

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

PHA Plans

5 Year Plan for Fiscal Years 2001 - 2005

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: Medford Housing Authority

PHA Number: 015-001, 002, 004, 006

PHA Fiscal Year Beginning: (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)

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 2001 - 2005
[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)

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) 24.8 (Mass)
 - 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)
 - a) Improve aesthetic quality of living environment,
 - b) Strengthen financial position and reserves,

c) Improve development safety and security.

- Renovate or modernize public housing units:
- Demolish or dispose of obsolete public housing:
- Provide replacement public housing:
- Provide replacement vouchers:
- Other: (list below)
 - a) Improve aesthetic quality of living environment,
 - b) Strengthen financial position and reserves,
 - c) Improve development safety and security.

PHA Goal: Increase assisted housing choices

Objectives:

- Provide voucher mobility counseling:
- Conduct outreach efforts to potential voucher landlords
- Increase voucher payment standards
- Implement voucher homeownership program:
- Implement public housing or other homeownership programs:
- Implement public housing site-based waiting lists:
- Convert public housing to vouchers:
- Other: (list below)

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

PHA Goal: Provide an improved living environment

Objectives:

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

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

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

Objectives:

- Increase the number and percentage of employed persons in assisted families:

Provide or attract supportive services to improve assistance recipients' employability:

Provide or attract supportive services to increase independence for the elderly or families with disabilities.

Other: (list below)

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

PHA Goal: Ensure equal opportunity and affirmatively further fair housing
Objectives:

Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, 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)

Annual PHA Plan
PHA Fiscal Year 2001

[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 Medford Housing Authority is submitting this Agency Plan pursuant to the requirements of Section 511 of the Quality Housing and Work Responsibility Act of 1998.

We have attempted to establish realistic goals in relation to the needs and objectives of our community, as well as the available financial and staffing resources of the Authority, both at the present time and in the reasonably foreseeable future. Our most immediate objective is to maintain, protect, and improve the quality of the living environment for our current residents, and to provide a physical plant, financial policies, and management structure which will enable the Authority to continue to offer quality housing to its residents. We shall endeavor to promote adequate and affordable housing, and a suitable living environment free from discrimination, in a manner that will be economically and socially viable for our residents.

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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

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Attachments

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

Required Attachments:

- Attachment A: 1. Flat Rents, and 2. Definition of Substantial Deviation and Significant Amendment or Modification is included in the test.
- Deconcentration and Income Mixing

(ma015i02)

- Admissions Policy for Deconcentration
- FY 2001 Capital Fund Program Annual Statement (Inserted in Plan Component 7 A 1) (ma015a02)
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)
- Implementation of Public Housing Resident Community Service Requirements (ma015e02)
- Resident Satisfaction Follow-up Plan (ma015d02)
- Pet Policy (ma015c02)
- Summary of Progress (ma015f02)
- Resident Membership of the Medford Housing Authority Governing Body (ma015h02)

Optional Attachments:

- PHA Management Organizational Chart
- FY 2001 Capital Fund Program 5 Year Action Plan (ma015a02)
- Public Housing Drug Elimination Program (PHDEP) Plan (ma015b02)
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text) **Comments have been included in Plan text.**
- 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	Annual Plan:

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	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	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
		Annual Plan: Eligibility, Selection, and Admissions Policies
	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 <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant	Annual Plan: Capital Needs

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	Program Annual Statement (HUD 52837) for the active grant year	
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
	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
	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
	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 (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

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

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

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size	Location
Income <= 30% of AMI	2,009	5	5	2	2	2	2
Income >30% but <=50% of AMI	1,037	5	5	2	2	2	2
Income >50% but <80% of AMI	1,201	5	5	2	2	2	2
Elderly	2,418	5	5	2	2	2	2
Families with Disabilities	N/A	5	5	2	5	2	2
Race/Ethnicity (W)	7240	5	5	2	2	2	2
Race/Ethnicity (B)	312	5	5	2	2	2	2
Race/Ethnicity (H)	144	5	5	2	2	2	2
Race/Ethnicity	72	5	5	2	2	2	2
Race/Native Am.	11	5	5	2	2	2	2

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”) 1990
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)

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

State the housing needs of the families on the PHA's waiting list/s. **Complete one table for each type of PHA-wide waiting list administered by the PHA.** PHAs may provide separate tables for site-based or sub-jurisdictional public housing waiting lists at their option.

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	1,529		
Extremely low income <=30% AMI	835	55%	50
Very low income (>30% but <=50% AMI)	462	31%	15
Low income (>50% but <80% AMI)	232	16%	
Families with children	767	50%	
Elderly families	514	34%	
Families with Disabilities	248	16%	
Race/ethnicity (W)	883	58%	
Race/ethnicity (H)	157	11%	
Race/ethnicity (B)	334	22%	
Race/ethnicity (AS)	23	2%	
Other	132	8%	
Characteristics by Bedroom Size (Public Housing Only)			

Housing Needs of Families on the Waiting List			
1BR	749	49%	
2 BR	373	24%	
3 BR	338	22%	
4 BR	69	5%	
5 BR	0	–	
5+ BR	0	–	
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			

Housing Needs of Families on the Waiting List	
Waiting list type: (select one)	
<input checked="" type="checkbox"/>	Section 8 tenant-based assistance
<input type="checkbox"/>	Public Housing
<input type="checkbox"/>	Combined Section 8 and Public Housing
<input type="checkbox"/>	Public Housing Site-Based or sub-jurisdictional waiting list (optional)
If used, identify which development/subjurisdiction:	

	# of families	% of total families	Annual Turnover
Waiting list total	1,038	100	100
Extremely low income <=30% AMI	945	91%	90
Very low income (>30% but <=50% AMI)	83	8%	8
Low income (>50% but <80% AMI)	10	1%	2
Families with children	871	84%	
Elderly families	45	5%	
Families with			

Disabilities	122	12%	
Race/ethnicity (W)	394	38%	
Race/ethnicity (H)	165	16%	
Race/ethnicity (B)	411	40%	
Race/ethnicity (AS)	7	1%	
Other	61	6%	
Characteristics by Bedroom Size (Public Housing Only)	N/A		
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)? Almost 3 years			
Does the PHA expect to reopen the list in the PHA Plan year? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			

C. Strategy for Addressing Needs

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

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

Select all that apply

- Employ effective maintenance and management policies to minimize the number of public housing units off-line
- Reduce turnover time for vacated public housing units
- Reduce time to renovate public housing units
- Seek replacement of public housing units lost to the inventory through mixed finance development

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

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select all that apply

- Employ 3 preferences aimed at families who are working
- Adopt rent policies to support and encourage work
- Other: (list below)

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

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

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

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

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

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

Select if applicable

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

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

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

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

(2) Reasons for Selecting Strategies

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

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

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

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

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2000 grants)		
a) Public Housing Operating Fund	938,950	

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
b) Public Housing Capital Fund	1,003,364	
c) HOPE VI Revitalization	0	
d) HOPE VI Demolition	0	
e) Annual Contributions for Section 8 Tenant-Based Assistance	6,727,849	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	118,178	
g) Resident Opportunity and Self- Sufficiency Grants	0	
h) Community Development Block Grant	*116,200 *CDBG funds for State Developments	
i) HOME	0	
Other Federal Grants (list below)		
2. Prior Year Federal Grants (unobligated funds only) (list below)		
Capital Fund 2000	588,203	
PHDEP 1999	17,267	
PHDEP 2000	110,256	
3. Public Housing Dwelling Rental Income	1,607,040	
4. Other income (list below)		
Excess Utility	6,500	
Miscellaneous	9,400	
NonODwelling Rent	5,000	
Interest	117,980	
4. Non-federal sources (list below)		
MRVP		
Total resources	*11,366,187 *\$16,200 CDBG funds for State Developments only.	

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

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.79 (c)]

A. Public Housing

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

(1) Eligibility

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

- When families are within a certain number of being offered a unit: (state number)
- When families are within a certain time of being offered a unit: (state time) 60 Days
- 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) Not at this time, but probably in the future depending on practicality and ease of access.

(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)

c. Preferences

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

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

Former Federal preferences:

Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)

Victims of domestic violence

Substandard housing

Homelessness

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

Other preferences: (select below)

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

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families –**2nd Preference (Family Housing Only)**
- Residents who live and/or work in the jurisdiction –**1st Preference**
- 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: 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. 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:
- 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:
- Other (list policies and developments targeted below)

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

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

- Additional affirmative marketing
- Actions to improve the marketability of certain developments
- Adoption or adjustment of ceiling rents for certain developments

- Adoption of rent incentives to encourage deconcentration of poverty and income-mixing
- Other (list below)

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

- 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)

- 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)

(2) Waiting List Organization

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

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

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

- PHA main administrative office
- Other (list below)

(3) Search Time

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

If yes, state circumstances below:

If applicant can demonstrate diligent search efforts.

(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.

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)

b. 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

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

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

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

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

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

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

- For the earned income of a previously unemployed household member
 For increases in earned income
 Fixed amount (other than general rent-setting policy)
If yes, state amount/s and circumstances below:
 Fixed percentage (other than general rent-setting policy)

If yes, state percentage/s and circumstances below:

- For household heads
- For other family members
- For transportation expenses
- For the non-reimbursed medical expenses of non-disabled or non-elderly families
- Other (describe below)

e. Ceiling rents

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

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

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

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

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

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

f. Rent re-determinations:

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

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

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

(2) Flat Rents

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

- The section 8 rent reasonableness study of comparable housing
- Survey of rents listed in local newspaper
- Survey of similar unassisted units in the neighborhood
- Other (list/describe below)

See ATTACHMENT A for Flat Rents

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)

If necessary and appropriate, as needed and available.

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

- Success rates of assisted families
- Rent burdens of assisted families
- Other (list below)

(2) Minimum Rent

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

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

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

5. Operations and Management

[24 CFR Part 903.79 (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	481	42
Section 8 Vouchers	586	70
Section 8 Certificates	0	5
Section 8 Mod Rehab	0	0
Special Purpose Section 8 Certificates/Vouchers (list individually)	284 Enhanced	0
Public Housing Drug Elimination Program (PHDEP)	150	N/A
Other Federal Programs(list individually)	N/A	N/A

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)

- Master Management Resolution (includes Eligibility and Admissions Policy, Procurement Policy, and Personnel Policy)
- Resident Handbook (including schedule of Maintenance Charges)
- Maintenance Plan and Preventive Maintenance Schedule (including measures for prevention or eradication of pest infestation)
- Capital Fund Program Five Year Action Plan
- Grievance/Hearing Procedure
- Pet Policy
- Section 8 Administrative Plan
- State Sanitary Code

(2) Section 8 Management: (list below)

- Section 8 Administrative Plan
- Grievance/Hearing Procedure
- State Sanitary Code

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

Exemptions from component 6: High performing PHAs are not required to complete component 6. Section 8-Only PHAs are exempt from sub-component 6A.

A. Public Housing

1. Yes No: Has the PHA established any written grievance procedures in addition to federal requirements found at 24 CFR Part 966, Subpart B, for residents of public housing?

If yes, list additions to federal requirements below:

2. Which PHA office should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)

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

B. Section 8 Tenant-Based Assistance

1. Yes No: Has the PHA established informal review procedures for applicants to the Section 8 tenant-based assistance program and informal hearing procedures for families assisted by the Section 8 tenant-based assistance program in addition to federal requirements found at 24 CFR 982?

If yes, list additions to federal requirements below:

2. Which PHA office should applicants or assisted families contact to initiate the informal review and informal hearing processes? (select all that apply)

- PHA main administrative office
 Other (list below)

7. Capital Improvement Needs

[24 CFR Part 903.79 (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

-or-

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

(2) Optional 5-Year Action Plan

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

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

b. If yes to question a, select one:

- The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state name ma015a02)

-or-

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

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

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

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

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

1. Development name:
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)]

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

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

2. Activity Description

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

Demolition/Disposition Activity Description	
1a. Development name:	
1b. Development (project) number:	
2. Activity type: Demolition <input type="checkbox"/>	
Disposition <input type="checkbox"/>	
3. Application status (select one)	
Approved <input type="checkbox"/>	
Submitted, pending approval <input type="checkbox"/>	
Planned application <input type="checkbox"/>	
4. Date application approved, submitted, or planned for submission: (DD/MM/YY)	
5. Number of units affected:	
6. 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)]

Exemptions from Component 9; Section 8 only PHAs are not required to complete this section.

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

2. Activity Description

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

Designation of Public Housing Activity Description	
1a. Development name:	Tempone Manor
1b. Development (project) number:	015-006
2. Designation type:	Occupancy by only the elderly <input checked="" type="checkbox"/> Except for modified handicapped units. 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 checked="" type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission:	<u>12/01/01</u>
5. If approved, will this designation constitute a (select one)	<input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected:	100
7. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

Designation of Public Housing Activity Description

1a. Development name: 15 Canal Street and 92-94 Fellsway West 1b. Development (project) number: 015-004
2. Designation type: Occupancy by only the elderly <input type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input checked="" type="checkbox"/>
3. Application status (select one) Approved; included in the PHA's Designation Plan <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <u>(12/01/01)</u>
5. If approved, will this designation constitute a (select one) <input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected: 32 7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

Designation of Public Housing Activity Description
1a. Development name: Saltonstall Building 1b. Development (project) number: 015-002
2. Designation type: Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA's Designation Plan <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <u>(12/01/01)</u>
5. If approved, will this designation constitute a (select one) <input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected: 199 7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" 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: _____)
<input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: _____)
<input type="checkbox"/> Requirements no longer applicable: vacancy rates are less than 10 percent
<input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units
<input type="checkbox"/> Other: (describe below)

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

[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)
Family Self-Sufficiency Program	25	Application and Interview	PHA Main Office	Section 8 Program

(2) Family Self Sufficiency program/s

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants	Actual Number of Participants

	(start of FY 2001 Estimate)	(As of: 09/30/2001)
Public Housing		
Section 8	25	12

- 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:

The FSS Coordinator for the Medford Housing Authority resigned in this Fiscal Year. We have recently hired a new coordinator. Because several people have achieved their goals, we believe that the program has been successful, and we are confident that our newly hired FSS Coordinator is enthusiastic about outreach and success for the population that this program serves. The Medford Housing Authority intends to monitor this program more closely.

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)

015-001 (Willis Avenue Family Development)

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)

015-001 (Willis Avenue Family Development)

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)

015-001 (Willis Avenue Family Development)

D. Additional information as required by PHDEP/PHDEP Plan

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

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

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

X Please See Attachment

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

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

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

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

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

Exemptions from component 17: Section 8 Only PHAs are not required to complete this component. High performing and small PHAs are not required to complete this component.

1. Yes No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock, including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have **not** been addressed elsewhere in this PHA Plan?
2. What types of asset management activities will the PHA undertake? (select all that apply)
 - Not applicable
 - Private management
 - Development-based accounting
 - Comprehensive stock assessment
 - Other: (list below)
3. Yes No: Has the PHA included descriptions of asset management activities in the **optional** Public Housing Asset Management Table?

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

1. Yes No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
- Attached at Attachment (File name)
- Provided below:

Comments on Plan by Public

The Authority received only one additional comment on the Plan. This comment was made by a resident who is also a member of the Resident Advisory Board. The comment related to the requirements of the new federal model lease which the Authority has adopted and the Grievance Procedure for federal developments. The comment relative to the Grievance Procedure and that the resident should know in advance of the hearing the name of the Hearing Officer. This comment was discussed with resident representatives, and has been accepted by the Authority.

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:

Addition to Federal Grievance Procedure

The Grievant shall be sent a list of all grievance hearing officers and may request that any hearing officer who has a conflict of interest not be selected to conduct the hearing. It shall be the grievant's obligation to substantiate the reason for said request.

- 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: (provide name here)
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)

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

D. Other Information Required by HUD

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

See ATTACHMENT A for definition of Substantial Deviation and significant Amendment or Modification.

Attachments

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

(1) Flat Rents

The Medford Housing Authority has adopted monthly flat rents as follows:

1 Bedroom	=	\$850.00
2 Bedroom	=	\$975.00
3 Bedroom	=	\$1,100.00
4 Bedroom	=	\$1,300.00

(2) Definition of Substantial Deviation and Significant Amendment or Modification
(Component 18 Part D)

The Medford Housing Authority hereby defines substantial deviation and significant amendment or modification as any change in policy which significantly and substantially alters the Authority's stated mission and the persons the Authority serves. This would include admissions preferences, demolition or disposition activities, and homeownership or conversion programs. Discretionary or administrative amendments consonant with the Authority's stated overall mission and basic objectives will not be considered substantial deviations or significant modifications.

**CAPITAL FUND PROGRAM TABLES
ATTACHEMENT NO. MA015A02**

CAPITAL FUND PROGRAM TABLES START HERE

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: MEDFORD HOUSING AUTHORITY			Grant Type and Number		Federal FY of Grant:
			Capital Fund Program Grant No:CFP		2001
			Replacement Housing Factor Grant No:		
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements	40,000.			
4	1410 Administration	90,600.			
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement	41,000.			
10	1460 Dwelling Structures	735,000.			
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	40,000.			
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				

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

PHA Name: MEDFORD HOUSING AUTHORITY	Grant Type and Number Capital Fund Program Grant No:CFP 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
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency	56,746			
21	Amount of Annual Grant: (sum of lines 2 – 20)	1,003,364.			
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	276,000.			
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures	465,000.			

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

PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program Grant No: CFP Replacement Housing Factor Grant No:			Federal FY of Grant: 2001			
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	
15-1 Willis	heat: mod-phase I	1460	28	140,000.				
15-2 Saltonstall	Lobby entry mod	1460	200	200,000.				
	Heat mod, phase II	1460	200	325,000.				
	VCT Replacement	1460	10	10,000.				
	Lighting/Landscape	1450	200	31,000.				
15-4 Fellsway	Entry Doors	1460	15	15,000.				
Fellsway	Int. Security lighting	1460	15	10,000.				
Fellsway	Utility/mechanical infrastructure	1460	15	15,000.				
Canal	Electronic entry	1460	17	10,000.				
15-6 Tempone	Ext. Security Lighting	1450	100	10,000.				
	Utility/mechanical infrastructure	1460	100	10,000.				
PHA WIDE	Mod consultant	1408	481	40,000.				
	Truck w/plow	1475	481	40,000				
	Administration	1410	481	90,600				
	Contingency	1502	481	56,764				

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

PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program No: CFP Replacement Housing Factor No:					Federal FY of Grant: 2001
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	
15-1 Willis	9/30/03			9/30/04			
5-2 Saltonstall	9/30/03			9/30/04			
15-4 Fellsway/Canal	9/30/03			9/30/04			
15-6 Tempone	9/30/03			9/30/04			
PHA WIDE	9/30/03			9/30/04			

Capital Fund Program Five-Year Action Plan

Part I: Summary

PHA Name Medford Housing Authority		<input type="checkbox"/> Original 5-Year Plan <input checked="" type="checkbox"/> Revision No: 1			
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2002 PHA FY: 2002	Work Statement for Year 3 FFY Grant: 2003 PHA FY: 2003	Work Statement for Year 4 FFY Grant: 2004 PHA FY: 2004	Work Statement for Year 5 FFY Grant: 2005 PHA FY: 2005
	Annual Statement				
15-1 Willis		200,000.	225,000.	150,000.	200,000.
15-2 Saltonstall		396,000.	401,000.	456,000.	350,000.
15-4 Fellsway/Canal		70,000.	60,000.	50,000.	95,000.
15-6 Tempone		65,000.	55,000.	100,000.	100,000.
MHA WIDE		272,364.	262,364	247,364	258,364
CFP Funds Listed for 5-year planning		1,003,364	1,003,364	1,003,364	1,003,364
Replacement Housing Factor Funds					

Tables MA06P01550100

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary					
PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P01550100 Replacement Housing Factor Grant No:			Federal FY of Grant: 2000
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 1) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 3/31/2001 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements Soft Costs	40,000.00	40,000.00	.00	.00
	Management Improvements Hard Costs				
4	1410 Administration	60,000.00	60,000.00		
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	80,000.00	80,000.00	10,764.00	10,764.00
8	1440 Site Acquisition				
9	1450 Site Improvement		3,560.00	3,560.00	3,560.00
10	1460 Dwelling Structures	790,000.00	790,000.00	225,000.00	55,558.75
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	1502 Contingency	11,129.00	7,569.00		

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name: Medford Housing Authority	Grant Type and Number Capital Fund Program Grant No: MA06P01550100 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: 3/31/2001
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
	Amount of Annual Grant: (sum of lines 2 - 18)	981,129.00	981,129.00	239,324.00	69,882.75
	Amount of line XX Related to LBP Activities				
	Amount of line XX Related to Section 504 compliance				
	Amount of line XX Related to Security –Soft Costs	102,000.00	10,000.00	3,960.00	3,960.00
	Amount of Line XX related to Security-- Hard Costs				
	Amount of line XX Related to Energy Conservation Measures	84,000.00	600,000.00	6,804.00	6,804.00
	Collateralization Expenses or Debt Service				

Annual Statement/Performance and Evaluation Report									
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)									
Part II: Supporting Pages									
PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P01550100 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
Willis Avenue:									
15-1	Replace Heat System		1460		320,000.00	310,000.00			
15-1			1430			10,000.00	6,615.00	6,615.00	Design Stage
15-1	Landscaping		1450			10,000.00	3,560.00	3,560.00	Completed
Saltonstall Bldg:									
15-2	Electric Heat Convert – Phase 1		1460		300,000.00	200,000.00			
15-2			1430		80,000.00	80,000.00	189.00	189.00	A&E Selection
15-2	Lobby Phase II		1460		100,000.00	100,000.00	100,000.00	55,558.75	In Const.
Tempone Manor:									
15-6	Replace E-Gen		1460		45,000.00	35,000.00			
15-6	Kitchen Mod Phase II		1460		125,000.00	125,000.00	125,000.00		In Const.
15-6	Sprinkler		1430		10,000.00	10,000.00	3,960.00	3,960.00	Design Stage
PHA Wide:									
	Mod Consultant		1408		40,000.00	40,000.00			
	Administration		1410		60,000.00	60,000.00			
	Contingency		1502		11,129.00	11,129.00			
							239,324.00		

Tables MA06P01570699

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary					
PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P01570699 Replacement Housing Factor Grant No:			Federal FY of Grant: 1999
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 3/31/2001 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements Soft Costs	115,000.00		115,000.00	30,518.97
	Management Improvements Hard Costs				
4	1410 Administration	90,600.00		90,600.00	18,426.86
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	54,000.00	55,276.18	55,276.18	55,276.18
8	1440 Site Acquisition				
9	1450 Site Improvement	92,000.00		92,000.00	22,877.50
10	1460 Dwelling Structures	526,000.00	592,662.82	592,662.82	573,919.39
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures	65,000.00		65,000.00	34,404.76
13	1475 Nondwelling Equipment	25,000.00		25,000.00	259.95
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1502 Contingency	68,913.00	.00		

Annual Statement/Performance and Evaluation Report						
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary						
PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P01570699 Replacement Housing Factor Grant No:			Federal FY of Grant: 1999	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no:)						
<input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 3/31/2001 <input type="checkbox"/> Final Performance and Evaluation Report						
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost		
	Amount of Annual Grant: (sum of lines 2 - 18)	1,036,519.00	1,036,519.00	1,036,519.00	736,133.61	
	Amount of line XX Related to LBP Activities					
	Amount of line XX Related to Section 504 compliance					
	Amount of line XX Related to Security –Soft Costs	102,000.00			4,410.00	
	Amount of Line XX related to Security-- Hard Costs				2,950.00	
	Amount of line 19 Related to Energy Conservation Measures	84,000.00				
	Collateralization Expenses or Debt Service					

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

PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P01570699 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
Willis Avenue:									
15-1	Landscaping		1450		30,000.00	14,612.50	14,612.50	14,612.50	Completed
15-1	Video Security		1460		25,000.00	61,981.44	61,981.44	61,981.44	Completed
15-1	VS-A&E		1430		5,000.00	4,410.00	4,410.00	4,410.00	Completed
Saltonstall Bldg:									
15-2	Pergola		1470		65,000.00	41,254.76	41,254.76	41,254.76	Completed
15-2	Landscape		1450		35,000.00	4,623.00	4,623.00	4,623.00	Completed
15-2	Fire Alarm/Cent.Monitor		1460		81,000.00	230,000.00	230,000.00	117,435.10	In Const.
15-2	Fire A&E		1430		10,000.00			1,070.67	In Const.
15-2	Lobby Mod		1460		145,000.00	326,232.47	326,232.47	102,266.29	Under Const.
15-2	Lobby A&E		1430		15,000.00	20,078.31	20,078.31	20,078.31	In Const.
15-2	Portre-C A&E		1430			1,215.66	1,215.66	1,215.66	Completed
15-2	Kitchen A&E		1430			2,642.09	2,642.09	2,642.09	Completed
15-2	C/A Floor		1460			206,903.71	206,903.71	206,903.71	Punch List
Canal Street:									
15-4	Replace Water Heater		1460		5,000.00	.00			To FY 01
15-4	Cent. Energy Monitor		1460		6,500.00	2,950.00	2,950.00	2,950.00	Completed
15-4	Landscape		1450			2,202.00	2,202.00	2,202.00	Completed
Fellsway									
15-4	Replace Heat		1460		40,000.00	.00			To FY 01
15-4	Cent Energy Monitor		1460		6,500.00	.00			To FY 01
15-4	Cem A&E		1430		8,000.00	.00			To FY 01
Tempone:									

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

PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P01570699 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
15-6	Kit Mod Phase II		1460		190,000.00	57,197.80	57,197.80	57,197.80	To Phase II
15-6	Kit A&E		1430						
15-6	Replace Fence		1450		27,000.00	1,440.00	1,440.00	1,440.00	Completed
15-6	Community Hall Floor		1460		27,000.00	.00			To FY 01
15-6	Sprinkler Mod A&E		1430		16,000.00	88.45	88.45	88.45	To FY 01
15-6	Ceiling Fans		1460			.00	.00	.00	To FY 97
PHA WIDE									
	Mod Consultant		1408		40,000.00	40,000.00	40,000.00	30,518.97	On Going
	Expand Community Police		1408		75,000.00	.00			To PHDEP
	Litter Vac		1475		25,000.00	259.95	259.95	259.95	Completed
	Administration		1410		90,600.00	18,426.86	18,426.86	18,426.86	
	Contingency		1502		67,796.00				
					1,036,579.00	1,036,579.00	1,036,579.00	736,133.61	

MA06P01570698

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary					
PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P01570698 Replacement Housing Factor Grant No:			Federal FY of Grant: 1998
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 1)					
<input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements Soft Costs				
	Management Improvements Hard Costs	30,000.00	58,965.91	58,965.91	58,965.91
4	1410 Administration	80,000.00	46,395.90	46,395.90	46,395.90
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	18,425.00	18,723.70	18,723.70	9,587.37
8	1440 Site Acquisition				
9	1450 Site Improvement	75,000.00	45,081.50	45,081.50	45,081.50
10	1460 Dwelling Structures	573,500.00	664,222.46	664,222.46	195,125.78
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures	50,000.00	.00		
13	1475 Nondwelling Equipment		43,716.53	43,716.53	43,716.53
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1502 Contingency	50,181.00	.00		

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary					
PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P01570698 Replacement Housing Factor Grant No:			Federal FY of Grant: 1998
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 1)					
<input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
	Amount of Annual Grant: (sum of lines 2 - 18)	877,106.00	877,106.00	877,106.00	398,872.99
	Amount of line XX Related to LBP Activities				
	Amount of line XX Related to Section 504 compliance				
	Amount of line XX Related to Security –Soft Costs				
	Amount of Line XX related to Security-- Hard Costs	.00	285,444.20	285,444.20	169,997.37
	Amount of line 19 Related to Energy Conservation Measures				
	Collateralization Expenses or Debt Service				

Annual Statement/Performance and Evaluation Report									
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)									
Part II: Supporting Pages									
PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P01570698 Replacement Housing Factor Grant No:				Federal FY of Grant: 1998			
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
Willis Avenue:									
15-1	Video Security/ems		1460		20,000.00	103,634.76	103,634.76	103,364.76	Completed
15-1			1430			4,635.07	4,635.07	4,635.07	Completed
15-1	Landscape		1450		3,000.00	2,970.00	2,970.00	2,970.00	Completed
15-1	Floors		1760		2,000.00	1,475.00	1,475.00	1,475.00	Completed
15-2	Landscape		1450		35,000.00	4,623.00	4,623.00	4,623.00	Completed
Saltonstall Bldg:									
15-2	Pergola		1430			7,304.80	7,304.80	2,782.30	On going
15-2	Pergola		1450		65,000.00	32,154.00	32,154.00	32,154.00	On going
15-2	Porte/Entry		1430			825.00	825.00	825.00	On going
15-2	Porte/Entry		1460		160,000.00	97,697.29	27,697.29	1,581.00	On going
15-2	C/A Flooring		1460		125,000.00	187,729.71	187,729.71	500.00	On going
15-2	Roof		1460		40,000.00	33,250.00	33,250.00	33,250.00	Comp. Phs II.
15-2	C/A Floor		1460			206,903.71	206,903.71	206,903.71	Punch List
15-2	Fire Alarm		1430			1,070.67	1,070.67	420.00	On going
15-2	Fire Alarm		1460		137,000.00	168,926.70	168,926.70		Undr Contract
15-2	Kitchen		1460		125,000.00	35,126.00	35,126.00	35,126.00	Phase II
15-2	Lobby/Entry		1430			1,635.66	1,635.66		Undr Contract
15-2	Lobby/Entry		1460		16,000.00	500.00	500.00		Undr Contract
15-2	Site Lighting		1450		3,000.00	2,675.00	2,675.00	2,675.00	Completed
15-2	Ceiling Fans		1460				15,399.00	15,399.00	Completed
15-2	Roof Fells		1460				2,850.00	2,850.00	A&E
Tempone Manor:									

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

PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P01570698 Replacement Housing Factor Grant No:				Federal FY of Grant: 1998			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories		Dev. Acct No.	Quant ity	Total Estimated Cost		Total Actual Cost		Status of Work
15-6	Ceiling Fans		1460	100	35,000.00	17,634.00	17,634.00	1,310.00	On going
15-6	Landscaping		1450		10,000.00	7,282.50	7,282.50	7,282.50	Completed
15-6	Windows		1430				925.00	925.00	A&E
PHA Wide:									
.	MGMT Improve.		1408		30,000.00	58,965.91	58,965.91	98,965.91	
	Admin.		1410		80,000.00	46,395.90	46,395.90	46,395.90	
	Bobcat		1475	1	15,000.00	16,553.00	16,553.00	16,553.00	Completed
	Litter Vac		1475	1	25,000.00	27,163.53	27,163.53	27,163.53	Completed
							877,106.00	398,872.99	

MA06P01570597

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary					
PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P01570597 Replacement Housing Factor Grant No:			Federal FY of Grant: 1997
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 2) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input checked="" type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements Soft Costs				
	Management Improvements Hard Costs	30,000.00	15,402.87	15,402.87	15,402.87
4	1410 Administration	62,300.00	16,712.51	61,712.51	16,712.51
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	43,000.00	25,295.97	25,295.97	25,295.97
8	1440 Site Acquisition				
9	1450 Site Improvement	13,500.00	54,082.99	54,082.99	54,082.99
10	1460 Dwelling Structures	657,078.00	731,173.66	731,173.66	731,173.66
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	35,000.00	42,608.00	42,608.00	42,608.00
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1502 Contingency	44,398.00	.00	.00	.00

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary					
PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P01570597 Replacement Housing Factor Grant No:			Federal FY of Grant: 1997
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 2)					
<input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input checked="" type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
	Amount of Annual Grant: (sum of lines 2 - 18)	885,276.00	885,276.00	885,276.00	885,276.00
	Amount of line XX Related to LBP Activities				
	Amount of line XX Related to Section 504 compliance	50,000.00	50,000.00	50,000.00	50,000.00
	Amount of line XX Related to Security –Soft Costs	.00	11,170.17	11,170.17	11,170.17
	Amount of Line XX related to Security-- Hard Costs	.00	80,149.92	80,149.92	80,149.92
	Amount of line 19 Related to Energy Conservation Measures				
	Collateralization Expenses or Debt Service				

Annual Statement/Performance and Evaluation Report									
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)									
Part II: Supporting Pages									
PHA Name: Medford Housing Authority			Grant Type and Number Capital Fund Program Grant No: MA06P01570597 Replacement Housing Factor Grant No:				Federal FY of Grant: 1997		
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
Willis Ave:									
15-1	Bath Doors		1460		131,677.91	131,677.91	131,677.91	131,677.91	Completed
15-1	A/E		1430		4,388.10	4,388.10	4,388.10	4,388.10	Completed
15-1	Floors		1460		3,875.00	3,875.00	3,875.00	3,875.00	Completed
15-2	Landscape		1450		9,174.99	9,174.99	9,174.99	9,174.99	Completed
Saltonstall Bldg:									
15-2	Kitchen Mod.		1460		378,085.59	378,095.59	378,085.59	378,085.59	Completed
15-2	A/E		1430		4,625.00	4,625.00	4,625.00	4,625.00	Completed
15-2	Roof		1460		80,149.92	80,149.92	80,149.92	80,149.92	Completed
15-2	A/E		1430		6,837.70	6,837.70	6,837.70	6,837.70	Completed
15-2	Alarm A/E		1430		7,050.18	7,050.18	7,050.18	7,050.18	Completed
15-2	Entry Porte		1460		87,214.00	87,214.00	87,214.00	87,214.00	Completed
15-2	Pergola		1460		42,166.24	42,166.24	42,166.24	42,166.24	Completed
15-2	Landscape		1450		1,540.00	1,540.00	1,540.00	1,540.00	Completed
Canal Street									
15-4	Doors		1460		3,325.00	3,235.00	3,325.00	3,325.00	Completed
Tempone									
15-6	Alarm		1430		894.99	894.99	894.99	894.99	Completed
15-6	Landscape		1450		43,368.00	43,368.00	43,368.00	43,368.00	Completed
15-6	A/C		1460		4,680.00	4,680.00	4,680.00	4,680.00	Completed
PHA WIDE									
	Mgmt Improv		1408			15,402.87	15,402.87	15,402.87	Completed
	Administration		1410			16,712.51	16,712.51	16,712.51	Completed

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

PHA Name: Medford Housing Authority		Grant Type and Number Capital Fund Program Grant No: MA06P01570597 Replacement Housing Factor Grant No:				Federal FY of Grant: 1997			
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
	Budget Truck		1475			42,608.00	42,608.00	42,608.00	Completed
					885,276.00	885,276.00	885,276.00	885,276.00	

**PUBLIC HOUSING DRUG ELIMINATION PROGRAM PLAN
ATTACHMENT NO. MA015B01**

Public Housing Drug Elimination Program Plan

Note: THIS PHDEP Plan template (HUD 50075-PHDEP Plan) is to be completed in accordance with Instructions located in applicable PIH Notices.

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 **\$118,178**
- B. Eligibility type (Indicate with an “x”) N1 _____ N2 _____ R **X** _____
- C. FFY in which funding is requested **2002**
- D. Executive Summary of Annual PHDEP Plan

In the space below, provide a brief overview of the PHDEP Plan, including highlights of major initiatives or activities undertaken. It may include a description of the expected outcomes. The summary must not be more than five (5) sentences long

Full-time Community Police Officer with salary to be paid by PHDEP grant and benefits to be paid by Medford Police Department. Youth activities will include Malden YMCA coordinated after school activities and computer learning center. Drug prevention workshops and domestic violence seminars will also be provided, as well as drug treatment referrals.

E. Target Areas

Complete the following table by indicating each PHDEP Target Area (development or site where activities will be conducted), the total number of units in each PHDEP Target Area, and the total number of individuals expected to participate in PHDEP sponsored activities in each Target Area.

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)
Willis Avenue Family Development	150	450-500

F. Duration of Program

Indicate the duration (number of months funds will be required) of the PHDEP Program proposed under this Plan (place an “x” to indicate the length of program by # of months. For “Other”, identify the # of months).

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

G. PHDEP Program History

Indicate each FY that funding has been received under the PHDEP Program (place an “x” by each applicable Year) and provide amount of funding received. If previously funded programs have not been closed out at the time of this submission, indicate the fund balance and anticipated completion date. For grant extensions received, place “GE” in column or “W” for waivers.

Fiscal Year of Funding	PHDEP Funding Received	Grant #	Fund Balance as of Date of this Submission	Grant Extensions or Waivers	Anticipated Completion Date
FY 1995	240,500	MA06DEP0150195	0		
FY 1996					
FY 1997	144,300	MA06DEP015197	0		
FY1998					
FY 1999	105,791	MA06DEP0150199	3,948.31		2001
FY 2000	110,256	MA06DEP0150100	110,256		2002
FY 2001	118,178	MA06DEP0150101	118,176		2003

Section 2: PHDEP Plan Goals and Budget

A. PHDEP Plan Summary

In the space below, summarize the PHDEP strategy to address the needs of the target population/target area(s). Your summary should briefly identify: the broad goals and objectives, the role of plan partners, and your system or process for monitoring and evaluating PHDEP-funded activities. This summary should not exceed 5-10 sentences.

The Medford Housing Authority in conjunction with the Medford Police Department will provide a full-time community police officer at the development who will interact with residents to coordinate enforcement efforts, to gather information, to promote community support for drug prevention activities, and to help improve the safety and quality of life in the development. Youth activities will be coordinated at the development’s community center through the Malden YMCA, which activities will range from computer learning activities with emphasis on prevention of substance abuse, violence, and crime. Drug treatment referrals and referrals to other agencies will be made as needed, and workshops and seminars will be conducted on safety and security, drug prevention and domestic violence. Undercover police surveillance and security cameras will also be utilized to assist in these efforts.

B. PHDEP Budget Summary

Enter the total amount of PHDEP funding allocated to each line item.

FY 00 PHDEP Budget Summary	
Budget Line Item	Total Funding
9110 - Reimbursement of Law Enforcement	47,2700
9120 - Security Personnel	
9130 - Employment of Investigators	20,922
9140 - Voluntary Tenant Patrol	
9150 - Physical Improvements	
9160 - Drug Prevention	47,056
9170 - Drug Intervention	6,000
9180 - Drug Treatment	1,500
9190 - Other Program Costs	
TOTAL PHDEP FUNDING	118,265

PHDEP Plan Goals and Activities

In the tables below, provide information on the PHDEP strategy summarized above by budget line item. Each goal and objective should be numbered sequentially for each budget line item (where applicable). Use as many rows as necessary to list proposed activities (additional rows may be inserted in the tables). PHAs are not required to provide information in shaded boxes. Information provided must be concise—not to exceed two sentences in any column. Tables for line items in which the PHA has no planned goals or activities may be deleted.

9110 - Reimbursement of Law Enforcement					Total PHDEP Funding: \$42,700		
Goal(s)	Full-time Community Police Officer assigned to Development						
Objectives	Interact with Residents						
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount/Source)	Performance Indicators
1. Community Police Officer			1/02	12/02	42,700	14,300 ⁽¹⁾	
2.							
3.							

(1) Employee Fringe Benefits funded by Medford Police Department

9120 - Security Personnel N/A					Total PHDEP Funding: \$ 0		
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: \$20,922		
Goal(s)	Police Undercover Surveillance						
Objectives	Identify and arrest drug dealers						
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount/Source)	Performance Indicators
1. Part-time Investigator			1/02	12/02	20,922	8,000	
2.							

3.							
----	--	--	--	--	--	--	--

9140 - Voluntary Tenant Patrol N/A					Total PHDEP Funding: \$ 0		
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.							

9150 - Physical Improvements N/A					Total PHDEP Funding: \$ 0		
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: \$47,056		
Goal(s)							
Educate residents as to risks and disadvantages of drug use.							
Objectives							
Provide activities preventing drug abuse.							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount /Source)	Performance Indicators
1.Malden YMCA	100	500	1/02	12/02	30,000		
2.Computer Instruction	100	500			10,000		
3.Computer Equipment	100	500			6,000		
4.Activities Equipment	100	500			1,056		

9170 - Drug Intervention					Total PHDEP Funding: \$6,000		
Goal(s)							
Coordinate all Program Activities							
Objectives							
Facilitate and monitor programs and expenditures							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount /Source)	Performance Indicators

1.MHA Coordinator	500	500	1/02	12/02	6,000	2,400 (2)	
2.							
3.							

(2) Employee Fringe Benefits funded by Medford Housing Authority

9180 - Drug Treatment					Total PHDEP Funding: \$1,500		
Goal(s)	Provide treatment and professional services to drug users						
Objectives	To treat and rehabilitate drug users						
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHDEP Funding	Other Funding (Amount /Source)	Performance Indicators
1.Clinical and Counseling Services	10	500	1/02	12/02	1,500		
2.							
3.							

9190 - Other Program Costs					Total PHDEP Funds: \$		
Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHDEP Funding	Other Funding (Amount /Source)	Performance Indicators
1.							
2.							
3.							

Section 3: Expenditure/Obligation Milestones

Indicate by Budget Line Item and the Proposed Activity (based on the information contained in Section 2 PHDEP Plan Budget and Goals), the % of funds that will be expended (at least 25% of the total grant award) and obligated (at least 50% of the total grant award) within 12 months of grant execution.

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	Activity 1	11,000	Activity 1	22,000
9120				
9130	Activity 1	6,000	Activity 1	12,000
9140				
9150				
9160	Activity 1, 2, 3, 4	12,000	Activity 1,2,3,4	25,000
9170	Activity 1	2,000	Activity 1	4,000

9180	Activity 1	500	Activity 1	1,000
9190				
TOTAL		\$31,500		\$64,000

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.”

**PUBLIC HOUSING DRUG ELIMINATION PROGRAM PLAN
ATTACHMENT NO. MA015B01**

Public Housing Drug Elimination Program Plan

Note: THIS PHDEP Plan template (HUD 50075-PHDEP Plan) is to be completed in accordance with Instructions located in applicable PIH Notices.

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 **\$118,178**
- B. Eligibility type (Indicate with an “x”) N1 _____ N2 _____ R **X** _____
- C. FFY in which funding is requested **2002**
- D. Executive Summary of Annual PHDEP Plan

In the space below, provide a brief overview of the PHDEP Plan, including highlights of major initiatives or activities undertaken. It may include a description of the expected outcomes. The summary must not be more than five (5) sentences long

Full-time Community Police Officer with salary to be paid by PHDEP grant and benefits to be paid by Medford Police Department. Youth activities will include Malden YMCA coordinated after school activities and computer learning center. Drug prevention workshops and domestic violence seminars will also be provided, as well as drug treatment referrals.

E. Target Areas

Complete the following table by indicating each PHDEP Target Area (development or site where activities will be conducted), the total number of units in each PHDEP Target Area, and the total number of individuals expected to participate in PHDEP sponsored activities in each Target Area.

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)
Willis Avenue Family Development	150	450-500

F. Duration of Program

Indicate the duration (number of months funds will be required) of the PHDEP Program proposed under this Plan (place an “x” to indicate the length of program by # of months. For “Other”, identify the # of months).

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

G. PHDEP Program History

Indicate each FY that funding has been received under the PHDEP Program (place an “x” by each applicable Year) and provide amount of funding received. If previously funded programs have not been closed out at the time of this submission, indicate the fund balance and anticipated completion date. For grant extensions received, place “GE” in column or “W” for waivers.

Fiscal Year of Funding	PHDEP Funding Received	Grant #	Fund Balance as of Date of this Submission	Grant Extensions or Waivers	Anticipated Completion Date
FY 1995	240,500	MA06DEP0150195	0		
FY 1996					
FY 1997	144,300	MA06DEP015197	0		
FY1998					
FY 1999	105,791	MA06DEP0150199	3,948.31		2001
FY 2000	110,256	MA06DEP0150100	110,256		2002
FY 2001	118,178	MA06DEP0150101	118,176		2003

Section 2: PHDEP Plan Goals and Budget

A. PHDEP Plan Summary

In the space below, summarize the PHDEP strategy to address the needs of the target population/target area(s). Your summary should briefly identify: the broad goals and objectives, the role of plan partners, and your system or process for monitoring and evaluating PHDEP-funded activities. This summary should not exceed 5-10 sentences.

The Medford Housing Authority in conjunction with the Medford Police Department will provide a full-time community police officer at the development who will interact with residents to coordinate enforcement efforts, to gather information, to promote community support for drug prevention activities, and to help improve the safety and quality of life in the development. Youth activities will be coordinated at the development’s community center through the Malden YMCA, which activities will range from computer learning activities with emphasis on prevention of substance abuse, violence, and crime. Drug treatment referrals and referrals to other agencies will be made as needed, and workshops and seminars will be conducted on safety and security, drug prevention and domestic violence. Undercover police surveillance and security cameras will also be utilized to assist in these efforts.

B. PHDEP Budget Summary

Enter the total amount of PHDEP funding allocated to each line item.

FY 00 PHDEP Budget Summary	
Budget Line Item	Total Funding
9110 - Reimbursement of Law Enforcement	47,2700
9120 - Security Personnel	
9130 - Employment of Investigators	20,922
9140 - Voluntary Tenant Patrol	
9150 - Physical Improvements	
9160 - Drug Prevention	47,056
9170 - Drug Intervention	6,000
9180 - Drug Treatment	1,500
9190 - Other Program Costs	
TOTAL PHDEP FUNDING	118,265

PHDEP Plan Goals and Activities

In the tables below, provide information on the PHDEP strategy summarized above by budget line item. Each goal and objective should be numbered sequentially for each budget line item (where applicable). Use as many rows as necessary to list proposed activities (additional rows may be inserted in the tables). PHAs are not required to provide information in shaded boxes. Information provided must be concise—not to exceed two sentences in any column. Tables for line items in which the PHA has no planned goals or activities may be deleted.

9110 - Reimbursement of Law Enforcement					Total PHDEP Funding: \$42,700		
Goal(s)	Full-time Community Police Officer assigned to Development						
Objectives	Interact with Residents						
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount/Source)	Performance Indicators
1. Community Police Officer			1/02	12/02	42,700	14,300 ⁽¹⁾	
2.							
3.							

(1) Employee Fringe Benefits funded by Medford Police Department

9120 - Security Personnel N/A					Total PHDEP Funding: \$ 0		
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: \$20,922		
Goal(s)	Police Undercover Surveillance						
Objectives	Identify and arrest drug dealers						
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount/Source)	Performance Indicators
1. Part-time Investigator			1/02	12/02	20,922	8,000	
2.							

3.							
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9140 - Voluntary Tenant Patrol N/A					Total PHDEP Funding: \$ 0		
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.							

9150 - Physical Improvements N/A					Total PHDEP Funding: \$ 0		
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: \$47,056		
Goal(s)							
Educate residents as to risks and disadvantages of drug use.							
Objectives							
Provide activities preventing drug abuse.							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount /Source)	Performance Indicators
1.Malden YMCA	100	500	1/02	12/02	30,000		
2.Computer Instruction	100	500			10,000		
3.Computer Equipment	100	500			6,000		
4.Activities Equipment	100	500			1,056		

9170 - Drug Intervention					Total PHDEP Funding: \$6,000		
Goal(s)							
Coordinate all Program Activities							
Objectives							
Facilitate and monitor programs and expenditures							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount /Source)	Performance Indicators

1.MHA Coordinator	500	500	1/02	12/02	6,000	2,400 (2)	
2.							
3.							

(2) Employee Fringe Benefits funded by Medford Housing Authority

9180 - Drug Treatment					Total PHDEP Funding: \$1,500		
Goal(s)	Provide treatment and professional services to drug users						
Objectives	To treat and rehabilitate drug users						
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount /Source)	Performance Indicators
1.Clinical and Counseling Services	10	500	1/02	12/02	1,500		
2.							
3.							

9190 - Other Program Costs					Total PHDEP Funds: \$		
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.							

Section 3: Expenditure/Obligation Milestones

Indicate by Budget Line Item and the Proposed Activity (based on the information contained in Section 2 PHDEP Plan Budget and Goals), the % of funds that will be expended (at least 25% of the total grant award) and obligated (at least 50% of the total grant award) within 12 months of grant execution.

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	Activity 1	11,000	Activity 1	22,000
9120				
9130	Activity 1	6,000	Activity 1	12,000
9140				
9150				
9160	Activity 1, 2, 3, 4	12,000	Activity 1,2,3,4	25,000
9170	Activity 1	2,000	Activity 1	4,000

9180	Activity 1	500	Activity 1	1,000
9190				
TOTAL		\$31,500		\$64,000

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.”

**MEDFORD HOUSING AUTHORITY
PET POLICY
ATTACHMENT NO. MA015C01**

MEDFORD HOUSING AUTHORITY PET POLICY

The following regulations governing animals on MHA property (Federal) have been developed in compliance with the Quality Housing and Work Responsibility Act of 1998. Also considered, are the safe and humane treatment of pets and the quality of life issues of MHA residents and neighbors.

Residents of the MHA who wish to keep common household pets must notify the Authority in writing. An MHA Pet Policy Agreement must be signed by the Resident and approved by the Authority before animals are allowed on Housing Authority property.

Each Resident Pet Owner must provide the name, address, and phone number of the veterinarian responsible for the pet's health care, along with a photo of the pet, pet license, rabies tag, and proof of spaying or neutering. A pet must be at least six months of age with all stated requirements satisfied before the pet is approved/allowed on MHA Property. A personal liability insurance policy is strongly recommended by the MHA for all pet owners.

A pet security deposit of \$160.00 or one months rent (whichever amount is less) is required from each Resident Pet Owner to be kept in an escrow account for damage caused by a pet. An unused portion will be refunded plus the accrued interest. A non-refundable fee for operating cost of \$50.00 will be charged to the Resident Pet Owner's account each year.

Resident Pet Owner's responsibilities include but are not limited to:

- Maintaining his/her pet responsibility and in accordance with applicable state and local public health, animal control and animal anti-cruelty laws and regulation and in accordance with the MHA pet policy.
- Providing adequate care for the pet at all times.
- Registering his/her pet with the Authority along with an identifying description of the animal and the adult household member who will be primarily responsible for the animals' care.
- Assuring his/her pet is at least six months old and does not exceed eighteen (18) pounds by adulthood. Cats are exempt from this requirement.
- Immediately cleaning up the animal feces of his/her pet inside the apartment or on any other MHA property.

- Keeping pets restrained on a leash at all times when outside of the housing unit and on MHA property. Pets are not to be leashed or tied to any MHA fences, buildings, railings, clotheslines poles, or the like. A pet leash is not to exceed five (5) feet in length.
- Assuring his/her pet does not annoy other tenants or neighbors by excessive barking or other noise.
- Keeping his/her pet free of pests, such as ticks or fleas. A Resident Pet Owner will be responsible for any extermination required as a result of his/her pet.
- Assuring his/her pet is not left unattended outside of an apartment on MHA property at any time. Pets are not to be left unattended in an apartment for more than a twelve-hour period.
- Providing the name of the household member who can and will return home if the animal experiences distress or causes a disturbance when left alone. The Resident Pet Owner is responsible for providing adequate care of the pet at all times.
- Reporting all animal bites to the Authority Office and Police Department immediately.
- The regular removal and replacement of litter used in litter boxes or in portable animal enclosures within the dwelling unit so as to comply with all health requirements.

Common household pets do not include:

- Animals who would be allowed to produce offspring for sale.
- Wild animals, feral animals, and any other animals who are unamendable to routine human handling or who pose a threat to children and the elderly, such as ferrets, foxes, skunks, squirrels, coyotes and groundhogs. These animals are not to be fed or welcomed on MHA property.
- Reptiles, such as snakes, turtles, lizards, and iguanas who pose a significant risk of salmonella to those who handle them.
- Animals of species commonly used or found on farms, such as ducks, baby chicks, chickens, or potbellied pigs.
- Non-human primates, such as monkeys.

- Pigeons, doves, mynah birds, psittacoses birds, and birds of other species that are host to the organisms causing psittacosis in humans. Pigeons, doves. Seagulls are not being fed on MHA property.
- Vicious animals as defined by city ordinance, state law, and/or insurance providers.
- Dogs such as Pit Bulls/Staffordshire Terriers, Rottweiler, Chow, Boxer breeds, German Shepherd, and Doberman Pinscher, and/or dogs of similar temperament. There are not allowed on MHA property.

The responsibility of Management in dealing with quality-of-life issues for public housing residents include but are not limited to:

- Protecting the health, safety, and quiet enjoyment of public housing residents in a relatively dense housing environment where a companion animal may be allowed.
- Informing a Resident Pet Owner, in writing, of any allegations of violations of the MHA Pet Policy.
- Prohibiting the keeping of any animal on MHA property by any resident who is charged with or has been convicted of cruelty to an animal.
- The strict enforcement of the MHA Pet Policy up to and including the right of Management to seek impoundment and sheltering of any animal found to be in violation of MHA rules, pending resolution of any dispute regarding such violations.
- Enforcing the prohibition of keeping any dog in any dwelling unit contained in a building structure that is not contiguous with an outdoor common area measuring at least four hundred (400) square feet in area.
- Accepting a written request for a second animal only if the animal is compatible with the first and only if the dwelling unit has an area spanning at least twelve hundred (1,200) square feet.
- The annual review by each retrospective Property Manager with the Resident Pet Owner of:
 - Each animal's registration, if applicable, including a copy of the annual veterinary examination.
 - Documentation of current rabies vaccination
 - Copy of the license issued by the City of Medford.

- Name and telephone number of the veterinarian who provides care to the animal

If a pet constitutes an immediate, serious threat to health or safety, Management may have the pet removed immediately.

Whenever it is reasonably determined that a pet constitutes a non-immediate threat to the health or safety of public housing residents, or otherwise creates a nuisance which disturbs the rights, comfort, peace, and quiet enjoyment of other residents, or if the owner of the pet becomes incapacitated or unable to care for the pet, after receipt of a written demand from Management, the Resident Pet Owner may request a meeting with the Pet Committee.

If the Pet Committee, for whatever reason, is unable or unwilling to reach a decision in the matter within forty-five (45) days of the request for a meeting by the Resident, Management may make a reasonable determination as to whether the pet is a threat to the health or safety of the public housing residents or caused a nuisance which disturbs the rights, comfort, peace, and quiet enjoyment of public housing residents and take appropriate remedial action. Management may also make the reasonable determination whether the Resident is able to care for the pet.

The Pet Committee shall be comprised of five members jointly selected by the Authority and the Resident Advisory Board and shall include at least two members of the MHA staff, one member of the MHA Resident Advisory Board, one MHA non-pet owner, and one member with veterinary and or pet obedience training experience.

All residents of the Medford Housing Authority who are eligible under HUD's Final Rule to keep a pet, will demonstrate that they have the physical, mental and financial capability to care for the pet (unless otherwise necessary as a reasonable accommodation to a person with a disability) as long as they abide by the conditions and restrictions outlined in the policy.

**FOLLOW-UP PLAN
RESIDENT SERVICE AND SATISFACTION SURVEY
ATTACHMENT NO. MA015D01**

FOLLOW-UP PLAN
RESIDENT SERVICE AND SATISFACTION SURVEY

Safety Section

The Authority is adding additional lighting in two of our developments and security cameras in one of those developments. The Authority is also partnering with an assisted housing private development company which has been awarded a federal grant in one of those developments which will provide additional security personnel. The Authority is installing a security fence and gate in a third development.

The reason that residents are not aware of a Neighborhood Watch or Tenant Patrol is because it was discontinued just prior to full implementation due to lack of resident interest. However, residents at our family development (MA015-1) are well aware of our Community Police Officer, although our elderly developments do not have a community policing program and are, therefore, not aware of this program which does not exist in our elderly development.

**COMMUNITY SERVICE REQUIREMENT
ATTACHMENT NO. MA015E01**

Description Implementation of
Public Housing Resident Community Service Requirements

The Medford Housing Authority has scheduled meetings with staff, in various departments, to plan the implementation of the community service requirements for federal public housing residents. The Authority will also meet with the local TANF agency to structure a cooperative working relationship and possibly a cooperative agreement to assist the Authority in verifying residents' status. All residents will be notified of the various requirements and opportunities as soon as the final procedure is formalized. It appears, at this time, that no significant lease changes will be necessary. Residents will be allowed to fulfill this service requirement at the Medford Housing authority, although in the event that opportunities are limited or ineffective at the Authority, the Authority will seek to place participants at community service positions in city government agencies. At this time, the Authority intends to administer the program through its own staff.

SUMMARY OF PROGRESS
ATTACHMENT NO. MA015F01

SUMMARY OF PROGRESS

Over the past year, the Medford Housing Authority has made additional efforts to increase communication with residents regarding construction and maintenance issues, as well as the availability of social service programs, and crime prevention programs. We have successfully worked closely with residents on various modernization improvements and we continue to deliver effective and prompt maintenance service.

Through our PHDEP grant, we have continued to implement desirable programs in conjunction with the Malden WMCA, Tufts University, and the Medford Police Department. The Community Police Officer at our federal family development has done an outstanding job and is well-known to an very familiar with our residents and the social problems in the development. The PHDEP grant which pays the Community Police Officer's salary has been one of the most effective and helpful sources of funding we have ever received.

We also have continued to improve the physical appearance of our federal developments within the apartments themselves, the interior common areas, and the external appearance, or curb appeal of the properties.

**MEDFORD HOUSING AUTHORITY
RESIDENT ADVISORY BOARD
ATTACHMENT NO. MA015G01**

MEDFORD HOUSING AUTHORITY
RESIDENT ADVISORY BOARD

Ms. Arlene Auterio
22 Allston Street
Apartment 118
Medford, Massachusetts 02155

Mr. Patrick Collins
22 Allston Street
Apartment 328
Medford, MA 02155

Ms. Catherine Curry
64 Marshall Street
Medford, MA 02155

Mr. Frank Guerriero
121 Riverside Avenue
Apartment 910
Medford, MA 02155

Ms. Tina LeBlanc
22 Allston Street
Apartment 331
Medford, MA 02155

Mr. Anthony LaPenna
121 Riverside Avenue
Apartment 603
Medford, MA 02155

Ms. Marilyn McNamara
121 Riverside Avenue
Apartment 803
Medford, MA 02155

**RESIDENT MEMBERSHIP
OF THE MHA GOVERNING BOARD
ATTACHMENT NO. MA015H02**

ATTACHMENT
Resident Membership
of the Medford Housing Authority Governing Board

The resident member of Medford Housing Authority Governing Board is Sylviajean Rice, a public housing family development resident who was appointed by the Mayor and whose term expires on April 8, 2004.

**DECONCENTRATION AND INCOME MIXING
ATTACHMENT NO. MA015I02**

Component 3, (6) Deconcentration and Income Mixing

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

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

If yes, list these developments as follows:

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