

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

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# PHA Plans

Annual Plan for Fiscal Year 2001

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

**PHA Plan  
Agency Identification**

**PHA Name:** Fort Walton Beach Housing Authority

**PHA Number:** FL069

**PHA Fiscal Year Beginning:** 07/2001

**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)

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)

**Annual PHA Plan**  
**PHA Fiscal Year 2001**  
[24 CFR Part 903.7]

**Annual Plan Type:**

**Standard Plan**

**Streamlined Plan:**

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

**Troubled Agency Plan**

**Executive Summary of the Annual PHA Plan**

[24 CFR Part 903.7 9 (r)]

The Housing Authority has had great success with both the security fence and gate installed under the Safe Neighborhood Grant Program and outsourcing of its Maintenance operations. The Housing Authority intends to continue funding these initiatives through a combination of the Operating Fund, Capital Fund, and Drug Elimination Grant.

**Summary of Policy and Program Changes**

The Housing Authority has implemented the new earned income exclusion regulations. The Fiscal Year 2000 Capital Fund budget is being revised to use a small portion to further the agency's Section 504 compliance; however, the amount to be used for this added non-emergency work item is under the level that would cause it to be a "substantial modification," which would require an additional public hearing. There have been no other significant policy or program changes, nor are any intended at this time.

## Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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### **Attachments**

#### Required Attachments:

- Admissions Policy for Deconcentration — *Attachment B*
- Definition of “substantial deviation” and “significant amendment” — *Attachment D*
- Resident Membership on PHA Governing Board — *Attachment E*
- Membership of Resident Advisory Board — *Attachment F*
- FY 2000 Capital Fund Program Annual Statement — *Attachment G*
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

#### Optional Attachments:

- PHA Management Organizational Chart — *Attachment C*
- FY 2000 Capital Fund Program 5 Year Action Plan
- Public Housing Drug Elimination Program (PHDEP) Plan — *Attachment A*
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)

\_\_\_\_ Other (List below, providing each attachment name)

## Supporting Documents Available for Review

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	Annual Plan: Rent

Applicable & On Display	Supporting Document	Applicable Plan Component
	development check here if included in the public housing A & O Policy	Determination
X	Section 8 rent determination (payment standard) policies X check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures 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, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
N/A	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
N/A	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
N/A	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
N/A	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
N/A	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
N/A	Policies governing any Section 8 Homeownership program check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
N/A	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
N/A	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
N/A	Most recent self-sufficiency (ED/SS, TOP or ROSS or other	Annual Plan: Community

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

# 1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

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

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Location
Income <= 30% of AMI	8,262	5	5	5	1	5	5
Income >30% but <=50% of AMI	5,049	5	5	5	1	4	5
Income >50% but <80% of AMI	5,278	5	5	4	1	3	3
Elderly	2,409	4	5	4	4	1	5
Families with Disabilities	2,983	5	5	5	5	1	5
Black	2,754	3	5	4	1	4	3
White	19,278	2	5	3	1	2	1
Hispanic	229	3	5	4	1	4	3
Other	688	3	5	4	1	4	3

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: 1999-2000
- U.S. Census data: the Comprehensive Housing Affordability Strategy (“CHAS”) dataset
- American Housing Survey data  
Indicate year: 1997
- Other housing market study  
Indicate year: \_\_\_\_\_
- Other sources: (list and indicate year of information)

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one) <input type="checkbox"/> Section 8 tenant-based assistance <input checked="" type="checkbox"/> Public Housing <input type="checkbox"/> Combined Section 8 and Public Housing <input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional) If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	22		100
Extremely low income <=30% AMI	18	82%	
Very low income (>30% but <=50% AMI)	4	18%	
Low income (>50% but <80% AMI)	0	0%	
Families with children	11	50%	
Elderly families	2	9%	
Families with Disabilities	1	5%	
Black	10	45%	
White	11	50%	
Hispanic	1	5%	
Other	0	0%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	12	55%	2
2 BR	10	45%	18
3 BR	2	9%	19
4 BR			4
5 BR			
5+ BR			
Is the waiting list closed (select one)? No <input checked="" type="checkbox"/> Yes If yes: <b>B.</b> 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			

### Housing Needs of Families on the Waiting List

Waiting list type: (select one)

- Section 8 tenant-based assistance  
 Public Housing  
 Combined Section 8 and Public Housing  
 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	159		48
Extremely low income <=30% AMI	142	89%	
Very low income (>30% but <=50% AMI)	16	10%	
Low income (>50% but <80% AMI)	1	1%	
Families with children	113	71%	
Elderly families	6	4%	
Families with Disabilities	62	39%	
Black	60	38%	
White	79	50%	
Hispanic	8	5%	
Other	8	5%	

Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			

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

If yes:

**B.** 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

### (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:**

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

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

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

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

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

- 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**

- 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:**

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

**Need: Specific Family Types: Families with Disabilities**

**Strategy 1: Target available assistance to Families with Disabilities:**

- Seek designation of public housing for families with disabilities
- Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing
- Apply for special-purpose vouchers targeted to families with disabilities, should they become available
- Affirmatively market to local non-profit agencies that assist families with disabilities
- Other: (list below)

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

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

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

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

- Counsel section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units
- Market the section 8 program to owners outside of areas of poverty /minority concentrations
- Other: (list below)

**Other Housing Needs & Strategies: (list needs and strategies below)**

**(2) Reasons for Selecting Strategies**

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

- Funding constraints
- Staffing constraints
- Limited availability of sites for assisted housing
- Extent to which particular housing needs are met by other organizations in the community
- Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
- Influence of the housing market on PHA programs
- Community priorities regarding housing assistance
- Results of consultation with local or state government
- Results of consultation with residents and the Resident Advisory Board
- Results of consultation with advocacy groups
- Other: (list below)

**2. Statement of Financial Resources**

[24 CFR Part 903.7 9 (b)]

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2001 grants)</b>		
a) Public Housing Operating Fund	316,843	
b) Public Housing Capital Fund	336,613	
c) HOPE VI Revitalization	N/A	
d) HOPE VI Demolition	N/A	
e) Annual Contributions for Section 8 Tenant-Based Assistance	1,968,207	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	42,750	
g) Resident Opportunity and Self-Sufficiency Grants	N/A	
h) Community Development Block Grant	N/A	
i) HOME	N/A	
Other Federal Grants (list below)	N/A	
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
CFP 501-00	331,226	Public Housing Operations Public Housing Capital Imp. Public Housing Security
CIAP 913-99	120,745	
FL069-003	1,308,959	
<b>3. Public Housing Dwelling Rental Income</b>		
69-1 & 69-2	301,215	Public Housing Operations
<b>4. Other income (list below)</b>		
Interest	10,982	Public Housing Operations
<b>5. Non-federal sources (list below)</b>		
	N/A	
<b>Total resources</b>	<b>4,737,540</b>	



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

[24 CFR Part 903.7 9 (c)]

#### **A. Public Housing**

##### **(1) Eligibility**

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

\_\_\_ When families are within a certain number of being offered a unit: (state number)

\_\_\_ When families are within a certain time of being offered a unit: (state time)

Other: Immediately upon application

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

Criminal or Drug-related activity

Rental history

\_\_\_ Housekeeping

\_\_\_ Other (describe)

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

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

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

**(2)Waiting List Organization**

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

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

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

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

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

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

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

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

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

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

**(3) Assignment**

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

- One
- Two
- Three or More

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

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

**(4) Admissions Preferences**

a. Income targeting:

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

b. Transfer policies:

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

Emergencies

Overhoused

Underhoused

Medical justification

Administrative reasons determined by the PHA (e.g., to permit modernization work)

Resident choice: (state circumstances below)

Other: (list below)

a. Preferences

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

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

Former Federal preferences:

Involuntary Displacement (Disaster, Government Action, Action of Housing

Owner, Inaccessibility, Property Disposition)

Victims of domestic violence

Substandard housing

Homelessness

High rent burden (rent is > 50 percent of income)

Other preferences: (select below)

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

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

Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

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

4. Relationship of preferences to income targeting requirements:

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

**(5) Occupancy**

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

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

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

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

**(6) Deconcentration and Income Mixing**

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

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

If yes, list these developments as follows:

Deconcentration Policy for Covered Developments			
Development Name	Number of Units	Explanation (if any) [see step 4 at §903.2(c)(1)(iv)]	Deconcentration policy (if no explanation) [see step 5 at §903.2(c)(1)(iv)]

**B. Section 8**

**(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: Previous address

**(2) Waiting List Organization**

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

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

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

- PHA main administrative office
- Other (list below)

**(3) Search Time**

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

If yes, state circumstances below: Voucher holder must provide proof of the efforts that have been made to locate a suitable unit.

**(4) Admissions Preferences**

a. Income targeting

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

b. Preferences

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

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

Former Federal preferences

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

Other preferences (select all that apply)

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

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

Date and Time

Former Federal preferences

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

Other preferences (select all that apply)

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

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

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

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

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

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

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

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

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

- The Section 8 Administrative Plan
- Briefing sessions and written materials
- Other (list below)

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

- Through published notices
- Other (list below)

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

[24 CFR Part 903.7 9 (d)]

#### **A. Public Housing**

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

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

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

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

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

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

For the earned income of a previously unemployed household member, for one year

For increases in earned income, for six months IF increase was reported timely

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 —  
HEALTH INSURANCE PREMIUMS ONLY.

Other (describe below)

e. Ceiling rents

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

Yes for all developments

Yes but only for some developments

No

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

For all developments

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

For specified general occupancy developments

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

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

Other (list below)

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

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

f. Rent re-determinations:

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

- Never
- At family option
- Any time the family experiences an income increase
- Any time a family experiences an income increase above a threshold amount or percentage: 10%
- Other: Any time there is a change in family composition

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

## **(2) Flat Rents**

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

- The section 8 rent reasonableness study of comparable housing
- Survey of rents listed in local newspaper
- Survey of similar unassisted units in the neighborhood
- Other: Cost of operation

## B. Section 8 Tenant-Based Assistance

### (1) Payment Standards

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: HUD-published Fair Market Rents

**(2) Minimum Rent**

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

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

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

**5. Operations and Management**

[24 CFR Part 903.7 9 (e)]

**A. PHA Management Structure**

(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**

<b>Program Name</b>	<b>Units or Families Served at Year Beginning</b>	<b>Expected Turnover</b>
Public Housing	155	43
Section 8 Vouchers	606	48
Section 8 Certificates	10	0
Section 8 Mod Rehab	0	0
Special Purpose Section 8 Certificates/Vouchers (list individually)	0	0
Public Housing Drug Elimination Program (PHDEP)	123	0
Other Federal Programs(list individually)		

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

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

- Admissions and Continuing Occupancy Policy
- Rent Collection Policy
- Pet Policy
- Maintenance Plan
- No-Trespass Policy

(2) Section 8 Management: (list below)

- Section 8 Administrative Plan

## **6. PHA Grievance Procedures**

[24 CFR Part 903.7 9 (f)]

### **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)]

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

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

Select one:

The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment G.

-or-

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

### **Component 7**

#### **Capital Fund Program Annual Statement**

#### **Parts I, II, and III**

**(2) Optional 5-Year Action Plan**

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

b. If yes to question a, select one:

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

-or-

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

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

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

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

1. Development name:

2. Development (project) number:

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

Revitalization Plan under development

Revitalization Plan submitted, pending approval

Revitalization Plan approved

Activities pursuant to an approved Revitalization Plan underway

Yes  No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?  
If yes, list development name/s below:

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

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

## 8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

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

### 2. Activity Description

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

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

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

[24 CFR Part 903.7 9 (i)]

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

2. Activity Description

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

<b>Designation of Public Housing Activity Description</b>
1a. Development name: 1b. Development (project) number:
2. Designation type: <input type="checkbox"/> 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
3. Application status (select one) <input type="checkbox"/> Approved; included in the PHA’s Designation Plan <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application
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?
1. 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)]

### 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?

Assessment underway

Assessment results submitted to HUD

Assessment results approved by HUD (if marked, proceed to next question)

Other (explain below)

3.  Yes  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)

Conversion Plan in development

Conversion Plan submitted to HUD on: (DD/MM/YYYY)

Conversion Plan approved by HUD on: (DD/MM/YYYY)

Activities pursuant to HUD-approved Conversion Plan underway

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

Units addressed in a pending or approved demolition application (date submitted or approved:

Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: )

Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: )

Requirements no longer applicable: vacancy rates are less than 10 percent

Requirements no longer applicable: site now has less than 300 units

Other: (describe below)

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

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

## 11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

### A. Public Housing

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

#### 2. Activity Description

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

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

**B. Section 8 Tenant Based Assistance**

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

2. Program Description:

a. Size of Program

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

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

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

b. PHA-established eligibility criteria

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

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

[24 CFR Part 903.7 9 (1)]

### 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)
FreeZone, Eleanor J. Johnson Youth Center	70	first come, first served	Youth Center in Charlie Hill Terrace	both
ROSS Grant Program	6	first come, first served	Youth Center in Charlie Hill Terrace	both



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

**(NONE TO REPORT)**

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)]

#### 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 use 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)

Germany Terrace

**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)  
Working with City to cul-de-sac Methodist Avenue to prevent free flow of drug-related traffic.
2. Which developments are most affected? (list below)
- Germany Terrace

**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)  
both

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

- Yes  No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes  No: Has the PHA included the PHDEP Plan for FY 2000 in this PHA Plan?
- Yes  No: This PHDEP Plan is an Attachment. (Attachment Filename: FL069a01.wpd)

**14. RESERVED FOR PET POLICY**

[24 CFR Part 903.7 9 (n)]



## 16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

1.  Yes  No: Is the PHA required to have an audit conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h))? (If no, skip to component 17.)
2.  Yes  No: Was the most recent fiscal audit submitted to HUD?
3.  Yes  No: Were there any findings as the result of that audit?
4.  Yes  No: If there were any findings, do any remain unresolved?  
If yes, how many unresolved findings remain? \_\_\_\_\_
5.  Yes  No: Have responses to any unresolved findings been submitted to HUD?  
If not, when are they due (state below)?

## 17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

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)

Provided below:

- 1) More lighting is needed in certain areas.
- 2) Children disturbing the peace at night is a problem.
- 3) More activities for the elderly and children are needed.

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

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

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

List changes below:

Other: (list below)

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

1. \_\_\_ Yes    **X** No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)
2. \_\_\_ Yes    **X** No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)

3. Description of Resident Election Process

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

- \_\_\_ Candidates were nominated by resident and assisted family organizations  
\_\_\_ Candidates could be nominated by any adult recipient of PHA assistance  
\_\_\_ Self-nomination: Candidates registered with the PHA and requested a place on ballot  
\_\_\_ Other: (describe)

b. Eligible candidates: (select one)

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

c. Eligible voters: (select all that apply)

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

**C. Statement of Consistency with the Consolidated Plan**

1. Consolidated Plan jurisdiction: **City of Fort Walton Beach**

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

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

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

As part of their planning process, the City asked the Housing Authority to complete a survey of demographics and needs. Their Consolidated Plan has not yet been finalized, but to our knowledge, it does not contain any commitments to the Housing Authority.

**D. Other Information Required by HUD**

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

## **Attachments**

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

**ATTACHMENT "A"**  
**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 \$38,270**

**B. Eligibility type (Indicate with an "x")**      N1 \_\_\_\_\_ N2 \_\_\_\_\_ R   X  

**C. FFY in which funding is requested:**    2001

**D. Executive Summary of Annual PHDEP Plan**

The Housing Authority desires to maintain the diminished crime levels in Charlie Hill Terrace as a result of the installation of security gates installed in 1998 with funding from the now-discontinued Safe Neighborhood Grant Program. Virtually all of the FFY 2001 PHDEP funding will be used to continue contracting with a security company to man the gates, with only a nominal amount reserved for the HUD-mandated management review. The Housing Authority intends to pursue this course of action during the upcoming years covered by the current Five-Year Plan.

**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)
Charlie Hill Terrace	124	374

**F. Duration of Program**

6 Months \_\_\_\_\_ 12 Months   X   18 Months \_\_\_\_\_ 24 Months \_\_\_\_\_ Other \_\_\_\_\_

## G. PHDEP Program History

Fiscal Year of Funding	PHDEP Funding	Grant #	Fund Balance	Grant Funding	Anticipated Termination Date
FY 1996	X	FL29-P069-0196	0	\$87,000	
FY 1997	X	FL29-P069-0197	0	\$52,200	12/31/99
FY 1998	X	FL29-P069-0198	\$46,124.36	\$51,300	9/30/00
FY 1999	X	FL29-P069-0199	\$38,270.00	\$38,270	9/30/00
FY 2000	X	FL29-P069-0100	\$38,270.00	\$38,270	9/30/01

## Section 2: PHDEP Plan Goals and Budget

### A. PHDEP Plan Summary

FFY 2001 PHDEP funding levels will allow the Housing Authority to pursue only one strategy: keep drug traffickers and those convicted of other crimes out of Housing Authority property by maintaining a contract with a security company to man the security gates.

### B. PHDEP Budget Summary

FY 2001 PHDEP Budget Summary	
Budget Line Item	Total Funding
9110 - Reimbursement of Law Enforcement	
9120 - Security Personnel	\$37,950
9130 - Employment of Investigators	
9140 - Voluntary Tenant Patrol	
9150 - Physical Improvements	
9160 - Drug Prevention	
9170 - Drug Intervention	
9180 - Drug Treatment	
9190 - Other Program Costs	\$4,800
<b>TOTAL PHDEP FUNDING</b>	<b>\$42,750</b>

**A. PHDEP Plan Goals and Activities**

<b>9120 - Security Personnel</b>						<b>Total PHDEP Funding: \$ 37,950</b>	
Goal(s)		Maintain low levels of drug traffic into complex					
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHDEP Funding	Other Funding (Amount /Source)	Performance Indicators
1. Security guard contract			10/01/01	02/28/02	\$37,950	Unknown	Local crime statistics
2.							
3.							

<b>9160 - Drug Prevention</b>						<b>Total PHDEP Funding: - 0 -</b>	
Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHDEP Funding	Other Funding (Amount /Source)	Performance Indicators
2.							
3.							

<b>9190 - Other Program Costs</b>						<b>Total PHDEP Funds: \$ 4,800</b>	
Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHDEP Funding	Other Funding (Amount /Source)	Performance Indicators
1. Financial Management					2,800	N/A	N/A
2. Management Review					2,000	N/A	N/A
3.							



**Section 3: Expenditure/Obligation Milestones**

<b>Budget Line Item #</b>	<b>25% Expenditure of Total Grant Funds By Activity #</b>	<b>Total PHDEP Funding Expended (sum of the activities)</b>	<b>50% Obligation of Total Grant Funds by Activity #</b>	<b>Total PHDEP Funding Obligated (sum of the activities)</b>
<i>e.g Budget Line Item # 9120</i>	<i>Activities 1, 3</i>		<i>Activity 2</i>	
9110	--	--	--	--
9120	Activity 1	\$37,950	Activity 1	\$37,950
9130	--	--	--	--
9140	--	--	--	--
9150	--	--	--	--
9160	--	--	--	--
9170	--	--	--	--
9180	--	--	--	--
9190	--	--	--	--
<b>TOTAL</b>		\$37,950		\$37,950

**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.”

## ATTACHMENT “B” TO AGENCY PLAN

### Deconcentration

It is the desire and intention of the Fort Walton Beach Housing Authority to furnish safe, affordable housing to those in our communities who may not otherwise be able to secure adequate shelter for themselves and their families.

While the low- and extremely-low income remain our target group and main focus, the Housing Authority will endeavor to provide housing in a manner consistent with the premise of striking down economically concentrated areas.

Centrally located in *Census Tract 226*, Charlie Hill Terrace and Germany Terrace currently share similar demographics with nominal or even nonexistent differences in average income and racial density (documentation attached for public review). For this reason, the Housing Authority of the City of Fort Walton Beach sees no need to implement an exacting Deconcentration Plan at this time.

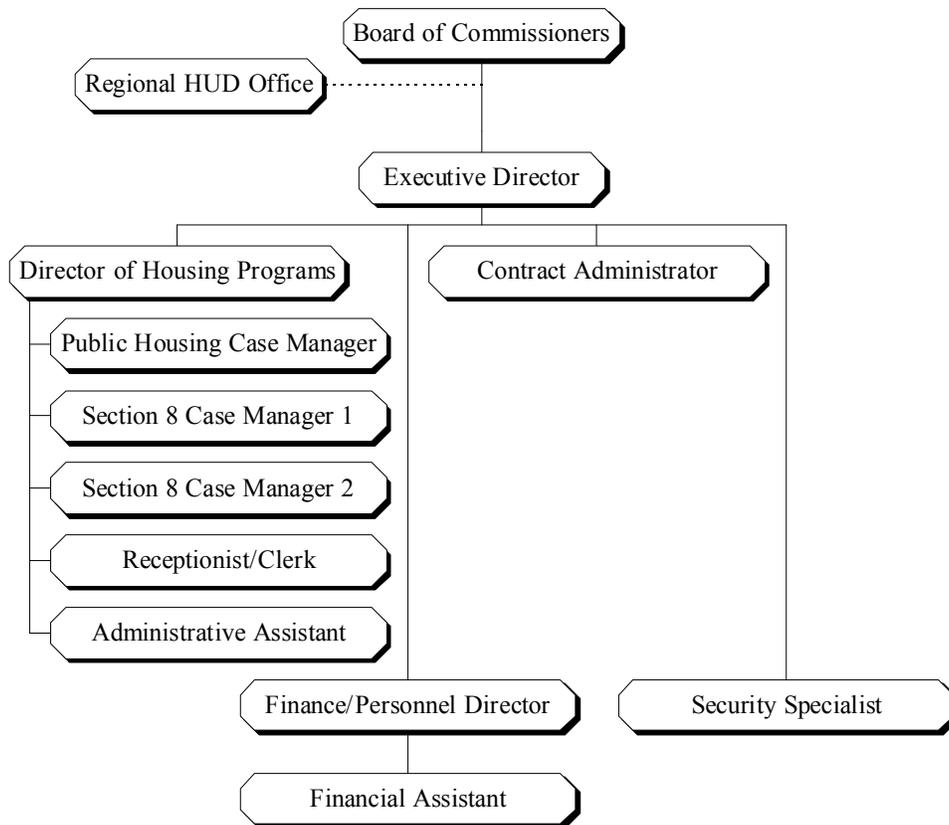
However, it is heretofore the policy of this Housing Authority to review pertinent demographic information pertaining to Charlie Hill Terrace and Germany Terrace on a semi-annual basis. Should a significant difference in median income or racial concentration exist between the two complexes, the situation will be reviewed within 30 days by Housing Authority staff and appropriate measures taken to implement an appropriate plan of deconcentration. The Plan will be passed by resolution of the Board of Commissioners within 60 days of said situation(s) occurrence.

For the purpose of this policy semi-annual shall mean within the months of July and December, both of which shall occur in the same fiscal year. Significant difference shall mean a variance of 25% or more in average income when demographic factors are compared between Charlie Hill Terrace and Germany Terrace or shall mean a variance of 30% or more in race/ethnicity concentration between the two complexes.

This plan shall be conspicuously posted and remain available for public review.

# ATTACHMENT "C" TO AGENCY PLAN

## Management Organization Chart



## **ATTACHMENT “D” TO AGENCY PLAN**

### **Definition of “Substantial Deviation” and “Significant Amendment or Modification”**

Public Housing Authorities are required to delineate the conditions under which an Annual Plan or 5-Year Plan must be resubmitted to the full public process. A “Substantial Deviation” shall refer to the inclusion of certain activities, as defined below, in a particular Annual Plan that are outside of the agency’s goals as stated in the applicable 5-Year Plan. A “Significant Amendment or Modification” shall mean certain activities, defined below, undertaken by the agency outside of those specified in the applicable Annual Plan.

The inclusion of any of the following activities in the Annual Plan for any given fiscal year will constitute a “Substantial Deviation” from the 5-Year Plan:

- Demolition/disposition of public housing units
- Designation of public housing units for elderly or disabled persons
- Creation of a homeownership program
- Conversion of public housing the Section 8 assistance

Any of the following activities shall constitute a “Significant Amendment or Modification” if not included in the Annual Plan for the fiscal year in which the activity is undertaken:

- Changes to rent determination or admissions policies
- Changes to the organization of a waiting list
- Addition of a non-emergency work item under the Capital Fund comprising more than 15% of the annual Capital Fund budget
- Addition of activities not included in the PHDEP Plan
- Entering a public-private housing partnership

Both “Substantial Deviations” and “Significant Amendments or Modifications” shall require the Housing Authority to undertake a full, additional public process. Any policy adopted or activity undertaken to reflect changes in HUD regulatory requirements will NOT be considered either a “Substantial Deviation” or a “Significant Amendment or Modification.”

## **ATTACHMENT “E” TO AGENCY PLAN**

### **Resident Membership of the PHA Governing Board**

Ms Mae Wilcher is the resident commissioner. Commissioners are appointed by the City of Fort Walton Beach. Ms Wilcher was appointed to a four-year term, effective April 25, 2001.

## **ATTACHMENT “F” TO AGENCY PLAN**

### **Membership of the Resident Advisory Board**

On June 19, 2001, the Housing Authority conducted a resident meeting in an attempt to organize a Resident Advisory Board (RAB). Although all residents were informed of the meeting in advance, only six attended. Ms Mae Wilcher nominated Ms Merry Kremmel to the position of Vice-President. Ms Kremmel was unanimously elected to the position by those residents in attendance. No one volunteered or was nominated for the positions of president, secretary, and treasurer.

Residents attending the meeting:

Merry Kremmel  
Mae Wilcher  
Mary Youngblood  
Bessie Smedley  
Nell Raymond  
Inez Simmons

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

PHA Name: Fort Walton Beach Housing Authority	Grant Type and Number Capital Fund Program Grant No: FL29-P069-913-99 Replacement Housing Factor Grant No:	Federal FY of Grant: 1999
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Original Annual Statement  Reserve for Disasters/ Emergencies  Revised Annual Statement (revision no: )  
 Performance and Evaluation Report for Period Ending: 12/31/2000  Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	33,108.06		2,549.50	377.52
3	1408 Management Improvements	37,480.73		34,872.00	17,265.89
4	1410 Administration	21,232.76		7,143.74	4,957.63
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	8,000.00		8,000.00	6,965.00
8	1440 Site Acquisition				
9	1450 Site Improvement	47,835.04		21,830.27	11,588.79
10	1460 Dwelling Structures	150,674.18		120,674.18	108,250.64
11	1465.1 Dwelling Equipment—Nonexpendable	31,191.00		20,736.00	20,638.00
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	19,199.23		12,170.23	12,170.23
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	348,721.00		227,975.92	182,213.70
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs	34,872.00		34,872.00	17,265.89
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures	104,400.46		104,400.46	82,565.71

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

PHA Name: Fort Walton Beach Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29-P069-913-99 Replacement Housing Factor Grant No:			Federal FY of Grant: 1999			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA-WIDE	Operations	1406	1	33,108.06		2,549.50	377.52	
FL69-1	Security Gate Monitoring	1408	1	34,872.00		34,872.00	17,265.89	
HA-WIDE	Software Upgrades	1408	1	2,608.73		0.00	0.00	
“	Administration	1410	1	21,232.76		7,143.74	4,957.63	
“	Fees & Costs	1430	1	8,000.00		8,000.00	6,965.00	
FL69-1	Water Shut-off Valves	1450	24	26,835.04		830.27	0.00	
HA-WIDE	Geothermal Well Drilling	1450	1	21,000.00		21,000.00	11,588.79	
“	Central A/C	1460	1	83,400.46		83,400.46	70,976.92	
“	Unit Turnover	1460	30	36,231.72		36,231.72	36,231.72	
FL69-2	Gas Meter Replacement	1460	50	1,042.00		1,042.00	1,042.00	
HA-WIDE	Maint. Operations Contract	1460	1	30,000.00		0.00	0.00	
“	Stoves	1465	60	13,511.00		9,681.00	9,583.00	
“	Refrigerators	1465	50	17,680.00		11,055.00	11,055.00	
“	Maintenance Truck	1475	1	11,737.00		11,737.00	11,737.00	
“	Network Hub	1475	1	433.23		433.23	433.23	
“	Riding Lawn Mower	1475	1	7,029.00		0.00	0.00	



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

PHA Name: Fort Walton Beach Housing Authority	Grant Type and Number Capital Fund Program Grant No: F129-P069-501-00 Replacement Housing Factor Grant No:	Federal FY of Grant: 2000
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Original Annual Statement  Reserve for Disasters/ Emergencies  Revised Annual Statement (revision no: 1)  
 Performance and Evaluation Report for Period Ending: 12/31/2000  Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	32,680.00	190,680.00	0.00	0.00
3	1408 Management Improvements	33,123.00	33,123.00	0.00	0.00
4	1410 Administration	33,123.00	33,123.00	0.00	0.00
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	8,000.00	8,000.00	0.00	0.00
8	1440 Site Acquisition				
9	1450 Site Improvement	20,000.00	10,000.00	0.00	0.00
10	1460 Dwelling Structures	158,000.00	10,000.00	0.00	0.00
11	1465.1 Dwelling Equipment—Nonexpendable	25,000.00	25,000.00	0.00	0.00
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	12,000.00	12,000.00	0.00	0.00
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	9,300.00	9,300.00	0.00	0.00
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	331,226.00	331,226.00	0.00	0.00
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance	0.00	10,000.00	0.00	0.00
24	Amount of line 21 Related to Security – Soft Costs	33,123.00	33,123.00	0.00	0.00
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: Fort Walton Beach Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29-P069-501-00 Replacement Housing Factor Grant No:				Federal FY of Grant: 2000		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA-WIDE	Other Operations	1406	1	32,680.00	32,680.00	0.00	0.00	
“	Maint. Operations Contract	1406	1	0.00	158,000.00	0.00	0.00	
FL69-1	Security Gate Monitoring	1408	1	33,123.00	33,123.00	0.00	0.00	
HA-WIDE	Administration	1410	1	33,123.00	33,123.00	0.00	0.00	
“	Fees & Costs	1430	1	8,000.00	8,000.00	0.00	0.00	
“	Shrubbery	1450	1	20,000.00	10,000.00	0.00	0.00	
“	Maint. Operations Contract	1460	1	158,000.00	0.00	0.00	0.00	
“	504 Compliance	1460	2	0.00	10,000.00	0.00	0.00	
“	Refrigerators	1465	50	15,000.00	15,000.00	0.00	0.00	
“	Stoves	1465	40	10,000.00	10,000.00	0.00	0.00	
“	Capital Equipment – Admin.	1475	1	12,000.00	12,000.00	0.00	0.00	
“	Relocation Costs	1495	93	9,300.00	9,300.00	0.00	0.00	



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

PHA Name: Fort Walton Beach Housing Authority	Grant Type and Number Capital Fund Program Grant No: FL29-P069-501-01 Replacement Housing Factor Grant No:	Federal FY of Grant: 2001
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Original Annual Statement  Reserve for Disasters/ Emergencies  Revised Annual Statement (revision no: )  
 Performance and Evaluation Report for Period Ending:  Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	224,000.00			
3	1408 Management Improvements	33,661.00			
4	1410 Administration	28,952.00			
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement	20,000.00			
10	1460 Dwelling Structures	30,000.00			
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	336,613.00			
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance	30,000.00			
24	Amount of line 21 Related to Security – Soft Costs	33,661.00			
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				





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

PHA Name: Fort Walton Beach Housing Authority	Grant Type and Number Capital Fund Program Grant No: FL29-P069-003 Replacement Housing Factor Grant No:	Federal FY of Grant: 1991
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Original Annual Statement  Reserve for Disasters/ Emergencies  Revised Annual Statement (revision no: 2 )  
 Performance and Evaluation Report for Period Ending: 12/31/2000  Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements	0.00	73,482.68	0.00	0.00
4	1410 Administration	126,095.58	143,936.00	143,936.00	100,932.82
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	57,334.50	61,593.50	40,484.25	0.00
8	1440 Site Acquisition				
9	1450 Site Improvement	204,992.50	211,913.50	0.00	0.00
10	1460 Dwelling Structures	1,713,345.59	1,509,235.51	963,154.54	289,235.89
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures	393,191.83	433,470.02	53,266.12	27,766.12
13	1475 Nondwelling Equipment	0.00	76,168.79	0.00	0.00
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	14,840.00	0.00	0.00	0.00
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	2,509,800.00	2,509,800.00	1,200,840.91	417,934.83
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs	0.00	44,619.22	0.00	0.00
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures	965,579.54	964,879.54	954,354.54	281,435.89

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

PHA Name: Fort Walton Beach Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29-P069-003 Replacement Housing Factor Grant No:				Federal FY of Grant: 1991		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA-WIDE	Security Gate Monitoring	1408	1	0.00	44,619.22	0.00	0.00	
“	Maintenance Contract	“	1	0.00	28,863.46	0.00	0.00	
“	Administration	1410	1	126,095.58	143,936.00	143,936.00	100,932.82	
“	Fees & Costs	1430	1	57,334.50	61,593.50	40,484.25	0.00	
“	Brick Work Repair	1450	1	25,000.00	8,785.00	0.00	0.00	
“	Security Lighting	“	1	25,000.00	16,386.50	0.00	0.00	
“	Landscaping	“	1	120,000.00	173,157.00	0.00	0.00	
FL69-1	Privacy Fence	“	1	4,992.50	4,150.00	0.00	0.00	
FL69-2	Security Improvements	“	1	30,000.00	9,435.00	0.00	0.00	
HA-WIDE	Geothermal Air Conditioning	1460	142	965,579.54	964,879.54	954,354.54	281,435.89	
“	Unit Turnover	“	8	5,700.00	5,700.00	5,700.00	5,700.00	
FL69-1	Waste Plumbing Upgrades	“	1	78,969.33	65,774.50	1,000.00	0.00	
HA-WIDE	Carpet & Tile	“	1	235,885.00	134,895.00	0.00	0.00	
“	Electric Infrastructure	“	1	237,187.05	211,492.00	0.00	0.00	
“	Ground Fault Interrupts	“	75	15,075.00	3,750.00	0.00	0.00	
“	Interior Door Replacement	“	505	64,800.00	27,872.71	0.00	0.00	
“	Vinyl Siding Over Old A/C Panels	“	107	11,375.00	5,350.00	0.00	0.00	
“	Kitchen Sink Replacement	“	123	0.00	13,421.76	0.00	0.00	
“	Unit Painting	“	76	75,000.00	76,100.00	2,100.00	2,100.00	
“	Contingency	“	1	23,774.67	0.00	0.00	0.00	
FL69-1	Laundry Facility	1470	1	53,266.12	53,266.12	53,266.12	27,766.12	
“	Office & Parking Lot Renovations	“	1	339,925.71	380,203.90	0.00	0.00	
HA-WIDE	Playground Equipment	1475	1	0.00	50,000.00	0.00	0.00	
“	Office Equipment	“	15	0.00	26,168.79	0.00	0.00	
“	Relocation Costs	1495	0	14,840.00	0.00	0.00	0.00	

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

PHA Name: Fort Walton Beach Housing Authority		Grant Type and Number Capital Fund Program No: FL29-P069-003 Replacement Housing Factor No:					Federal FY of Grant: 1991	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates	
	Original	Revised	Actual	Original	Revised	Actual		
HA-WIDE	6/30/2001			6/30/2002				
FL069-1	6/30/2001			6/30/2002				
FL069-2	6/30/2001			6/30/2002				