

# PHAPLans

**AnnualPlan forFY 2001**

**NATICK HOUSING AUTHORITY**  
**4 COTTAGE STREET**  
**NATICK, MASSACHUSETTS**  
**1-508-653-2971**

**NOTE:THISPHAPLANSTEMPLATE (HUD50075)ISTOBECOMPLETEDIN  
ACCORDANCEWITHINSTRUCTIONSLOCATEDINAPPLICABLEPIHNOTICES**

**PHA Plan  
Agency Identification**

**PHAName: NATICK HOUSING AUTHORITY**

**PHANumber: MA092**

**PHAFiscalYearBeginning: (m/y) JANUARY 1, 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**  
**PHAF ISCAL YEARS 2001 -2005**  
[24CFRPart903.5]

**The Natick Housing Authority is a public body politic and corporate, duly organized and existing pursuant to Massachusetts General Laws, Chapter 121B, Section 3, on November 6, 1948. The Natick Housing Authority currently maintains an Administrative Management Office at 4 Cottage Street, Natick, Massachusetts and has been conducting business at this location since 1984.**

**A. Mission**

## **Natick Housing Authority Mission Statement**

The Natick Housing Authority Board of Commissioners adopted the following Mission Statement and objectives:

A.) The Natick Housing Authority proclaims that its intended mission is consistent with that of the U.S. Department of Housing and Urban Development (HUD) and the Massachusetts Department of Housing and Community Development (DHCD). The NHA is therefore committed to the pursuit of adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.

In addition, the Natick Housing Authority will seek to:

- B.) provide access to affordable housing that supports families, neighborhoods, and economic self-sufficiency,
- C.) to manage, maintain, develop and create quality housing and housing related opportunities,
- D.) to assure that the all NHA rental assistance and public housing subsidy programs are funded and are well-run,
- E.) to consolidate the Section 8 Rental Assistance Certificate and Voucher programs,
- F.) to increase the number of working families on NHA programs,
- G.) to commit resources necessary to ensure that NHA staff have adequate training and supervision to accomplish their assigned responsibilities and to promote the mission of the Authority.

## **B.Goals**

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

- X**    **NHA Goal:** Expand the supply of assisted housing
- Objectives:
- X**    Apply for additional rental vouchers:
  - \_\_\_\_\_ Reduce public housing vacancies:
  - X**    Leverage private or other public funds to create additional housing opportunities:
  - X**    Acquire or build units or developments
  - \_\_\_\_\_ Other (list below)
- X**    **NHA Goal:** Improve the quality of assisted housing
- Objectives:
- \_\_\_\_\_ Improve public housing management: (PHAS score)
  - X**    Improve voucher management: (SEMAP score)
  - \_\_\_\_\_ Increase customer satisfaction:
  - X**    Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections)
  - \_\_\_\_\_ Renovate or modernize public housing units:
  - \_\_\_\_\_ Demolish or dispose of obsolete public housing:
  - \_\_\_\_\_ Provide replacement public housing:
  - \_\_\_\_\_ Provide replacement vouchers:
  - \_\_\_\_\_ Other: (list below)
- X**    **NHA Goal:** Increase assisted housing choices
- Objectives:
- X**    Provide voucher mobility counseling:
  - X**    Conduct outreach effort to potential voucher landlords
  - X**    Increase voucher payment standards
  - X**    Implement voucher homeownership program:
  - X**    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**

**X NHA Goal: Provide an improved living environment**

Objectives:

- \_\_\_ Implement measures to de-concentrate 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:  
Designated developments or buildings for particular resident groups (elderly, persons with disabilities)
- \_\_\_ Other: (list below)

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

**X NHA Goal: Promote self-sufficiency and asset development of assisted households**

Objectives:

- X** Increase the number and percentage of employed persons in assisted families:
- X** Provide or attract support services to improve assistances recipients' employability:
  - X** Provide or attract support services to increase independence for the elderly or families with disabilities.
- \_\_\_ Other: (list below)

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

**X NHA Goal: Ensure equal opportunity and affirmatively further fair housing**

Objectives:

- X** Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion, national origin, sex, familial status, and disability:
- X** 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:
  - X** 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)**

**NHA Objectives**

The Natick Housing Authority will continue to manage our existing Massachusetts (DHCD) conventional public housing programs and our Federal (HUD) Section 8 Rental Certificate and Voucher programs in an efficient and effective manner.

The NHA will pursue an effort to preserve program participant's tenancies and to receive affirmative and satisfactory ratings under Massachusetts MAP and SEMAP.

The Natick Housing Authority will additionally use the Section 8 certificate and voucher program to increase the housing choices available to very low-income households and elderly persons by making local privately owned rental housing more affordable in the community and accessible to each population.

**NHA 5 - Year Plan Mission and Goals: Progress Report**

The Natick Housing Authority will seek to develop new housing opportunities for people of very low-income and elderly persons by increasing through construction more affordable housing in our community.

The Natick Housing Authority will also seek to run homeownership programs designed to help people of very low, low and moderate income families realize the dream of homeownership.

**AnnualPHAPlan**  
**PHAFiscalYear2001**

[24CFRPart903.7]

**AnnualPlanType:**

**StandardPlan**

**StreamlinedPlan:**

**HighPerformingPHA**

**SmallAgency(<250PublicHousingUnits)**

**AdministeringSection8Only**

**TroubledAgencyPlan**

**ExecutiveSummaryoftheAnnualPHAPlan**

[24CFRPart903.79(r)]

TheNatickHousingAuthorityhaspreparedour **AgencyPlan** inaccordancewith the QualityHousingandWorkResponsibilityActof1998 andallensuingHUD requirements.

TheNatickHousingAuthorityBoardhasadoptedthefollowing **MissionStatement** to guidetheagencyandourhousingrelatedactivities:

TheNatickHousingAuthority proclaimsthatit'sintendedmissionisconsistentwith thatoftheU.S.DepartmentofHousingandUrbanDevelopment(HUD)andthe MassachusettsDepartmentofHousingandCommunityDevelopment(DHCD).The NHAisthereforecommittedtothepursuitofadequateandaffordablehousing, economicopportunityandasuitablelivingenvironmentfreefromdiscrimination.

Inaddition,theNatickHousingAuthoritywillseekto:

- provideaccesstoaffordablehousingthatsupportsfamilies,neighborhoods,and economic self-sufficiency,
- tomanage,maintain,developandcreatequalityhousingandhousingrelated opportunities,
- toassurethatalINHArentalassistanceandpublichousingsubsidyprograms arefundedandwellrun,
- toconsolidatetheSection8RentalAssistanceCertificateandVoucher programs.
- ToincreasethenumberofworkingfamiliesonNHAproms
- TocommitresourcesnecessarytoensurethatNHASTAFF haveadequate trainingandsupervisiontoaccomplishtheirassignedresponsibilitiesandto promotethemissionoftheAuthority.

# Annual Plan Table of Contents

[24CFR Part 903.79(r)]

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## Attachments

### Required Attachments:

- \_\_\_ Admissions Policy for Deconcentration
- \_\_\_ FY2000 Capital Fund Program Annual Statement
- \_\_\_ Most recent board -approved operating budget (Required Attachment for PHA that are troubled or at risk of being designated troubled ONLY)

### Optional Attachments:

- \_\_\_ PHA Management Organizational Chart
- \_\_\_ FY2000 Capital Fund Program 5 Year Action Plan
- \_\_\_ Public Housing Drug Elimination Program (PHDEP) Plan
- \_\_\_ Comments of Resident Advisory Board Member(s)  
(must be attached if not included in PHA Plan text)
- \_\_X\_\_ Other (List below, providing each attachment name)

## MA092a003 Resident Advisory Board

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
<b>X</b>	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
<b>X</b>	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
	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
	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
	Most recent board -approved operating budget for the public housing program	Annual Plan: Financial Resources;
	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
<b>X</b>	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
	Public Housing Deconcentration and Income Mixing Documentation: PHA board certification 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 18. Documentation of the required Deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
	Public housing rent determination policies, including the methodology for setting public housing flat rents check here if included in the public housing A&O Policy	Annual Plan: Rent Determination

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	Schedule of flat rents offered each public housing development check here if included in the public housing A&O Policy	Annual Plan: Rent Determination
<b>X</b>	Section 8 rent determination (payment standard) policies check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
	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
	Public housing grievance procedures check here if included in the public housing A&O Policy	Annual Plan: Grievance Procedures
<b>X</b>	Section 8 informal review and hearing procedures check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
	The HUD -approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option )	Annual Plan: Capital Needs
	Approved HOPEVI applications or, if more recent, approved or submitted HOPEVI 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
<b>X</b>	Policies governing any Section 8 Homeownership program 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
	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self -Sufficiency

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
	The most recent Public Housing Drug Elimination Program (PHDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
<b>X</b>	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.State mentofHousingNeeds

[24CFRPart903.79(a)]

## A. HousingNeedsofFamiliesintheJurisdiction/sServedbytheNHA

<b>HousingNeedsofFamiliesintheNatick,Massachusetts</b>							
<b>byFamilyType</b>							
FamilyType	Ove rall	Afford-ability	Supply	Quality	Access-ability	2 Size	Location
Income<=30% ofAMI	1,615	5	5	5	5	3	4
Income>30%but <=50%ofAMI	599	5	5	5	5	3	4
Income>50%but <80%ofAMI	219	4	5	4	5	3	4
Elderly	423	5	3	3	3	3	4
Familieswith Disabilities	N/A	5	5	4	5	3	4
Race/Ethnicity (White)	1,595	5	5	5	5	3	4
Race/Ethnicity (Hispanic)	180	5	5	5	5	3	4
Race/Ethnicity (Black)	381	5	5	5	5	3	4

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: \_\_\_\_

\_\_\_\_ U.S. Census data

\_\_\_\_ Comprehensive Housing Affordability Strategy (“CHAS”) dataset

\_\_\_\_ American Housing Survey data

Indicate year: \_\_\_\_

Other housing market study

Indicate year: 1999

Other sources: (list and indicate year of information)

- Actual 1999 NHA Waiting List Demographics.

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

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

### B.

<b>Housing Needs of Families on the Waiting List Natick Housing Authority</b>			
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/sub -jurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	<b>902</b>		
Extremely low income <= 30% AMI	<b>532</b>	<b>59%</b>	
Very low income (>30% but <=50% AMI)	<b>279</b>	<b>31%</b>	
Low income (>50% but <80% AMI)	<b>91</b>	<b>10%</b>	
Families with children	<b>722</b>	<b>80%</b>	
Elderly families	<b>3</b>	<b>1%</b>	
Families with Disabilities	<b>206</b>	<b>23%</b>	
Race/ethnicity (White)	<b>553</b>	<b>61%</b>	
Race/ethnicity (Black)	<b>179</b>	<b>20%</b>	
Race/ethnicity (Hispanic)	<b>170</b>	<b>19%</b>	

**Housing Needs of Families on the Waiting List  
Natick Housing Authority**

**Natick Housing Authority**

1BR	<b>343</b>		
2BR	<b>285</b>		
3BR	<b>234</b>		
4BR	<b>36</b>		
5BR	<b>4</b>		
5+BR			

Is the waiting list closed (select one)?      **Yes**

If yes:

**B.** How long has it been closed (# of months)?      **36 months**

Does the PHA expect to reopen the list in the PHA Plan year?      **Yes**

Does the PHA permit specific categories of families onto the waiting list, even if generally closed?      **No**

## C.StrategyforAddressingNeeds

Provide a brief description of the PHAs 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 alleligible populations**

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

- 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 -uprates 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 -uprates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- Maintain or increase Section 8 lease -uprates 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:**

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

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

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

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

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

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

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

**B. 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 voucher targeted to the elderly, should they become available
- Other: (list below)

**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 voucher 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**

Select if applicable

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

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

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

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

## Statement of Financial Resources

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.

[24CFR Part 903.79(b)]

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2001 grants)</b>		
a) Public Housing Operating Fund		
b) Public Housing Capital Fund		
c) HOPEVI Revitalization		
d) HOPEVI Demolition		
e) Annual Contributions for Section 8 Tenant -Based Assistance	<b>\$777,199.00</b>	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	N/A	
g) Resident Opportunity and Self -Sufficiency Grants	N/A	
h) Community Development Block Grant	N/A	
i) HOME	N/A	
Other Federal Grants (list below)		

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>2. Prior Year Federal Grants (un-obligated funds only) (list below)</b>		
<b>3. Public Housing Dwelling Rental Income</b>	N/A	
<b>4. Other income (list below)</b>	N/A	
<b>4. Non-federal sources (list below)</b>	N/A	
<b>Total resources</b>	<b>\$777,199.00</b>	

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

[24CFR Part 903.79(c)]

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

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

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

- a. When does the PHA verify eligibility for admission to public housing?  
(select all that apply)
- \_\_\_ When families are within a certain number of being offered a unit: (state number)
- \_\_\_ When families are within a certain time of being offered a unit: (state time)
- \_\_\_ Other: (describe)
- b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?
- \_\_\_ Criminal or Drug-related activity
- \_\_\_ Rental history
- \_\_\_ Housekeeping
- \_\_\_ Other (describe)
- c. \_\_\_ Yes \_\_\_ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- d. \_\_\_ Yes \_\_\_ No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- e. \_\_\_ Yes \_\_\_ No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC - authorized source)

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

- a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)
- \_\_\_ Community-wide list
- \_\_\_ Sub-jurisdictional lists
- \_\_\_ Site-based waiting lists
- \_\_\_ Other (describe)
- b. Where may interested persons apply for admission to public housing?
- \_\_\_ PHA main administrative office
- \_\_\_ PHA development site management office
- \_\_\_ Other (list below)
- c. If the PHA plan 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 admission to public housing to families at or below 30 % of median area income?
- b. Transfer policies:

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

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

a. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Household that contribute to meeting income goals (broad range of incomes)
- Household 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 points system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

\_\_\_\_ Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

- \_\_\_\_ Working families and those unable to work because of age or disability
- \_\_\_\_ Veterans and veterans' families
- \_\_\_\_ Residents who live and/or work in the jurisdiction
- \_\_\_\_ Those enrolled currently in educational, training, or upward mobility programs
- \_\_\_\_ Household that contributes to meeting income goals (broad range of incomes)
- \_\_\_\_ Household that contributes 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
- Anytime family composition changes
- At family request for revision
- Other (list)

**(6) Deconcentration and Income Mixing**

a.  Yes  No: Did the PHA 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 development 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 affirmativemarketing
- 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)

- NHA main administrative office
- Other (list below)

**(3) Search Time**

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

If yes, state circumstances below:

**If the family documents their efforts to find housing and additional time can reasonably be expected to result in securing a unit if the family contains a person with a disability.**

**(4) Admissions Preferences**

a. Income targeting

**Yes**  **No**: Does the NHA 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 NHA 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
- Household that contribute to meeting income goals (broad range of incomes)
- Household 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 points system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc. \_\_\_\_\_ Date and Time

Former Federal preferences

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

Other preferences (select all that apply)

- \_\_\_\_\_ Working families and those unable to work because of age or disability
- \_\_\_\_\_ Veterans and veterans' families
- \_\_\_\_\_ Residents who live and/or work in your jurisdiction
- \_\_\_\_\_ Those enrolled currently in educational, training, or upward mobility programs
- \_\_\_\_\_ Household that contribute to meeting income goals (broad range of incomes)
- \_\_\_\_\_ Household 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 the 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 preference 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 admission to any special -purpose section 8 program administered by the NHA contained? (select all that apply)

The NHA's Section 8 Administrative Plan

Briefing sessions and written materials

Other (list below)

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

Through published notices

Other (list below)

**Local community access television, notification to area local non -profit agencies serving low and moderate income people and community service organizations.**

**4. PHA Rent Determination Policies**

[24CFR Part 903.79(d)]

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

**A. Public Housing**

**(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 :

a. Rents set at less than Does the PHA plan to charge rents at a fixed amount or percentage less than 30% of adjusted income? than 30% than adjusted income

1.  Yes  No:

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

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

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

- \_\_\_\_\_ For the non-reimbursed medical expenses of non-disabled or non-elderly families
- \_\_\_\_\_ Other (describe below)

e. Ceiling rents

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

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

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

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

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

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

f. Rent redeterminations:

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
- \_\_\_\_\_ Anytime the family experiences an income increase
- \_\_\_\_\_ Anytime a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold) \_\_\_\_\_

\_\_\_\_\_ Other(listbelow)

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.)

- \_\_\_\_\_ This 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)

## **B. Section 8 Tenant -Based Assistance**

Exemptions: PHAs that do not administer Section 8 tenant -based assistance are not required to complete sub-component 4 B. **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 NHA'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)

### **HUD approved Natick Housing Authority in its approval of DHCD.**

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 NHA'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)

- **Month to month reevaluation of the payment standard and its adequacy will be made.**

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 NHA's minimum rent? (select one)

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

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

**5. Operations and Management**

[24CFR 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 NHA's management structure and organization is attached.

X A brief description of the management structure and organization of the NHA follows:

**The Natick Housing Authority currently administers over 550 State of Massachusetts assisted housing units, covering seven different programs. The NHA is involved in local housing, 236 units, funded by the state of Massachusetts' Housing Finance Agency (MHFA) and runs a Federal Rental Assistance (102 Certificates/Vouchers) Program administered by HUD. The Authority manages six different development sites providing maintenance, management and social service programs for residents. The NHA additionally, expends in excess of \$200,000 a year in modernization projects and activities to maintain and increase the livability of our units. The NHA Board of Directors sets policy and direction for the Authority and the Executive Director, with the help of the Assistant Director and our administrative staff, oversees the daily operations. Our experienced and diverse maintenance department performs preventative maintenance services as well as small modernization projects or daily work orders.**

**Natick Housing Authority Organizational Chart**

- NHA Board of Commissioners
- Executive Director
- Assistant Executive Director
- Administrative Assistant
- Housing Manager/Inspector
- Family Housing Coordinator
- Elderly Housing Coordinator
- Congregate Housing Coordinator
- Resident Services/Social Worker
- Maintenance Supervisor
- Assistant Maintenance Supervisor
- Maintenance Mechanic/Electrical,
- Maintenance Mechanic/Plumbing
- Maintenance Mechanic, Maintenance Mechanic, Maintenance Mechanic, Maintenance Mechanic
- Maintenance Aide

**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, 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
--------------	--	-------------------

PublicHousing	NA	NA
Section8Vouchers		
Section8Certificates	<b>102</b>	<b>20</b>
Section8ModRehab	NA	NA
SpecialPurposeSection8 Certificates/Vouchers(list individually)		
PublicHousingDrug EliminationProgram (PHDEP)		
OtherFederalPrograms (listindividually)		

### C.ManagementandMaintenancePolicies

ListthePHA'spublichousingmanagementandmaintenancepolicydocuments,manualsandhandbooksthatcontaintheAgency's rules,standards,andpolicies 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)PublicHousingMaintenanceandManagement:(listbelow)

(2)Section8Management:(listbelow)

**All policies and procedures governing NHA Management of our Section 8 Rental Assistance Program are explained in the Agency's Administrative Plan for our Housing Choice Voucher Program, amended February 9, 2000.**

**6. PHA Grievance Procedures**

[24CFR Part 903.79(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 24CFR Part 966, Subpart B, for residents of public housing?

If yes, list additions to federal requirements below:

2. Which PHA offices 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 NHA 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 24CFR 982?

If yes, list additions to federal requirements below:

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

- NHA main administrative office
- Other (list below)

## **7. Capital Improvement Needs**

[24CFR 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 as Attachment (state name)

-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 as Attachment (state name)

-or-

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

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

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

Yes  No: a) Has the PHA received a HOP EV 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 Plans 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 -financed 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**

Applicability of component 8: Section 8 only PHAs are not required to complete this section.  
[24 CFR Part 903.79(h)]

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

**2. Activity Description**

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

<b>Demolition/Disposition Activity Description</b>	
1a. Development name:	
1b. Development (project) number:	
2. Activity type: <u>    </u> <u>    </u> Demolition <u>    </u> <u>    </u> Disposition	
3. Application status (select one) <u>    </u> Approved <u>    </u> Submitted, pending approval <u>    </u> Planned application	
4. Date application approved, submitted, or planned for submission:	(DD/MM/YY)
5. Number of units affected: Coverage of action (select one) <u>    </u> Part of the development <u>    </u> 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** [24CFR Part 903.79(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.

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

**10. Conversion of Public Housing to Tenant-Based Assistance**

[24 CFR Part 903.79(j)]

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

**A. Assessment of Reasonable Revitalization Pursuant to section 202 of the HUD FY1996 HUD Appropriations Act**

1.  Yes  No: Have any of the NHA's developments or portions of developments been identified by HUD or the PHA as covered under section 202 of the HUD FY1996 HUD Appropriations

Act?(If“No”,skiptocomponent11;if“yes”,completeone activitydescriptionforeachidentifieddevelopment,unless eligibletocompletea streamlinedsubmission.PHAs completingstreamlinedsubmissionsmayskiptocomponent 11.)

2.ActivityDescription

\_\_\_ Yes \_\_\_ No: HasthePHAprovidedallrequiredactivitydescription informationforthiscomponentinthe **optional**PublicHousing AsstManagementTable?If“yes”,skiptocomponent11.If “No”,completetheActivityDescriptiontablebelow.

<b>ConversionofPublicHousingActivityDescription</b>	
1a.Developmentname:	
1b.Development(project)number:	
2.Whatisthestatusof therequiredassessment?	
___ Assessmentunderway	
___ AssessmentresultssubmittedtoHUD	
___ AssessmentresultsapprovedbyHUD(ifmarked,proceedtonextquestion)	
___ Other(explainbelow)	
3. ___ Yes ___ No:IsaConversionPlanrequired	?(Ifyes,gotoblock4;ifno,goto block5.)
4.StatusofConversionPlan(selectthestatementthatbestdescribesthecurrent status)	
___ ConversionPlanindevelopment	
___ ConversionPlansubmittedtoHUDon:(DD/MM/YYYY)	
___ ConversionPlanapprovedbyHUDon:(DD/MM/YYYY)	
___ ActivitiespursuanttoHUD -approvedConversionPlanunderway	
5.DescriptionofhowrequirementsofSection202arebeingsatisfiedbymeansother thanconversion(selectone)	
___ Unitsaddressedinapendingorapproveddemolitionapplication(date submittedorapproved:	
___ UnitsaddressedinapendingorapprovedHOPEVIDemolitionapplication (datesubmittedorapproved:)	
___ UnitsaddressedinapendingorapprovedHOPEVIREvitalizationPlan(date submittedorapproved:)	
___ Requirementsnolongerapplicable:vacancyratesarelessthan10percent	
___ Requirementsnolongerapplicable:sitenowhaslessthan300units	
___ Other:(describebelow)	

**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**

[24CFR Part 903.79(k)]

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

**A. Public Housing**

1. \_\_\_ Yes  No: Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved

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

2. Activity Description

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

<b>Public Housing Homeownership Activity Description (Complete one for each development affected)</b>
1a. Development name: 1b. Development (project) number:
2. Federal Program authority: <input type="checkbox"/> HOPEI <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 NHA 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 NHA'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**

[24CFR Part 903.79(1)]

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

**A. PHA Coordination with the Welfare (TANF) Agency**

1. Cooperative agreements:

Yes  No  Has the NHA 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 NHA 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 programsto 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 home ownership option participation
- \_\_\_\_\_ Preference/eligibility for section 8 home ownership option participation
- \_\_\_\_\_ Other policies (list below)

b. Economic and Social self-sufficiency programs

\_\_\_\_\_ Yes \_\_\_\_\_ No: Does the PHA coordinate, promote or provide any programsto enhance the economic and social self-sufficiency of assisted families?

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.)

<b>Services and Programs</b>				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office/ PH main office/ other provider name)	Eligibility (public housing or section 8 participants or both)

**(2) Family Self Sufficiency program/s**  
a. Participation Description

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

b.  Yes  No: If the PHA is not maintaining the minimum size required by HUD, does the most recent FSS Action Plan address the steps the PHA plan to take to achieve at least the minimum program size?  
 If no, list steps the PHA will take below:

**C. Welfare Benefit Reductions**

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income change 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**

[24CFR Part 903.79(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 area surrounding or adjacent to the PHA's developments
- Residents fearful for their safety and/or the safety of their children
- Observed lower -level crime, vandalism and/or graffiti
- People on waiting list unwilling to move into one or more developments due to perceived and/or actual levels of violent and/or drug -related crime
- Other (describe below)

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

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

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

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

1. List the crime prevention activities the PHA has undertaken or plan 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(describ below)

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

**C.Coordination between PHA and the police**

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

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

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

**D. Additional information as required by PHDEP/PH DEP 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.

(AttachmentFilename:\_\_\_)

**14.RESERVEDEFORPETPOLICY**

[24CFRPart903.79(n)]

## **15. Civil Rights Certifications**

[24CFRPart903.79(o)]

**Civil Rights Certifications are included in the PHA Plan's Certifications of Compliance with PHA Plans and Related Regulations.**

## **16. Fiscal Audit**

[24CFRPart903.79(p)]

1.  **Yes**  **No**: Is the NHA 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 : Werethereanyfindingsastheresultofthataudit?
4. \_\_\_ Yes \_\_\_ No: Ifther ewereanyfindings,doanyremainunresolved?  
Ifyes,howmanyunresolvedfindingsremain? \_\_\_
5. \_\_\_ Yes \_\_\_ No: Haveresponsestoanyunresolvedfindingsbeensubmittedto  
HUD?  
Ifnot,whenaretheydue(statebelow)?

## **17. PHA Asset Management**

[24CFRPart903.79(q)]

Exemptions from component 17: Section 8 Only PHAs are not required to complete this component.  
HighperformingandsmallPHAsarenorequiredtocompletethiscomponent.

1. \_\_\_ Yes \_\_\_ No: IsthePHAengaginginanyactivitiesthatwillcontributetothe

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 903.79(r)]

### **A. Resident Advisory Board Recommendations**

1.  Yes  No Did the NHA 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 (Filename)

\_\_\_\_ Provided below:

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

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

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

\_\_\_\_ List changes below:

\_\_\_\_ Other: (list below)

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

1.  Yes \_\_\_ No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937?

(If no, continue to question 2; if yes, skip to sub -component C.)

2. \_\_\_ Yes \_\_\_ No: Was the resident who serves on the NHA 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 NHA assistance

Self-nomination:

Candidates registered with the PHA and requested a place on ballot

\_\_\_\_ Other: (describe)

b. Eligible candidates: (select one)

\_\_\_\_ Any recipient of NHA assistance

\_\_\_\_ Any head of household receiving NHA assistance

Any adult recipient of NHA assistance

\_\_\_\_ Any adult member of a resident or assisted family organization

\_\_\_\_ Other (list)

c. Eligible voters: (select all that apply)

\_\_\_\_ All adult recipients of NHA assistance (public housing and section 8 tenant based assistance) -

\_\_\_\_ Representatives of all NHA resident and assisted family organizations

**X**\_\_\_\_ Other ( list)

**Selection was made by Tenant nomination, a willingness to serve and NHA Board appointment.\***

**\*(Tenant Liaison board designation).**

### **“FY2001” NHA Board Of Commissioners**

Chairwoman	Virginia M. Doucette
Vice Chairman	Edward J. Hurst
Treasurer	Thomas L. Huddy (State Appointee)
Assistant Treasurer	Anthony J. Onorato
Commissioner	James M. White
Tenant Liaison	M. Christine Hedderig (Federal Appointee)
Executive Secretary	Edward L. Santos, Executive Director

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

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

1. Consolidated Plan jurisdiction: (provide name here)

**Commonwealth of Massachusetts  
Department of Housing & Community Development (DHCD).**

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

The NHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.

The NHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.

The NHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.

Activities to be undertaken by the NHA in the coming year are consistent with the initiatives contained in the Consolidated Plan.

Other: (list below)

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

**Natick, Massachusetts is quickly losing a lot of its affordable housing stock due to the area's economic prosperity and the rising cost of private housing and rental shelter. Natick Housing Authority, to counteract this trend, plans to develop and build new conventional affordable housing reserved for individuals, working families and people and families with disabilities whose seem to be unable to live in this community any longer.**

## **D. Other Information Required by HUD**

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

# **Attachments**

**MA092a003**

**The Natick Housing Authority has a tenant liaison on the NHA Board. She serves as the resident advisory board for the Section 8 Program. She is advised of the opportunity for a resident to serve on the governing board.**

**To date the NHA has not been notified of the intention of any federally assisted tenant to run for an open seat on the board.**

# PHA Plan Table Library

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

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

Capital Fund Grant Number FFY of Grant Approval: (MM/YYYY)

Original Annual Statement

Line No.	Summary by Development Account	Total Estimated
1	Total Non -CGP Funds	
2	1406 Operations	
3	1408 Management Improvements	
4	1410 Administration	
5	1411 Audit	
6	1415 Liquidated Damages	
7	1430 Fees and Costs	
8	1440 Site Acquisition	
9	1450 Site Improvement	
10	1460 Dwelling Structures	
11	1465 Dwelling Equipment - Nonexpendable	
12	1470 Non Dwelling Structures	
13	1475 Non Dwelling Equipment	
14	1485 Demolition	
15	1490 Replacement Reserve	
16	1492 Move to Work Demonstration	
17	1495 Relocation Costs	
18	1498 Mod Used for Development	
19	1502 Contingency	
20	<b>Amount of Annual Grant (Sum of lines 2 - 19)</b>	
21	Amount of line 20 Related to I.B.P. Activities	
22	Amount of line 20 Related to Section 504 Compliance	
23	Amount of line 20 Related to Security	
24	Amount of line 20 Related to Energy Conservation Measures	

**AnnualStatement  
CapitalFundProgram(CFP)PartII:SupportingTable**

Development Number/Name HA-WideActivities	GeneralDescriptionofMajorWork Categories	Development Account Number	Total Estimated Cost

**AnnualStatement  
CapitalFundProgram(CFP)PartIII:ImplementationSchedule**

Development Number/Name HA-WideAct ivities	AllFundsObligated (QuarterEndingDate)	AllFundsExpended (QuarterEndingDate)

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

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

Optional 5 -Year Action Plan Tables			
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development
Description of Needed Physical Improvements or Management Improvements		Estimated Cost	Planned Start Date (HA Fiscal Year)
<b>Total estimated cost over next 5 years</b>			

