Year Modernization

		Mod Cost:				
		Roof	\$3,500	In 2001-05	Siding	
Address		condition	YRS Left	CAPITAL Plan?	type	condition
				CAPITAL Plan?		
5600 Ebb Way		A	25	NO	W	B
192 Grandview		A	15	NO	W	A
205-211 Grandview		A	15	NO	W	A
5611 Hillview		A	25	NO	W	B
5614 Hillview		A	25	NO	W	B
5605 Longview		A	10	NO	W	B
2235 E. Vista		A	15	NO	W	C - will repaint
2244 E. Vista		B	10	NO	W	B
2308 W. Vista		A	15	NO	V	A
2324 W. Vista		B	10	NO	V	A
2328 W. Vista		B	10	NO	V	A
2244 E. Summit		B	10	NO	W	C- will repaint
2311 W. Summit		B	10	NO	W	B
2324 W. Summit		B	10	NO	W	C- will repaint
2327 W. Summit		B	5	\$3,500	V	A
2328 W. Summit		B	10	NO	W	C - will repaint
4 Russell Park		A	25	NO	V	A
23 Russell Park		A	15	NO	M	A
25 Russell Park		B	10	NO	T-111	B
28 Russell Park		C	5	\$3,500	W	C
32 Russell Park		C	5	\$3,500	W	A
36 Russell Park		C	5	\$3,500	W	C
39 Russell Park		B	10	NO	W	C
Central Missoula: Westside						
1819 S. 8th West		A	25	NO	W	B
2335 Cottage Court		A	15	NO	W	A
2395 Cottage Court		A	15	NO	W	A
2323 Mount		A	20	NO	W	B
Downtown						
309 E. Spruce		A	20	NO	W	A
315 E. Spruce		A	20	NO	W	A
442 W. Spruce		B	8	NO	V	A
510 Owens		B	8	NO	V	A
500 Owens		B	8	NO	V	A
				\$14,000		
Total SF Exterior Modernization for 5 Years						\$82,200

n Plan, FY2002-2006						
Mod Cost		Siding				
\$7,000	In 2001-05	Paint	Mod Cost	Windows	Mod Cost	Deck
	CAPITAL Plan?	condition	\$2,500	condition	\$4,000	condition
YRS Left	CAPITAL Plan?					
15	NO	A	NO	A	NO	N/A
20	NO	A	NO	A	NO	N/A
20	NO	A	NO	A	NO	N/A
15	NO	A	NO	B	NO	B
10	NO	B	NO	B	NO	C
10	NO	B	NO	B	NO	B
5	NO	C	\$2,500	B	NO	B
10	NO	C	\$2,500	C	\$4,000	C
25	NO	N/A	NO	A	NO	B
25	NO	N/A	NO	A	NO	B
25	NO	N/A	NO	A	NO	B
5	NO	C	\$2,500	B	NO	B
10	NO	B	NO	B	NO	C
5	NO	C	\$2,500	B	NO	B
25	NO	N/A	NO	A	NO	N/A
5	NO	C	\$2,500	B	NO	B
30	NO	N/A	NO	B/M	NO	A
30	NO	N/A	NO	B/M	NO	B
10	NO	A	NO	B/M	NO	B
5	\$7,000	B	NO	B/M	NO	B
30	NO	NA	NO	B/M	NO	B
5	\$7,000	A	NO	B/M	NO	B
3	\$7,000	B	NO	B/M	NO	B
10	NO	B	NO	B	NO	N/A
20	NO	B	NO	A	NO	N/A
20	NO	B	NO	A	NO	N/A
10	NO	B	NO	B	NO	N/A
15	NO	A	NO	A	NO	N/A
15	NO	B	NO	B	NO	N/A
20	NO	N/A	NO	B	NO	N/A
20	NO	N/A	NO	B	NO	N/A
20	NO	N/A	NO	B	NO	N/A
	\$21,000		\$15,000		\$8,000	

					Site Features	
Mod Cost	Entry Door	Mod Cost	Garage Dr	Mod Cost	Pkng Lot	Mod Cost
\$2,000	condition	\$500	condition	\$800	Pkng Lot	
NO	A/M	NO	A/M			
NO	AM/NS	NO	A/M			
NO	A/M/NS	NO	A/M			
NO	A/M/NS	NO	A/M			
\$2,000	A/M	NO	A/M			
NO	AM/NS	NO	A/M			
NO	A/M/NS	NO	B/W			
\$2,000	A/M/NS	NO	B/M			
NO	A/M	NO	A/M			
NO	BM/NS	NO	A/M			
NO	B/M	NO	A/M			
NO	A/M	NO				
\$2,000	AM/NS	NO	C/W	\$800		
NO	A/M	NO	B/M			
NO	A/M/NS	NO	C/W	\$800		
NO	A/M/NS	NO	C/W	\$800		
NO	add screen door	\$300	A/M			
NO	add screen door	\$300	A/M			
NO	add screen door	\$300	A/M			
NO	add screen door	\$300	A/M			
NO	add screen door	\$300	A/M			
NO	add screen door	\$300	A/M			
NO	add screen door	\$300	N/A			
		NO				
NO	A/M	NO	N/A			
NO	AM/NS	NO	A/W			
NO	A/M/NS	NO	A/W			
NO	A/M	NO	B/W			
NO	A/W	NO	N/A			
NO	A/W/NS	NO	N/A			
NO	A/M	NO	N/A			
NO	AM/NS	NO	N/A			
NO	A/M	NO	N/A			
\$8,000		\$2,600		\$3,200		\$0

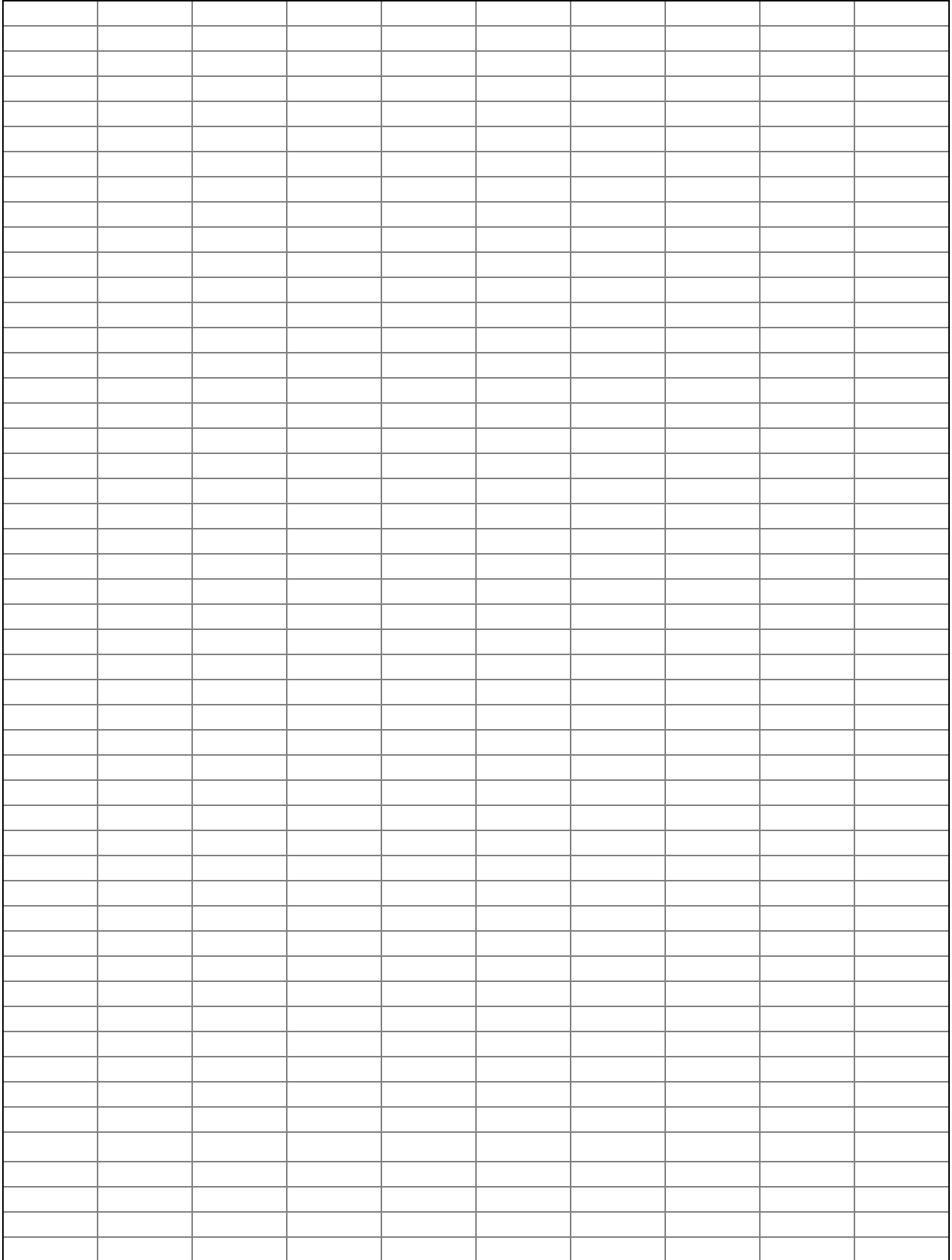
Landscape,		Other Items, Notes				
Sprinklers	Mod Cost	Mod Cost				
<i>Special Notes</i>						
	\$600		gutters, landscape front yard			
	\$300		fence back, replace bark			
	\$1,500		fence back, replace bark			
			repair front sidewalk, retaining wall			
			plumbing problem? Driveway			
			roof problem?			
			needs paint			
	\$500		tree/sewer line/carpet			
	\$500					
	\$500		replace missing shingles, shower valve changeout			
	\$500		fence backyard			
	\$500		fdn problem			
	\$500		replace missing shingles, new fence			
	\$500		patch parapet wall?, add screen door			
			trim needs paint			
			trim needs paint, driveway improvements			
	\$1,500		add u.g. sprinklers			
	\$1,500		add u.g. sprinklers			
	\$1,500		add u.g. sprinklers			
	\$10,400	\$0				



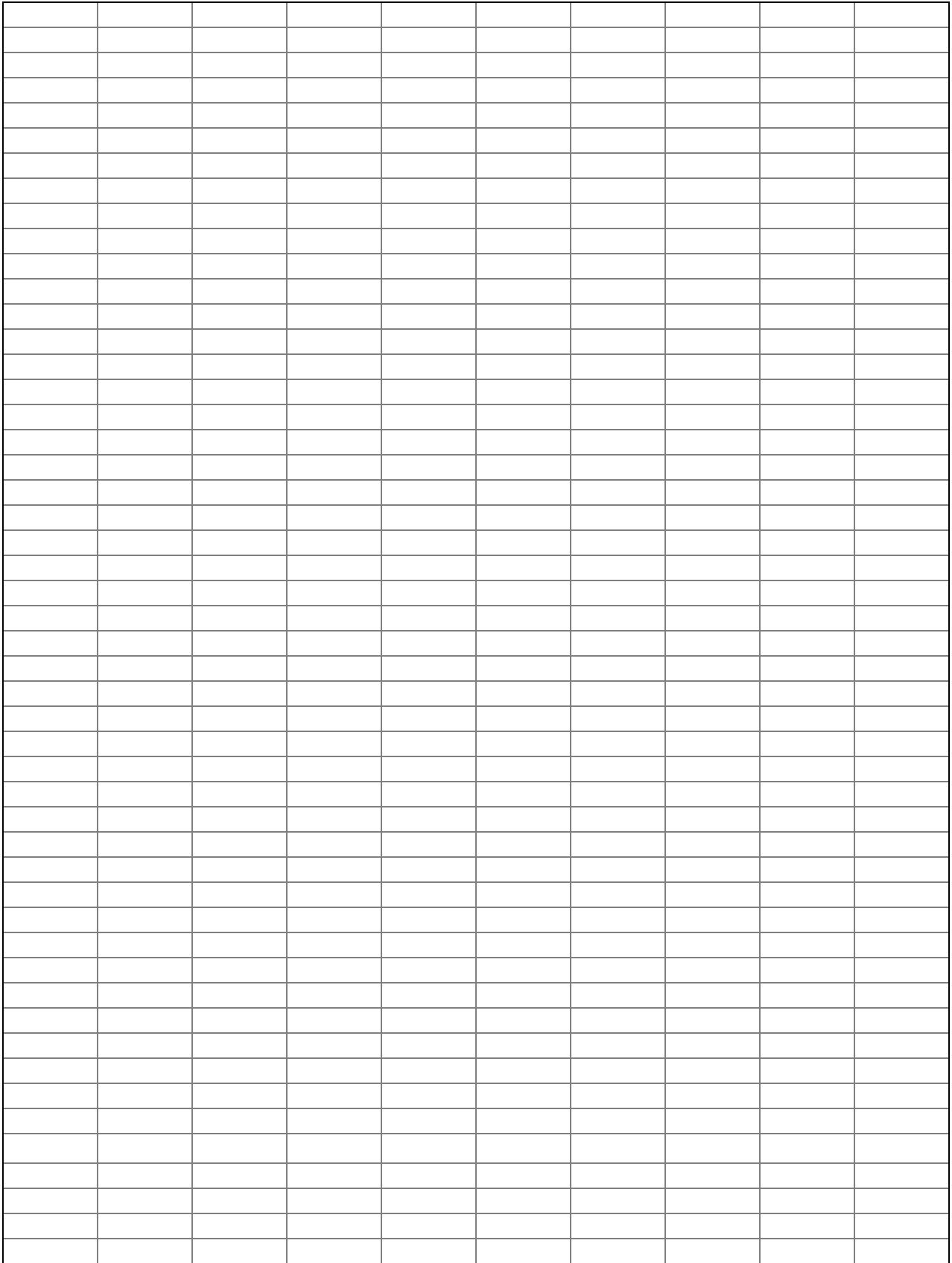












Public Housing Drug Elimination Program Plan

Annual PHDEP Plan Table of Contents:

1. General Information/History
2. PHDEP Plan Goals/Budget
3. Milestones
4. Certifications

Section 1: General Information/History

- A. Amount of PHDEP Grant **\$ 51,595**_____
- B. Eligibility type (Indicate with an "x") N1 **X** N2_____ R_____
- C. FFY in which funding is requested **FY2002**
- D. Executive Summary of Annual PHDEP Plan

The Missoula Housing Authority Drug Elimination Program will provide law enforcement services above current baseline services for its 210 public housing units in Missoula, Montana. The program will focus in the elimination and prevention of Part I and Part II crimes on and near public housing communities. The MHA will also contract with local youth organizations to provide youth program activities for public housing residents.

E. Target Areas

PHDEP Target Areas (Name of development(s) or site)	Total # of Units within the PHDEP Target Area(s)	Total Population to be Served within the PHDEP Target Area(s)
All MHA sites/all MHA developments: MT033P001, P002, P003, P008, P009, P011, P012, P014, & P018	165	628

F. Duration of Program

6 Months_____ 12 Months **X** 18 Months_____ 24 Months_____ Other _____

G. PHDEP Program History: No history - First time Grant

Section 2: PHDEP Plan Goals and Budget

A. PHDEP Plan Summary

The Missoula Housing Authority will contract with the Missoula Police Department to provide law enforcement services above and beyond baseline for 210 public housing units in Missoula, Montana.

Funds Requested: \$43,200: Contract services with Missoula Police Department for one officer at a full time rate. Amount includes salary plus benefits and a one time first year equipment charge of \$4,500.

\$ 8,395 Contract services with local youth organization to provide youth program activities for public housing residents.

Total Amount Requested: \$51,595

B. PHDEP Budget Summary

FY2002 _____ PHDEP Budget Summary

Budget Line Item	Total Funding
9110 - Reimbursement of Law Enforcement	\$43,200
9120 - Security Personnel	
9130 - Employment of Investigators	
9140 - Voluntary Tenant Patrol	
9150 - Physical Improvements	
9160 - Drug Prevention	
9170 - Drug Intervention	
9180 - Drug Treatment	
9190 - Other Program Costs	\$ 8,395
TOTAL PHDEP FUNDING	\$51,595

Plan Goals and Activities
PHDEP

9110 - Reimbursement of Law Enforcement					Total PHDEP Funding: \$43,200		
Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount/Source)	Performance Indicators
1. Contract law enforcement activities			10/01/01	9/30/02	43,200		crime tracking
2.							
3.							

9120 - Security Personnel					Total PHDEP Funding: \$		
Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount/Source)	Performance Indicators
1.							
2.							
3.							

9130 - Employment of Investigators					Total PHDEP Funding: \$		
Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount/Source)	Performance Indicators
1.							
2.							
3.							

9140 - Voluntary Tenant Patrol					Total PHDEP Funding: \$		
Goal(s)							
Objectives							
Proposed Activities	# of	Target	Start	Expected	PHEDEP	Other	Performance Indicators

	Persons Served	Population	Date	Complete Date	Funding	Funding (Amount /Source)	
1.							
2.							
3.							

9150 - Physical Improvements	Total PHDEP Funding: \$
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Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount /Source)	Performance Indicators
1.							
2.							
3.							

9160 - Drug Prevention	Total PHDEP Funding: \$
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Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount /Source)	Performance Indicators
1.							
2.							
3.							

9170 - Drug Intervention					Total PHDEP Funding: \$		
Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount /Source)	Performance Indicators
1.							
2.							
3.							

9180 - Drug Treatment					Total PHDEP Funding: \$		
Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount /Source)	Performance Indicators
1.							
2.							
3.							

9190 - Other Program Costs					Total PHDEP Funds: \$8,395		
Goal(s)							
Objectives							
Proposed Activities"	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount /Source)	Performance Indicators
Contract youth services							
1.			10/1/01	9/30/02	8,395		
2.							
3.							

Section 3: Expenditure/Obligation Milestones

Budget Line Item #	25% Expenditure of Total Grant Funds By Activity #	Total PHDEP Funding Expended (sum of the activities)	50% Obligation of Total Grant Funds by Activity #	Total PHDEP Funding Obligated (sum of the activities)
<i>e.g Budget Line Item # 9120</i>	<i>Activities 1, 3</i>		<i>Activity 2</i>	
9110		43,200		43,200
9120				
9130				
9140				
9150				
9160				
9170				
9180				
9190		8,395		8,395
TOTAL		\$51,595		\$51,595

Section 4: Certifications

A comprehensive certification of compliance with respect to the PHDEP Plan submission is included in the “PHA Certifications of Compliance with the PHA Plan and Related Regulations.”