

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

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# PHA Plans

Annual Plan for Fiscal Year 2002

**ORLANDO HOUSING  
AUTHORITY**

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

## PHA Plan Agency Identification

PHA Name: Orlando Housing Authority

PHA Number: FL004

PHA Fiscal Year Beginning: 04/2002

### 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  
300 Reeves Court, Orlando, FL 32801
- 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  
City of Orlando
- Main administrative office of the County government  
Orange County
- Main administrative office of the State government
- Public library
- PHA website
- Other (list below)

PHA Plan Supporting Documents are available for inspection at: (select all that apply)

- Main business office of the PHA
- PHA development management offices
- Other (list below)

**Annual PHA Plan  
PHA Fiscal Year 2002**

[24 CFR Part 903.7]

**ORLANDO HOUSING AUTHORITY  
FL004**

**Annual Plan Type:**

Select which type of Annual Plan the PHA will submit.

- Standard Plan**  
***The Orlando Housing Authority is a High Performing PHA. It has chosen to submit the Standard Plan to clearly convey its plan to effectively serve the housing and related needs of lower income families in the City of Orlando and Orange County.***
- Streamlined Plan:**
- High Performing PHA**
  - Small Agency (<250 Public Housing Units)**
  - Administering Section 8 Only**
- Troubled Agency Plan**

## **Executive Summary of the Annual PHA Plan**

[24 CFR Part 903.7 9 (r)]

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.

# **ORLANDO HOUSING AUTHORITY AGENCY PLAN**

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## *Executive Summary*

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### **Background**

On February 19, 1999, HUD issued regulations implementing provisions of the Quality Housing and Work Responsibility Act of 1998 (QHWRA). These regulations required each Public Housing Authority (PHA) to develop a Five-Year Plan with a statement of its Mission, Goals, and Objectives. QHWRA also requires PHA's to prepare an Annual Plan with a statement of housing needs of the lower income population in its community, along with the strategies, policies and resources to be used in addressing those needs. Significant changes to the Five-Year Plan and development of each Annual Plan are to be done in consultation with PHA Public Housing residents and Voucher recipients and offered for review and comment by the public. Finally, the Plans are to be consistent with the Consolidated Plans of the governmental unit(s) within the PHA's jurisdiction.

### **Planning Process**

During the period of July - December 2000, the OHA engaged in a collaborative planning process resulting in the development of a detailed Strategic Plan for implementing the general goals and objectives of the PHA Five Year Plan submitted in February 2000 for the five years commencing April 1, 2000. From November 2001 through January 2002, OHA Commissioners, OHA Staff, Public Housing residents, Section 8 Housing Choice Voucher participants, and other OHA partners participated in reviewing OHA's progress in the Second Plan Year (FY April 2001). These individuals also participated in planning to quantify and specify appropriate strategies and expected outcomes of OHA activities for the Third Plan Year (FY April 2002) to meet the housing and related needs of lower income families in Orange County. On January 10, 2002, the OHA conducted a public hearing in which the general public had an opportunity to present their views and comments on the Agency Plan. Additional opportunities for review, input and comment by residents, stakeholders and the public were provided throughout the planning process.

## Challenge Statement

The OHA's service area encompasses the jurisdictions of Orange County Government and the City of Orlando. Both governmental units are CDBG Entitlement Communities and therefore required to develop, and regularly update, Consolidated Plans. Based on the data and conclusions contained in the current Consolidated Plans for those governmental units, the key housing-related challenges faced by lower income families are:

1. Limited supply and locations of affordable housing for Extremely Low- and Very Low-Income families;
2. Limited availability and accessibility of affordable housing for the elderly and disabled;
3. Limited availability of affordable homeownership opportunities for Low-Income families.

In addition to data and conclusions contained in the Consolidated Plans, the OHA and its partners identified several obstacles to the provision of affordable housing. They included, but were not necessarily limited to:

1. Lack of public support for affordable housing development; and
2. High cost of housing development.

Lower income families, especially those who are current and potential recipients of OHA program benefits, were determined to have non-housing challenges that impact their ability to obtain suitable quality housing. Among those challenges and obstacles are:

1. High unemployment due to a lack of job skills and job preparedness;
2. Lower levels of educational attainment;
3. Low wages; and
4. High level of dependence on federal assistance.

## Mission, Goals, Strategies

The mission of the OHA is to *“To lead public-private partnerships in advocating and facilitating affordable housing in decent neighborhoods and self-sufficiency for deserving residents of Orlando and Orange County. Through housing development, housing management, supportive services, and housing advocacy, the OHA fosters quality living environments with a choice of affordable housing options, and offers opportunities for economic independence for its program beneficiaries.”* This mission will be accomplished through the development and preservation of affordable housing, ensuring equal opportunity in housing, promoting self-sufficiency, and improving quality of life for lower income residents.

### Affordable Housing

Consistent with HUD's Strategic Goal of *“Increasing the availability of decent, safe and*

*affordable housing in American Communities*”, the OHA will develop and/or preserve 500 units of affordable housing during the period of its 5 Year Plan. Rental housing will be targeted to the extremely low- and very-low income families, while homeownership opportunities will be created for low-income families. Housing opportunities for the elderly and disabled will also be created.

**Third Plan Year** goals are:

5. Develop the capacity to create and manage a range of housing initiatives
6. Implement measures to add 100 units of quality, affordable mixed-income housing for rental by lower to moderate income individuals or families, and replace housing lost through conversion, demolition and disposition.
7. Develop 5 of affordable units for homeownership by lower-income families
8. Apply for funds to preserve the affordable nature of units of subsidized housing that are currently at risk from expired/expiring restrictions for use as low-income housing.

### *Equal Housing Opportunity*

With respect to HUD’s strategic goal of “*Ensuring equal opportunity in housing for all Americans*”, the OHA will seek to facilitate affordable housing opportunities in areas outside of those with concentrations of low-income families. This includes expanding housing options for Section 8 program participants as well as developing affordable housing outside of areas of low-income concentrations. **Third Plan Year** goals are:

1. Achieve geographic diversity with the placement of 80% of new affordable units in areas with income levels above 50% of area median income.
2. Increase the percentage of all Section 8 mover families with children who move to low-poverty census tracts to 2% points higher than the percentage of Section 8 families with children residing in low poverty census tracts at the end of FY 2001.
3. Achieve mandatory income mixes in public housing.

The OHA will accomplish the first two goals through the use of education and public information as the primary strategy. By creating a better-informed general population and a more knowledgeable group of program recipients and potential housing providers, resistance and obstacles to dispersed affordable housing can be reduced. The implementation of new policies and procedures will be the primary method of accomplishing deconcentration in public housing.

### Self-Sufficiency

The OHA will address HUD's strategic goal of "*Promoting self-sufficiency and asset development*" of families and individuals by creating an environment where residents who want to achieve self-sufficiency will have every opportunity to do so. Utilizing existing and newly created partnerships to offer an array of services, the OHA will facilitate employment, training, and educational opportunities to program participants. Greater resident responsibility for work will be accomplished through implementation of policies and procedures that encourage work and reward success. Homeownership will be a vehicle through which asset development will be accomplished. Resident business development will be achieved through a combination of training, technical assistance and financial support for business start-up. **Third Plan Year** goals are:

3. Achieve employment of at least one non-elderly/non-disabled adult family member in 20% of public housing households not already engaged in an employment activity.
2. Increase employment of Section 8 Housing Choice Voucher family members by 2%
3. Enable 3 beneficiaries of tenant-based assistance to become homeowners
4. Enable 2 public housing families to achieve homeownership
5. Facilitate the development and operation of 1 additional resident-owned business

### Quality of Life

Consistent with HUD's strategic goal of "*Improving quality of life and economic viability*", the OHA will plan and execute physical, social improvements, and operational improvements resulting in an improved living environment and enhanced customer service. **Third Plan Year** goals are:

9. Complete a survey to determine the level of satisfaction among residents in neighborhoods containing two public housing sites
10. Implement a plan to increase the economic viability of the OHA by reducing the need for HUD funding by 2%
11. Improve the physical condition of existing OHA-owned or managed housing units to achieve rent-comparability with standard quality housing in the local real estate development market
4. Increase by 10% the number of local residents with a favorable image of the OHA and program beneficiaries

12. Increase effective resident involvement in improvement initiatives

13. Increase the ability of OHA to provide quality services by improving employee performance, productivity and customer service

OHA plans to accomplish the goals through careful planning and execution of capital improvements, utilization of partnerships to plan and initiate neighborhood improvements, strengthen partnerships with resident organizations, and operational/administrative changes to enhance agency efficiency.

Third year activities will include targeting neighborhoods for collaborative improvement activities, assessing the household stock, continuing a public relations program, providing technical assistance to resident organizations, and identifying methods for improving the efficiency and effectiveness of its program delivery.

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## Conclusion

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The OHA's Five-Year Plan and the Third Annual Plan have the broad support of the resident, human service and non-profit community. Additionally, the OHA's mission, goals and objectives are consistent with the needs and priorities of expressed by local government in their Consolidated Plans. The Third Annual Plan was prepared with a high level of community involvement and input, and the strategies resulting therefrom will help the OHA stand out as a leader in affordable housing throughout the City of Orlando and Orange County.

# **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**

#### **Required Attachments:**

- Brief Statement of Progress in Meeting the Five Year Plan Mission & Goals **Attachment A**
- Admissions Policy for Deconcentration **Attachment B**
- Voluntary Conversion Required Initial Assessment **Attachment C**
- Description of Implementation of Community Service Requirements **Attachment D**
- Description of Pet Policy **Attachment E**
- Most recent Board Approved Operating Budget **Attachment F**
- Resident Advisory Board Recommendations **Attachment G**
- Announcement of Membership of the Resident Advisory Board **Attachment H**
- Resident Membership of the PHA Governing Board **Attachment I**
- Definition of Substantial Deviation or Significant Amendment **Attachment J**

#### **Optional Attachments:**

- FY 2001 Capital Fund Program Third Plan Year Action Plan **Attachment K**

Section 8 Homeownership Capacity Statement **Attachment L**

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.

**Supporting Documents Available for Review**

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
<input checked="" type="checkbox"/>	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	Annual Plan
<input checked="" type="checkbox"/>	State/Local Government Certification of Consistency with the Consolidated Plan	Annual Plan
<input checked="" type="checkbox"/>	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.	Annual Plan
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
<input checked="" type="checkbox"/>	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP] In revision for implementation 4/1/01	Annual Plan: Eligibility, Selection, and Admissions Policies
<input checked="" type="checkbox"/>	Section 8 Administrative Plan.	Annual Plan: Eligibility, Selection, and Admissions Policies
<input checked="" type="checkbox"/>	Public Housing De-concentration and Income Mixing Documentation.	Annual Plan: Eligibility, Selection, and Admissions Policies
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	Schedule of flat rents offered at each public housing development check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
<input checked="" type="checkbox"/>	Section 8 rent determination (payment standard) policies check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
<input checked="" type="checkbox"/>	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

Applicable & On Display	Supporting Document	Supporting Document	Supporting Document	Applicable Plan Component
<input checked="" type="checkbox"/>	Public housing grievance procedures check here if included in the public housing A & O Policy			Annual Plan: Grievance Procedures
<input checked="" type="checkbox"/>	Section 8 informal review and hearing procedures check here if included in Section 8 Administrative Plan			Annual Plan: Grievance Procedures
<input checked="" type="checkbox"/>	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year			Annual Plan: Capital Needs
N/A	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant			Annual Plan: Capital Needs
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	Approved or submitted applications for demolition and/or disposition of public housing			Annual Plan: Demolition and Disposition
<input checked="" type="checkbox"/>	Approved or submitted applications for designation of public housing (Designated Housing Plans)			Annual Plan: Designation of Public Housing
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	Approved or submitted public housing homeownership programs/plans			Annual Plan: Homeownership
<input checked="" type="checkbox"/>	Policies governing any Section 8 Homeownership program check here if included in the Section 8 Administrative Plan			Annual Plan: Homeownership
<input checked="" type="checkbox"/>	Any cooperative agreement between the PHA and the TANF agency			Annual Plan: Community Service & Self-Sufficiency
<input checked="" type="checkbox"/>	FSS Action Plan/s for public housing and/or Section 8			Annual Plan: Community Service & Self-Sufficiency
<input checked="" type="checkbox"/>	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports			Annual Plan: Community Service & Self-Sufficiency
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U. S.C. 1437c(h)), the results of that audit and the PHA's response to any findings			Annual Plan: Annual Audit
N/A	Troubled PHA's: MOA/Recovery Plan			Troubled PHA's
<input checked="" type="checkbox"/>	Community Service Plan			Annual Plan
<input checked="" type="checkbox"/>	Pet Policy			Annual Plan
<input checked="" type="checkbox"/>	Plan of Correction for the Resident Assessment Survey System			Annual Plan
N/A	Other supporting documents (optional) (list individually; use as many lines as necessary)			(specify as needed)

# 1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

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.

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

Housing Needs of Families in the Jurisdiction by Family Type <i>(CITY OF ORLANDO)</i>							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size	Location
Income <= 30% of AMI	6350	5	4	4	1	2	3
Income >30% but <=50% of AMI	5088	5	4	4	1	2	3
Income >50% but <80% of AMI	9,909	3	3	3	1	2	3
Elderly	9,342	3	3	1	2	1	1
Families with Disabilities <i>(based on 3% of lower income population)</i>	343	3	3	1	3	1	1
Race/Ethnicity <b><i>ELI and VLI (Black Non-Hispanic)</i></b>	4505	5	4	4	1	2	3
Race/Ethnicity <b><i>ELI and VLI (Hispanic -All Races)</i></b>	1669	5	4	4	1	3	3

Housing Needs of Families in the Jurisdiction by Family Type (ORANGE COUNTY)							
Family Type	Overall	Affordability	Supply	Quality	Accessibility	Size Size Size	Location
Income <= 30% of AMI	21,629	5	4	4	1	3	3
Income >30% but <=50% of AMI	21,736	5	4	4	1	2	3
Income >50% but <80% of AMI	35,567	3	3	3	1	2	2
Elderly	11,682	2	2	1	2	1	1
Families with Disabilities (based on 3% of lower income population)	1301	4	3	2	3	1	2
Race/Ethnicity <u>ELI and VLI</u> (Black Non-Hispanic)		5	4	4	1	2	3
Race/Ethnicity <u>ELI and VLI</u> (Hispanic -All Races)		5	4	4	1	3	3

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction/s  
*City of Orlando Year: 2000 -2005*  
*Orange County Year: 2000 -2003*
- U.S. Census data: the Comprehensive Housing Affordability Strategy (“CHAS”) data set
- 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.

<b>Housing Needs of Families on the Waiting List</b>			
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/sub-jurisdiction:			
	# of families	% of total families	Annual Turnover
		90	
Waiting list total	3673		276
Extremely low income <=30% AMI	3307	90.04	
Very low income (>30% but <=50% AMI)	254	6.92	
Low income (>50% but <80% AMI)	95	2.59	
Families with children	2354	64.09	
Elderly families	294	8.00	
Families with Disabilities	853	23.22	
Race/ethnicity (White Hispanic)	252	6.86	
Race/ethnicity (Black Hispanic)	43	1.17	
Race/ethnicity (White Non-Hispanic)	270	7.35	
Race/ethnicity (Black Non-Hispanic)	2141	58.29	
Race/ethnicity (Asian)	11	.30	

<b>Characteristics by Bedroom Size (Public Housing Only)</b>			
0-BDR	1,030	28.04	77
1BDR	122	3.32%	9
2-BDR	1,404	38.22%	105
3-BDR	926	25.21%	70
4-BDR	168	4.57%	13
5-BDR	18	.49%	1
6-BDR	5	.14%	1

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Is the waiting list closed (select one)? No  Yes  If yes:  
 How long has it been closed (# of months)? 10 months (March 2001)  
 Does the PHA expect to reopen the list in the PHA Plan year?  No  Yes  
 Does the PHA permit specific categories of families onto the waiting list even if generally closed? No  Yes

### Housing Needs of Families on the Waiting List

Waiting list type: (select one)  
 Section 8 tenant-based assistance  
 Public Housing  
 Combined Section 8 and Public Housing  
 Public Housing Site-Based or sub-jurisdictional waiting list (optional)  
 If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	4294		
Extremely low income <=30% AMI	3642	84.82%	
Very low income (>30% but <=50% AMI)	447	10.41%	
Low income (>50% but <80% AMI)	187	4.35%	
Families with children	2491	58.01%	
Elderly families	315	7.34%	
Families with Disabilities	946	22.03%	
Race/ethnicity (White Hispanic)	555	12.93%	
Race/ethnicity (Black Hispanic)	90	2.10%	
Race/ethnicity (White Non-Hispanic)	275	6.40%	
Race/ethnicity (Black Non-Hispanic)	2503	58.29%	
Race/ethnicity (Asian)	13	.30%	

Characteristics by Bedroom Size			
0-1BR	1635	38.07%	
2 BR	1330	30.97%	
3 BR	1058	24.64%	
4 BR	219	5.10%	
5BR	26	.61%	
6 BR	4	.09%	
<b><u>TOTAL</u></b>	<b><u>4294</u></b>		

Is the waiting list closed (select one)? No  Yes  If yes:  
 How long has it been closed (# of months) **26 Months (November 1999)**  
 Does the PHA expect to reopen the list in the PHA Plan year No  Yes   
 Does the PHA permit specific categories of families onto the waiting list even if generally closed? No  Yes  **Family Unification Program**

### 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

**This activity is part of effort to achieve de-concentration and housing choice goals.**

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

**The OHA is a member of the Orlando Consolidated Planning Committee and Orange County Consolidated Planning Committee. Our organization provides input to both the City and County Consolidated planning process through participation in the planning meetings and by providing housing statistics relating the demand for and supply of public housing and Section 8 assistance.**

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) **(See OHA Goals and Objectives)**

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

Select all that apply

**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**

Select all that apply

**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)

Select all that apply

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

**Strategy 1: Target available assistance to the elderly:**

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

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

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

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 **The OHA has longstanding relationships with such local agencies. Through regular meetings with these groups and the regular exchange of information, the need for and availability of housing resources for families with disabilities is made known.**
- Other: (list below) **The OHA plans to increase the supply of accessible, affordable housing through housing development initiatives. Plan Year Three activities will expand on building partnerships and planning for new initiatives and actual development of HUD approved HOPE VI revitalization programs. OHA will issue \$30 million in general purpose bonds to fund affordable housing initiatives in Year Three.**

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

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

Select if applicable

- Affirmatively market to races/ethnicities shown to have disproportionate housing needs
- Other: (list below) **See OHA goals and objectives for ensuring equal housing opportunity. The current information network provides adequate information to racial and ethnic groups with disproportionate housing needs. The OHA effort will be geared toward broader acceptance of affordable housing in diverse areas of the county, especially in non-impacted areas.**

**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  
**See OHA goals and objectives for ensuring equal housing opportunity.**
- Market the section 8 program to owners outside of areas of poverty /minority concentrations  
**See OHA goals and objectives for ensuring equal housing opportunity.**
- Other: (list below)  
**See OHA goals and objectives for ensuring equal housing opportunity.**

**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)

**The above strategies were also selected because: (1) they are consistent with the OHA Mission Statement; (2) they are consistent with the assessment of the capabilities of the OHA; (3) they take maximum advantage of the local opportunities for housing development; and (4) they have the potential for maximizing use of available funding sources.**

# OHA STATEMENT OF GOALS, OBJECTIVES AND YEAR 3 ACTIVITIES

**HUD Strategic Goal: Increase the availability of decent, safe and affordable housing in American Communities**

## Planning Area I - Related Goals of the OHA

### 1. Develop the capacity to develop and operate a range of housing programs.

Objective	Activity
Identify and acquire the resources to operate the non-profit subsidiary.	Establish budget for next two years of operation
	Evaluate and allocate internal sources of funding
	Develop funding proposals for external sources
Recruit/Hire/Select staff to plan and manage the activities of the subsidiary corporation.	Recruit and evaluate candidates
	Select and hire staff
Develop a long-range plan for housing development, identifying the type, probable location, potential partners and required resources	Identify strategic partners for housing planning and development
	Consult with potential partners to determine basic approach to housing development
	Identify and investigate financing vehicles available for housing development
	Identify areas to be targeted for development
	Draft long range development plan

### 2. Produce 100 incremental units of quality, affordable mixed-income housing for rental by lower to moderate-income individuals and families, and to replace housing lost through

**conversion, demolition, and disposition.**

Objective	Activity
Form strategic alliances and partnerships with for-profit and non-profit developers of affordable housing	Identify potential partners for housing development
	Enter discussions to determine roles of partners
	Formalize relationships through MOUs/MOAs
Develop resources and incentives for development of affordable housing, and advocate for set-asides of Tax Credit allocations for public/private housing development.	Identify impediments to affordable housing development
	Identify and evaluate applicability of development incentives that have been used successfully in Florida and elsewhere
	In cooperation with FAHRO, petition for Tax Credit set-asides for mixed finance projects
	In partnership with the Affordable Housing Roundtable, develop resources to “incentives” affordable housing development

**3. Develop 10 affordable units for ownership by lower-income families.**

Objective	Activity
Enter into a formal partnership with non-profit sponsors of affordable home ownership.	Identify potential partners for housing development
	Enter discussions to determine roles of partners
	Formalize relationships through MOAs/MOUs
Evaluate a lease-purchase model that can be effectively implemented under prevailing conditions.	Determine parameters and performance expectations for homeownership program
	Examine applicability of existing Homeownership programs

	Design lease-purchase mechanism that achieves program parameters
	Determine the forms of housing to be used in the program

**1. Preserve the affordable nature of subsidized housing complexes that are currently at risk from expired/expiring restrictions for use as low-income housing.**

Objective	Activity
Create mechanism within OHA to collect and analyze expiring-use information and use this information to respond to expiring use issues.	Assign and/or identify a department or agency with responsibility for preservation activities
	Establish information linkages with HUD and other sources of expiring use information
	Develop parameters for project evaluation and intervention
	Evaluate preservation opportunities for near term use-restriction expirations
Establish or participate in a forum of community partners to develop strategies and identify resources to acquire, control or otherwise prevent properties from losing their low-income nature.	Attend meetings and review near term expirations
	Review near term expirations, select properties for intervention
	Develop preservation strategy for selected properties
Utilizing formal partnerships with owners and/or for-profit and/or non-profit redevelopers of “at-risk” properties, gain control for the development and/or operation these properties as low-income housing.	Identify and select development partners
	Define roles of partners through negotiation

	Draft and execute MOUs/MOAs
	Enter into negotiations with Owners and HUD to develop offers for acquisition or control of properties
	Acquire control of properties

**HUD Strategic Goal: Ensure equal opportunity in housing for all Americans**

**Planning Area II - Related Goals of the OHA**

**1. Achieve geographic diversity with the placement of 80% of new affordable units in areas with income levels above 50% of area median.**

<b>Objective</b>	<b>Activity</b>
Implement a marketing and public information program to increase public and corporate awareness and acceptance of the need for affordable housing in all	Designate the person(s) within the agency tasked with the primary responsibility for developing and carrying out public relations and public information activities.
	Identify the primary corporate and public targets for awareness enhancement.
	Develop general procedures and case-specific strategies and action plans for providing information related to the various aspects of ongoing and planned OHA housing and service activities.
Expand the OHA’s role in the Affordable Housing Roundtable to that of key agent for the provision/creation of affordable housing in diverse areas of the county.	Attend Non-Profit Housing Roundtable Meetings. Make periodic presentations to update members on status of OHA affordable housing efforts and partnership opportunities
Develop “housing-support” partnerships with major corporations whose employees need conveniently located affordable housing.	Identify key corporations with which partnerships may be feasible
	Determine the affordable housing attitudes and objectives of these corporations

	Select those corporations which would most likely advance the cause of affordable housing
	Develop a joint housing advocacy and public relations plan with these corporations
	Offer OHA services as development agent

**1. Increase the percentage of all Section 8 mover families with children who moved to low-poverty census tracts to 2 % points higher than the percentage of Section 8 families with children residing in low poverty census tracts at the end of FY 2000.**

Objective	Activity
Identify the areas of the county to be targeted for enhanced program marketing.	Identify census tracts with incomes above 50% of median
	Determine housing availability in those identified tracts
	Identify those selected census tracts with adequate availability of rental housing as targets for marketing
Develop partnership with service agency to help ease the family's transition to occupancy in non-traditional areas.	Identify agencies and organizations providing services in the targeted areas that can perform the required services
	Meet with identified agencies to enlist their support and assistance
	Enter into formal agreements with partnering entities
	Provide appropriate information and administrative support for partners providing the transition assistance
Develop and utilize revised orientation program for voucher-holders to emphasize their option to occupy units in non-impacted areas.	Identify additional information to be included in briefing and orientation program
	Review and revise, if necessary, the format of the briefing
	Train staff on the use of new briefing materials

Objective	Activity
	Incorporate revised materials and presentation into briefings and orientations
Develop and implement landlord outreach and orientation program to attract owners of units in targeted areas.	Evaluate effectiveness of existing landlord outreach efforts and identify opportunities for improvement
	Convene focus group of selected owners to identify obstacles to and strategies for outreach
	Revise information for owners and develop outreach plan
	Distribute/disseminate information to owners of properties in the targeted areas

### 1. Achieve mandatory income mixes in Public Housing

Objective	Activity
Identify properties for which de-concentration targets are to be established.	Monitor income mix of properties
	Compare property-specific income mix with income characteristics of neighborhood
	Identify properties whose income mix is considerably different than that of neighborhood
Modify and implement admissions and unit assignment policies to facilitate income mixing in applicable housing developments.	Change ACOP to include preference for families whose adult members are enrolled currently in educational, training, or upward mobility programs
	Change ACOP to include preference for households that contribute to meeting income goals (broad range of incomes)
	Change ACOP to allow for income-skipping to achieve more appropriate income mix in targeted developments

Objective	Activity
Develop and implement rent incentives to attract and retain higher-income residents, and to encourage existing residents to work and increase incomes.	Update flat rents
	Revise ACOP to liberalize reporting requirements for increased income
	Revise transfer policy to encourage higher income residents to move to targeted properties with disproportionate number of lower income residents
Develop and implement property (physical) incentives to attract and retain higher-income residents.	Identify and schedule additional improvements needed to make properties competitive with the market
	Continue current modernization efforts and complete required physical improvements
Develop and implement a marketing program to broaden the characteristics of persons on the waiting list.	Select targets for marketing
	Develop marketing strategy to reach target groups
	Develop marketing materials (brochures, public service announcements, ads)
	Initiate marketing effort

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

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**Planning Area III - Related Goals of the OHA**

- 1. Achieve employment of at least one non-elderly/non-disabled adult family member in 20% of unemployed Public Housing households not already engaged in an employment activity.**

Objective	Activity
Develop and implement tenant-selection policies that place a priority on occupancy by families with members who are working, going to school or who are in job training programs.	Change ACOP to include preference for families whose adult members are enrolled currently in educational, training, or upward mobility programs
Develop and implement rent determination and program policies that provide work incentives.	Continue to implement flat rents
	Liberalize income reporting requirements
	Create policy that uses homeownership option as an incentive for work
Working in partnership with job training, education, and supportive service agencies, facilitate activities that enhance the employability of adults living in non-working households.	In cooperation with service partners, assess employability of existing residents
	Evaluate potential and actual effectiveness of existing programs in light of needs of residents
	Determine if any program modifications or additional services are needed
	Modify partnership agreements, service agreements and/or programs to increase level of success
Working in partnership with job training, education, and supportive service agencies, facilitate job placement and employment of adults living in non-working households	In cooperation with service partners, assess skills of existing residents
	Identify families that are ready for job placement
	Refer these identified families to the appropriate job placement agency or service partners

**2. Increase current rate of employment among adult Section 8 beneficiaries by 2%.**

Objective	Activity
Develop and implement tenant-selection policies that place a priority on occupancy by families with members who are working, going to school or who are in job training programs.	Modify ACOP
Revise and implement an enhanced program marketing effort to achieve full utilization of all FSS slots.	Institute a campaign to provide potential Section 8 participants with information regarding the FSS program, its services and benefits
Create and implement incentives to encourage participants to complete their participation in FSS.	Evaluate the related supportive services in light of the needs expressed by current and potential participants
	Revamp or expand services, if needed, to address those needs
	Establish personal achievement recognition awards and publicity for program completion
Strengthen existing and create new partnerships for the continued implementation of the Family Self-Sufficiency Program.	Evaluate potential and actual effectiveness of existing programs in light of needs of residents
	Determine if any program modifications or additional services are needed
	Modify partnership agreements, service agreements and/or programs to increase level of success

**3. Enable 3 beneficiaries of tenant-based assistance to become homeowners.**

Objective	Activity
Develop a plan for implementation of the homeownership provisions of the Section 8 program.	Continue to review regulations regarding implementation of Section 8 Homeownership provisions

Objective	Activity
	Revise program policies as necessary
	Revise procedures for program administration, if necessary
Establish and implement mechanisms to identify Section 8 homeownership candidates.	Identify families who meet basic program eligibility guidelines
	Poll identified families to determine their level of interest in ownership
	Evaluate home buying potential of interested families
	Select families for participation in homeownership track
Continue partnerships with organizations that provide homebuyer training and counseling and facilitate the provision of these services to homeownership candidates.	Monitor agreement with identified organization to prepare participants for ownership
	Refer selected families to the services provided by the partners
	Track the progress of the participants

**4. Enable 2 public housing families to achieve home ownership.**

Objective	Activity
Establish and implement mechanisms to identify public housing homeownership candidates.	Identify families who meet basic program eligibility guidelines
	Poll identified families to determine their level of interest in ownership
	Evaluate home buying potential of interested families

Objective	Activity
	Select families for participation in homeownership track
Enter into partnerships with organizations that provide homebuyer training and counseling and facilitate the provision of these services to homeownership candidates.	Identify organizations that provide homebuyer training and counseling
	Enter into formal agreement with identified organizations to prepare participants for ownership
Enroll successful candidates into the homeownership track.	Establish case management mechanism for selected families
	Execute program participation agreements with selected families
	Refer selected families to the services provided by the partners
	Track the progress of the participants
Establish and implement financial assistance mechanisms ( Emergency Assistance Fund to for assist eligible families with verifiable household emergencies)	Determine levels of affordability based on likely participants' financial characteristics
	Identify potential funding sources for down payment assistance, mortgage write-downs, and credit enhancements

**5. Facilitate the development and operation of 1 additional resident-owned business.**

Objective	Activity
Identify agencies and organizations with expertise and resources to provide resident entrepreneurial training.	Contact local entities that specialize in training, technical assistance and financial assistance for small business development
	Determine their level of interest and ability to work with OHA residents to develop their businesses

Objective	Activity
	Enter into agreements with those which are likely to be most successful in helping residents start businesses
Assist partners in the identification and recruitment of interested residents to participate in entrepreneurial training.	Conduct outreach to identify interested residents
	Conduct interviews of interested residents to determine areas of interest, degree of interest, and existing business-related skills and abilities
	Select residents to participate in entrepreneurial training and technical assistance
In partnership with the identified entities, develop/expand training program.	Evaluate current training and T/A program in light of residents' interests and abilities
	If necessary, develop or modify training plan to match residents' interests and abilities
	Prepare and execute personalized training and technical assistance plans for participants
Facilitate the provision of start-up technical assistance and financing to 5 new resident-owned businesses.	Appoint business development coordinator
	Establish mechanism for monitoring business development activity
	Select resident businesses to receive T/A and financial assistance

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**HUD Strategic Goal: Improve quality of life and economic viability**

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**Planning Area IV - Related Goals of the OHA**

**1. Achieve a 15% higher level of satisfaction among residents of neighborhoods containing**

**distressed public housing.**

Objective	Activity
Conduct strategic asset analysis of all OHA properties	Prepare RFP for consultant to perform analysis
	Issue RFP and select consultant
	Conduct analysis and evaluate conclusions
	Develop strategic asset management plan for the properties based on the recommendations of the consultant

**2. Increase the economic viability of the OHA by reducing the need for HUD funding by 2%.**

Objective	Activity
Reduce OHA per service unit expenditures by 5% (adjusted for inflation) over the next 5 years by achieving economies through improvements in efficiency, reduction in utility consumption, and cost controls.	Implement recognition program for employee-generated ideas resulting in savings
	Evaluate all facets of OHA operations and eliminate duplication and contract functions that can be more efficiently performed by outside entities
	Develop objective measures of employee productivity and tie these measures to performance evaluations
Increase internally generated rental income by 25% over the next 5 years through changes in admissions policies and facilitation of employment and training programs.	Increase the number of higher rent paying residents in occupancy by 5% per year (See Goals II C and III A)
	Increase the average amount of rent charged by increasing the incomes of families in residence (See Goals II C and III A)
Identify and secure alternative funding sources for self-sufficiency programs.	Develop priority list of services for which outside funding is required or desired

Objective	Activity
	Investigate and evaluate the potential funding opportunities from non-HUD governmental agencies
	Investigate and evaluate the potential funding opportunities provided by private foundations and corporations
	Prepare applications for funding.

**3. Improve the physical condition of existing OHA-owned or OHA-managed housing units to achieve rent comparability with standard quality housing in the local private housing market.**

Objective	Activity
Conduct strategic asset analysis of all OHA properties	Prepare RFP for consultant to perform analysis
	Issue RFP and select consultant
	Conduct analysis and evaluate conclusions
	Develop strategic asset management plan for the properties based on the recommendations of the consultant
Adopt consultant's recommendations for improving property's competitive position.	Identify recommendations that are consistent with strategic asset decisions and market comparability
	Incorporate the selected improvements into existing modernization budgets and activities
Prepare a multi-year capital improvement plan.	Establish schedule of resident consultation
	In consultation with residents and local stakeholders, establish physical improvement priorities
	Draft capital improvement plan in the appropriate format
	Identify and secure sources of funding for improvements

**1. Increase by 10% the number of local residents with a favorable image of the OHA and its program beneficiaries.**

Objective	Activity
Conduct a survey of public perception to establish baseline and to identify opportunities for improvement.	Develop public perception survey instrument and methodology
	Conduct public perception survey, tabulate and evaluate survey results
Identify the primary targets for awareness enhancement and perception modification.	In consultation with members of Housing Task Force
	Determine current perceptions, knowledge and attitudes regarding affordable housing
Develop general procedures and case-specific strategies and action plans for providing information related to the various aspects of ongoing and planned OHA housing and service activities.	Review existing public relations and public information mechanisms and determine their applicability to current objectives
	Develop public relations and information policy
	Identify the programs and activities requiring a revised approach to PR and PI
	Develop public relations and information plan for identified activities and programs
Establish and utilize mechanisms to publicize success stories of OHA and its residents.	Develop a theme that can impact public perceptions
	Create mechanism to identify OHA human interest stories
	Establish relationship with local media to obtain commitment to publicize successes

Objective	Activity
Identify, secure and allocate financial and in-kind resources to support public information effort.	Develop PR and information budget
	Identify and allocate sources of funds for anticipated expenses
	Identify sources of in-kind services and obtain commitments
Develop and publicize web site containing pertinent information regarding the activities and programs of the OHA.	Establish PR and information objectives
	Determine information required and format for that information
	Secure services of web site designer and update web site

**5. Increase effective resident involvement in improvement initiatives**

Objective	Activity
Increase effectiveness of resident organizations by assisting 3 Resident Councils to obtain 501(c)(3) designation.	Identify incorporated Resident Associations that are fully functional and interested in engaging in resident initiatives
	Secure resources to provide the technical assistance required to prepare IRS documents
	Facilitate the provision of technical assistance and filing of IRS documents requesting tax-exempt status
Continue program-marketing initiatives to increase participation in resident initiatives by 10%.	Convene working group of tenants and staff to identify obstacles to greater tenant participation and to develop strategies for achieving greater participation
	Review OHA newsletter and identify improvements that would make it a more effective communication tool

Objective	Activity
	Develop incentives and rewards for resident participation
Increase resident involvement in OHA planning and operations by establishing formal mechanisms for input and incentives for participation.	Review existing MOU's with resident organizations and revise them to strengthen resident participation components
	Conduct an annual resident satisfaction survey, providing opportunity for resident response and input into variety of operational and policy issues
Increase the opportunity for OHA staff participation in resident council meetings by instituting a policy requiring the attendance of a key member of staff upon invitation by the RC.	Appoint staff liaisons to each Resident Association
	Develop calendar of Resident Council meetings
	Develop procedure for RC to request staff attendance and for RC to be notified of staff designated to attend

**6. Increase the ability of the OHA to provide quality services by improving employee performance, productivity and customer service.**

Objective	Activity
Increase employee job knowledge and skill levels by completing a comprehensive training program.	Assess current staff proficiencies in key areas of program management and administration
	Develop comprehensive training plan
	Identify and allocate resources required for implementation of training plan
	Establish system for monitoring employee training

Objective	Activity
<p>Demonstrate clear lines of accountability by linking job performance to objective measures as defined in HUD monitoring programs and the objectives of OHA Agency and Annual Plan, Strategic Plan, management improvement plans, and customer service requirements.</p>	<p>Review responsibilities and performance measures light of the mission, goals and objectives of the OHA</p>
	<p>Distribute work assignments to achieve greater organizational efficiency and effectiveness</p>
<p>Maintain the CCS automated management information system hardware and software to state-of-the-industry standards and train employees in the use of the system.</p>	<p>Review performance of system against the automated information management needs of the agency and recommend improvements</p>
	<p>Identify and secure resources required to improve automated systems</p>
	<p>Train staff to fully utilize automated systems</p>
<p>Boost employee morale by developing and implementing systems for appreciation and recognition of exemplary employees.</p>	<p>Select staff to form focus group</p>
	<p>Generate list of recommendations for employee recognition and reward</p>
	<p>Select recognition and reward mechanisms</p>
	<p>Commit the resources to support the rewards</p>
<p>Improve work environment by consolidating central office in a quality facility and upgrading satellite offices.</p>	<p>Re-evaluate requirements for office</p>
	<p>Investigate availability and cost of existing office space (with consideration for renovation and accommodating future needs)</p>
	<p>Investigate availability and cost of land for construction</p>
	<p>Select the most appropriate alternative and develop plan to acquire/develop office space</p>
	<p>Secure the resources to execute office plan</p>

Objective	Activity
	Undertake acquisition/development activities
Increase level of cooperation and teamwork through mechanisms that facilitate the timely flow of quality information and the collaborative planning of agency operations.	Create quality circles to deal with the issues of occupancy, physical conditions, and personnel
	Create employee newsletter to keep staff informed of major issues affecting the OHA
	Create committee, composed of staff from all levels, to review progress on the PHA plan and strategic plan
	Prepare quarterly reports for each of the quality circles and distribute to staff

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

[24 CFR Part 903.7 9 (b)]

<b>Financial Resources: Planned Sources and Uses</b>		
Sources	Planned \$	Planned Uses
<b>1. Federal Grants (FY 2001 grants)*</b>		
a) Public Housing Operating Fund	2,597,498	Public Housing Operations
b) Public Housing Capital Fund	3,495,257	Capital Improvements
c) Public Housing Replacement Reserve	500,337	
d) HOPE VI	6,800,000	Homes, elderly units
e) HOPE VI Demolition	--	
f) Annual Contributions for Section 8 Housing Choice Vouchers	12,405,041	HAP, Admin. fee
g) Single Room Occupancy (SRO)	364,018	HAP, Admin. fee
h) Public Housing Drug Elimination Program (PHDEP #8,9,10)	1,230,424	Public Housing Safety
i) Resident Opportunity and Self-Sufficiency (ROSS)	200,000	Resident Self-Sufficiency
j) Community Development Block Grant	62,500	Anticipated for Lake Mann
k) Comprehensive Grant (707, 708)	6,952,937	Capital Improvements
<b>2. Other Federal Grants (List Below)</b>		
a) TOP (Lake Mann RA, 100,000; Ivey Lane RA, 40,000; Omega RA, 40,000)	180,000	Resident Self-Sufficiency
b) Economic Development & Economic Self-Sufficiency	401,750	Supportive Services and Self-

(EDSS)		Sufficiency
<b>3. Public Housing Dwelling Rental Income</b>	<b>1,458,528</b>	Rent Collection
<b>4. Other Income (List below)</b>		
Interest and Other Income (Fraud, investments, other income)**	5,611,203	Public Housing Operations/Section 8, Hope VI program income
Farmer's Home Administration (rental assistance for Hawthorne Village)		Affordable Housing Operations
5. Non-Federal Sources (List Below)		
<b>TOTAL RESOURCES</b>	<b>42,259,493</b>	

\* Based on FY 2000-2001 Actuals Received by OHA

\*\* Includes program income from land sales at Hampton Park

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

[24 CFR Part 903.7 9 (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)
- OHA verifies eligibility for admission when family is within 30 days of being offered housing.**
- 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)

**OHA also uses credit history as a screening factor.**

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)

**All applicants are subjected to local, state and federal criminal background checks.**

**(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)

**The OHA is developing a site based waiting list for its family property in Apopka, Florida (Marden Meadows) and its HOPE VI property in Orlando (Hampton Park). This design may include a beta test (with HUD's approval).**

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

**As noted above, in Plan Year Three, the OHA will design a site based waiting list for its family property in Apopka, Florida (Marden Meadow) and its HOPE VI property in Orlando (Hampton Park). This design may include a beta test (with HUD's approval).**

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?

**As noted above, this design may include a beta test (with HUD's approval)**

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

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)

**To be designed this year.**

**(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  
**Families may receive a hardship exemption if they reject a unit for sufficient cause or if they reject a unit offered as an deconcentration effort**

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? *However, as a practical matter, it will probably exceed the target.*

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) **Modernization and Witness Protection (when requested by an official law enforcement agency).**

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 program
- 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 )
  - For applicants choosing Low Rent Public Housing only, involuntary displacement which is not under the applicant's control
  - Working households as currently defined in OHA's Section 8 Housing Choice Voucher Homeownership program and those unable to work because of age or disability
  - Graduates of Transitional Housing programs
  - Former Public Housing or Section 8 Voucher participant who has acquired a home, has met the requirements of the OHA Homeownership program (including Homeownership Training) and has lost that home due to insufficient income.

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.

### 3 Date and Time

#### Former Federal preferences:

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs

- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)

- 1 For applicants choosing Low Rent Public Housing only, involuntary displacement which is not under the applicant's control
- 2 Working households with children (elderly or non-elderly) as currently defined in OHA's Section 8 Housing Choice Voucher Homeownership program with six months of continuous employment and those unable to work because of age or disability.
- 2 Graduates of Transitional Housing programs
- 2 Former Public Housing or Section 8 Voucher tenant who has acquired a home, has met the requirements of the OHA Homeownership program (including Homeownership Training) and has lost that home due to insufficient income.

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)
  - Manager's orientation with new residents**
  - New resident checklist**
  - Resident handbook**

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

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

**(6) De-concentration and Income Mixing**

See Attachment A.

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 de-concentration 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 de-concentration 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 de-concentration 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 de-concentration 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 de-concentration 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

**(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  
**The Section 8 program uses the same screening criteria and procedures as is used with public housing applicants.**
  - 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  
**This information is provided upon the request of the owner. Owners are encouraged to perform their own criminal records check on prospective renters.**
  - 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:

**For hardships (as defined in the Administrative Plan) and for hard-to-house families.**

**(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?

*However this may occur due to the income of applicants*

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

- Verified disabled families
- For applicants choosing Vouchers only, involuntary displacement due to domestic violence which is independently verified. This does not apply to those currently housed in OHA properties.
- Working households with children (elderly or non-elderly) as currently defined in OHA's Section 8 Housing Choice Voucher Homeownership program and those unable to work because of age or disability
- Graduates of Transitional Housing programs
- Former Public Housing or Section 8 Voucher tenant who has acquired a home, has met the requirements of the OHA Homeownership program (including Homeownership Training) and has lost that home due to insufficient income.

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.

### 3 Date and Time

#### Former Federal preferences:

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- Victims of domestic violence
- Substandard housing
- Homelessness
- High rent burden
- Other preferences (select all that apply)
  - Working families and those unable to work because of age or disability
  - Veterans and veterans' families
  - Residents who live and/or work in the jurisdiction
  - Those enrolled currently in educational, training, or upward mobility programs
  - Households that contribute to meeting income goals (broad range of incomes)
  - Households that contribute to meeting income requirements (targeting)
  - Those previously enrolled in educational, training, or upward mobility programs
  - Victims of reprisals or hate crimes
  - Other preference(s) (list below)
    - 1** Verified disabled families
    - 1** For applicants choosing Vouchers only, involuntary displacement due to domestic violence which is independently verified. This does not apply to those currently housed in OHA properties.
    - 2** Working households with children (elderly or non-elderly) as currently defined in OHA's Section 8 Housing Choice Voucher Homeownership program

- program and those unable to work because of age or disability.
- 2 Graduates of Transitional Housing programs
- 2 Former Public Housing or Section 8 Voucher tenant who has acquired a home, has met the requirements of the OHA Homeownership program (including Homeownership Training) and has lost that home due to insufficient income.

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)

**The OHA operates two special purpose Section 8 programs. They are: (1) Mainstream for Persons with Disabilities; and (2) Family Unification.**

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

- Through published notices
- Other (list below)

**Program availability is communicated directly to agencies serving the special needs populations. Information is provided to these organizations on a regular basis and any changes in program requirements or availability of additional units of assistance are**

*communicated immediately. Family Unification Program applicants must be referred directly through the State of Florida Department of Children and Families. They also apply initially through the Family Services Department of the OHA and are then referred to the Admissions and Occupancy Department for processing.*

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

[24 CFR Part 903.7 9 (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**

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

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

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

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

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

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

- For the earned income of a previously unemployed household member
- For increases in earned income
- Fixed amount (other than general rent-setting policy)

**If yes, state amount/s and circumstances below:**

- Fixed percentage (other than general rent-setting policy)

**If yes, state percentage/s and circumstances below:**

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

e. Ceiling rents

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

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

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

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

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

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

f. Rent re-determinations:

1. Between income re-examinations, 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)

### *Analysis of amenities for each complex and surrounding market rate complexes*

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

Describe the voucher payment standards and policies.

### **(1) Payment Standards**

a. What is the PHA's payment standard? (select the category that best describes your standard)

- At or above 90% but below 100% of FMR
- 100% of FMR
- Above 100% but at or below 110% of FMR
- Above 110% of FMR (if HUD approved; describe circumstances below)

b. If the payment standard is lower than FMR, why has the PHA selected this standard? (select all that apply)

- FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area
- The PHA has chosen to serve additional families by lowering the payment standard
- Reflects market or submarket
- Other (list below)

c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply)

- FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area
- Reflects market or submarket
- To increase housing options for families
- Other (list below)

d. How often are payment standards reevaluated for adequacy? (select one)

- Annually
- Other (list below)

***Biannually***

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)

***Location***

## **(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)

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)

## **5. Operations and Management**

[24 CFR Part 903.7 9 (e)]

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

(Select one)

- An organization chart showing the PHA's management structure and organization is attached.
- A brief description of the management structure and organization of the PHA follows:

The Executive Director reports to a Board of Commissioners. The Deputy Director reports to the Executive Director. Under the Executive Director, department heads manage the following

departments; Public Housing, Section 8, Planning and Development, MIS, Admissions and Occupancy, Maintenance/ Modernization, Family Services, Purchasing, Finance and Human Resources.

**B. HUD Programs Under PHA Management**

<b>Program Name</b>	<b>Units or Families Served at Year Beginning</b>	<b>Expected Turnover</b> <i>includes turnover and expected use of vacant units or unused assistance</i>
Public Housing	1607	276 <i>251 turnover; 25 vacant units leased</i>
Section 8 Vouchers	2,499	300
Section 8 Certificates	-----	-0-
Section 8 Mod Rehab	100	20
Special Purpose Section 8 Certificates/Vouchers (list individually)	Mainstream 100 Family Reunification 20 (included in the total above)	0 5
Public Housing Drug Elimination Program (PHDEP)	1525	N/A
Other Federal Programs(list individually)		
<b>EDSS</b>	Programs initiated in 2001.	TBD
<b>ROSS</b>	Data not yet available	TBD
<b><i>Farmer's Home Adm.</i></b>	84	8

**C. Management and Maintenance Policies**

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

**Management**

- a. *Admissions and Continued Occupancy Policy –*
- b. *Tenant Selection and Assignment Plan (included in ACOP)*
- c. *Grievance Procedures*
- d. *Tenant Handbook*
- e. *Management and Operations Procedure Manual*
- f. *Dwelling Lease and Addenda*
- g. *Tenant Briefing Checklist*

**Maintenance**

- a. *Maintenance Policy and Procedure Manual*
- b. *Dwelling Lease*
- c. *List of Resident Repair and Maintenance Charges*

*d. Operations and Procedures Manual*

(2) Section 8 Management: (list below)

*a. Section 8 Administrative Plan*

**6. PHA Grievance Procedures**

[24 CFR Part 903.7 9 (f)]

**A. Public Housing**

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

**If yes, list additions to federal requirements below:**

2. Which PHA office should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)
- PHA main administrative office
  - PHA development management offices
  - Other (list below)

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

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

**If yes, list additions to federal requirements below:**

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

**7. Capital Improvement Needs**

[24 CFR Part 903.7 9 (g)]

**A. Capital Fund Activities**

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

Select one:

- The Capital Fund Program Annual Statement is provided as an attachment to the PHA

Plan at **Attachment K**

-or-

The Capital Fund Program Annual Statement is provided below:

**(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 I

-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)

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

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

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

1. Development name: **Orange Villa** (now known as Hampton Park)

2. Development (project) number: **FL-04-07**

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:**

**Carver Court (FL-04-03)**

**Griffin Park (FL-04-01)**

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:**

**The OHA will be engaged in development activities pursuant to the approved and funded HOPE VI program (Orange Villa, now known as Hampton Park). This will be a mixed-finance redevelopment effort and will include public housing.**

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:

The OHA will be continuing its planning for an acquisition program of development using tax exempt bonds creating mixed income developments wherein 20% of the units are made available for occupancy by LRPB tenants. Such developments will be located in non-impacted areas of the County and City.

## **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.)

<b>Demolition/Disposition Activity Description</b>	
Development name:	<u><i>Carver Court</i></u>
1b. Development (project) number:	<u><i>FL-04-03</i></u>
2. Activity type	<input checked="" type="checkbox"/> Demolition <input checked="" type="checkbox"/> Disposition
3. Application status (select one)	Approved <input type="checkbox"/> Submitted, pending approval <input checked="" type="checkbox"/> Planned application
4. Date application approved, submitted, or planned for submission:	<u><i>30/July/2001</i></u>
5. Number of units affected:	<u><i>212</i></u>
Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity:	a. Actual or projected start date of activity: <i>07/30/01</i> b. Projected end date of activity: <u><i>28/February/2003</i></u>

<b>Demolition/Disposition Activity Description</b>	
Development name:	<u><i>Griffin Park</i></u>
1b. Development (project) number:	<u><i>FL-04-01</i></u>
2. Activity type	<input checked="" type="checkbox"/> Demolition <input checked="" type="checkbox"/> Disposition
3. Application status (select one)	Approved <input type="checkbox"/> Submitted, pending approval <input checked="" type="checkbox"/> Planned application
4. Date application approved, submitted, or planned for submission:	<u><i>February 2002</i></u>
5. Number of units affected:	<u><i>198</i></u>
Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity:	a. Actual or projected start date of activity: <u><i>February 2003</i></u> b. Projected end date of activity: <u><i>February 2004</i></u>

**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.

<b>Designation of Public Housing Activity Description</b>	
1a. Development name:	<u><i>Hampton Park (formerly known as Orange Villa)</i></u>
1b. Development (project) number:	<u><i>FL-04-07</i></u>
2. Designation type:	<input checked="" 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 checked="" 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:	<u><i>Approval Date: 09/07/99</i></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:	<u><i>48</i></u>
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)] See Attachment B

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

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

2. Activity Description

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

<b>Conversion of Public Housing Activity Description</b>
1a. Development name: 1b. Development (project) number:
2. What is the status of the required assessment? <input type="checkbox"/> Assessment underway <input type="checkbox"/> Assessment results submitted to HUD <input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question) 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>Conversion of Public Housing Activity Description</b>

<b>B. Reserved for Conversions pursuant to Section 22 of the U.S. Housing Act of 1937</b>
-------------------------------------------------------------------------------------------

<b>C. Reserved for Conversions pursuant to Section 33 of the U.S. Housing Act of 1937</b>
-------------------------------------------------------------------------------------------

## **11. Homeownership Programs Administered by the PHA**

[24 CFR Part 903.7 9 (k)]

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

### **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</b>	
1a. Development name:	<u>Hampton Park</u>
1b. Development (project) number:	<u>1997 HOPE VI Revitalization Project</u>
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) <input checked="" type="checkbox"/> <b><i>Nehemiah-type program created as part of the HOPE VI development program</i></b>
3. Application status: (select one)	<input checked="" 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:	<u>Approval Date:</u> <u>8/13/99</u>
5. Number of units affected:	<u>52</u>
6. Coverage of action: (select one)	<input checked="" type="checkbox"/> Part of the development <b><i>20 units for purchase by public housing/Section 8 residents will be constructed on site and 32 residents will be able to purchase units off-site. Suggestion: "for purchase by low income families with preference to former orange villa residents, public housing/Section 8 residents and persons on waiting lists for both programs.</i></b>
	<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:**

- 1.. Head and/or spouse must have been continually employed full-time during the prior 12 month period. Interruptions in employment up to 4 weeks are permitted.
2. Minimum family downpayment of \$1,000.
- 3.. Limited to FSS participants and others enrolled in any OHA or OHA approved homeownership program
4. All participants must complete a pre-purchase and post purchase counseling program.

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

[24 CFR Part 903.7 9 (l)]

*N/A (Section 432 of H.R. 2620 FY 2002 VA/HUD Appropriations Bill)*

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? 3/1/01

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

- Client referrals
- Information sharing regarding mutual clients (***for rent determinations ONLY***)
- 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. )

<b>- Economic and Social Self Services and Programs -</b>				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list, random selection, specific criteria, etc.)	Access (development office/PHA main office/other provider name)	Eligibility (public housing or section 8 participants or both)
<b>Family Self Sufficiency (FSS):</b> Case management & jobs development program w/supportive services	200 families	Specific Criteria	OHA Central Office enrollment	Section 8 participants
<b>Family Unification:</b> Case management, family counseling, and supportive services program	300 families	Section 8 waiting list and availability of a Family Unification Voucher	Recommendation from Dept. Of Children & Family Services	Section 8 applicants
<b>Resident Training and Development:</b> assessments (including academic, vocational, and case management - supportive services), skills based training, job counseling & job placement assistance	10	Open Participation	OHA Central Office, complex offices, and other social service agencies	Section 8 participants and public housing residents
<b>Summer Camp:</b> Youth				Public housing

**- Economic and Social Self Services and Programs -**

<b>Program Name &amp; Description (including location, if appropriate)</b>	<b>Estimated Size</b>	<b>Allocation Method (waiting list, random selection, specific criteria, etc.)</b>	<b>Access (development office/PHA main office/other provider name)</b>	<b>Eligibility (public housing or section 8 participants or both)</b>
services program	100	Random selection	Complex offices	youth
<b>Transportation Services:</b> OHA van service for programs; provide residents with bus passes for self- sufficiency and other services	200/yr	Specific criteria	Central office & complex offices	Public housing residents
<b>Food Bank:</b> Distribution of food and commodities	500/yr	Open participation	Complex offices; Resident Association participation	Public housing residents
<b>Small Business Development Training:</b> Business development training & support services	5/yr	Open participation	Central office	Section 8 participants and public housing residents
<b>Resident Activities and Services:</b> wide range of programs, activities, events intended to promote family unity and increase the quality of life for the elderly and disabled	1,000	Open Participation	Central office and Complex offices	Public housing families and Section 8 participants
<b>Community Learning &amp; Enrichment Centers:</b> Educational and tutoring programs/services; computer labs	100/yr	Open Enrollment	Central office and Complex Family Offices	Public housing residents
<b>Community Outreach Program:</b> Info. & Referral Services; Resident Assn. Capacity building	all families	Open enrollment	Complex offices & Resident Association offices	Public housing residents
<b>Voter awareness program,</b> including registration and education	300	Specific criteria	Central office and Complex Offices	Section 8 participants and public housing residents
<b>Homeownership Program</b>	10	Specific criteria	Central office and complex offices	Section 8 participants and public housing residents

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

a. Participation Description

<b>Family Self Sufficiency (FSS) Participation</b>		
<i>Program</i>	<i>Required Number of Participants (start of FY 2000 Estimate)</i>	<i>Actual Number of Participants (As of: DD/MM/YY)</i>
<b>Public Housing</b>	0	0
<b>Section 8</b>	183	76

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

**C. Welfare Benefit Reductions**

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)
- Adopting appropriate changes to the PHA’s public housing rent determination policies and train staff to carry out those policies
  - Informing residents of new policy on admission and reexamination
  - Actively notifying residents of new policy at times in addition to admission and reexamination.
  - Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
  - Establishing a protocol for exchange of information with all appropriate TANF agencies
  - Other: (list below)

**D. Community Service Requirement pursuant to section 12(c) of the U.S. Housing Act of 1937**

OHA has developed its Community Service Requirement pursuant to PIH Notice 2000-26 and has attached a summary as required in Attachment J.

**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 PHA's 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 use to determine the need for PHA actions to improve safety of residents (select all that apply).

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

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

**Griffin Park (FL 04-01)**  
**Carver Court (FL-04-03)**  
**Lake Mann Homes (FL-04-04)**  
**Marden Meadows (FL--4-11)**

**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  
**OHA contracts with the Orlando Police Department and the Orange County Sheriff's Department for additional patrols in its housing developments.**
- Crime Prevention Through Environmental Design  
**A number of improvements have been made including, but not limited to:**  
**Security Screens**  
**Security Fences**  
**Bars over Air Conditioning units**

**Improved site lighting**

- Activities targeted to at-risk youth, adults, or seniors
- Volunteer Resident Patrol/Block Watchers Program
- Other (describe below)

**There is a Weed and Seed program in the Parramore area of Orlando which encompasses Griffin Park (FL-04-01) and Carver Court (FL-04-03).**

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

**Griffin Park (FL 04-01)**  
**Carver Court (FL-04-03)**  
**Lake Mann Homes (FL-04-04)**  
**Marden Meadows (FL-04-11)**

**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)

**Griffin Park (FL 04-01)**  
**Carver Court (FL-04-03)**  
**Lake Mann Homes (FL-04-04)**  
**Marden Meadows (FL-04-11)**

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

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

*N/A (Section 432 of H.R. 2620 FY 2002 VA/HUD Appropriations Bill)*

- 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 2001 in this PHA Plan?
- Yes  No: This PHDEP Plan is an Attachment.

## **14. Pet Policy**

[24 CFR Part 903.7 9 (n)]

The OHA Pet Policy is to permit one pet per household but limited to a dog, cat, fishes or bird/s. Pets require specified inoculations, must meet size limitations, must be leashed when outdoors, must be spayed or neutered and must have insurance. No pets identified as dangerous by the City of Orlando or by Orange County can be kept. All pets not specified on a lease must be added to a lease and include a non-refundable deposit and other specific requirements. The policy is attached as **Attachment B**.

## **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)? *Audit will be submitted to HUD when it becomes available*

## **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)

**OHA will continue to make capital improvements to bring properties to a level of parity with the private market. (See Capital Improvement Plan that is an attachment to this Annual Plan.)**

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 G
  - 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 (See Attachment I)**

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.)

*Florida Statute 421 requires that seven (7) persons serve on the OHA Board of Commissioners, with at least one member being a resident of either public housing or a Section 8 participant. All members of the board, including the resident member, are appointed by the Mayor of the City of Orlando.*

*Prior to the expiration of the term of a current resident commissioner, the Mayor's Liaison to the board of commissioners will prepare a list of at least three (3) resident candidates based on nominations from bona-fide and duly recognized resident associations. The list will be presented to the Mayor for consideration as potential appointees to the Board of commissioners. It is understood that the appointing authority is under no obligation to appoint a resident commissioner from the list.*

*The candidates are nominated by residents and resident organizations. Nominees can be any Head of Household receiving assistance through OHA and living within the city limits of Orlando.*

*Representatives of all Resident Associations are eligible to nominate candidates for the resident commissioner.*

### 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 **and living within the city limits of Orlando**
- 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).

1A. Consolidated Plan jurisdiction:

**City of Orlando, Florida**

2A. 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)

- 1 Affordable housing preservation
- 2 Increasing supply of affordable housing
- 3 Upgrading existing housing stock
- 4 Provision of special needs housing
- 5 Improvements to public housing
- 6 De-concentration
- 7 Supportive services to help families achieve economic self-sufficiency and to transition from welfare to work

Other: (list below)

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

1B. Consolidated Plan jurisdiction:

**Orange County, Florida**

2B. 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)

1. Affordable housing preservation
2. Increasing supply of affordable housing
3. Upgrading existing housing stock
4. Provision of special needs housing
5. Improvements to public housing
6. De-concentration

7. Supportive services to help families achieve economic self-sufficiency and to transition from welfare to work

Other: (list below)

3. The Consolidated Plans of the jurisdiction support the PHA Plan with the following actions and commitments: (describe below)
  8. Expand rental housing opportunities for lower income persons by producing 100 affordable rental units over 5 years and adding 100 new certificates to HOME's tenant-based assistance program
  9. Promote public/private and non profit partnerships to produce affordable rental units and encourage the production of 5,000 units for lower income persons over 5 years
  10. Support regulatory initiatives that stimulate production of affordable housing
  11. Expand fair housing education and marketing efforts
  12. Support efforts to assist low income families to become responsible homeowners and tenants.

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

##### **1. OHA Progress in Meeting the Mission and Goals Described in the Agency Five Year Plan**

See Attachment A

##### **2. Basic Criteria used in Determining Substantial Deviation from its 5-Year Plan.**

The OHA has determined that a substantial deviation will only occur if a formal vote of the Board of Commissioners is required for any changes to the "Orlando Housing Authority 5-Year plan. The Strategic Plan is a part of that Plan.

##### **1. Basic Criteria used in Determining a Significant Amendment or Modification to its 5-Year Plan**

The OHA has determined that a significant amendment or modification will only occur if a formal vote of the Board of Commissioners is required for any changes to the "Orlando Housing Authority 5-Year Plan of the Agency.. The Strategic Plan is a product of that 5 - Year Plan. In addition, any decision to demolish or dispose of a development or to designate a development as elderly only or disabled only, which already require a hearing and Board approval process as well as HUD approval, will be considered a significant amendment or modification to the 5-Year Plan.

**ATTACHMENTS**



**Annual Statement/Performance and Evaluation**  
**Comprehensive Grant Program (CGP) Part II: Supporting**  
**Pages**

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

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA - Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
FL 4-2/5 Reeves Terrace 176 Units	Security Window Screens	1460	176 Units	\$0.00	\$0.00	\$0.00	\$0.00	Work Done in 707
	Exterior Painting of Second Story Bldgs.	1460	7 Buildings	\$0.00	\$16,270.50	\$16,270.50	\$16,270.50	Work Done in 707
	Resurface Parking	1450	Common Areas	\$0.00	\$0.00	\$0.00	\$0.00	
	Landscape	1450	Common Areas	\$25,000.00				
	Lead Abatement	1460	176 Units	\$20,000.00	\$3,021.86	\$3,021.86	\$3,021.86	
	Install Central HVAC as Prototype	1460		\$0.00	\$11,874.44	\$11,874.44	\$0.00	
Sub-Total				\$45,000.00	\$31,166.80	\$31,166.80	\$19,292.36	
FL 4-3 Carver Court	Security Fence	1450	1 Unit	\$125,000.00	\$24,153.00	\$24,153.00	\$0.00	
	Demolition of 35 Buildings	1485	35	\$0.00	\$589,300.00	\$589,300.00		
	Sub-Total				\$125,000.00	\$613,453.00	\$613,453.00	\$0.00
FL 4-4 Lake Mann Homes 210 Units	Re-Wire Exterior w/New Meters	1450	210 Units	\$250,000.00	\$85,114.11	\$85,114.11	\$67,114.11	Balance in 709
	Provide Additional Parking Areas	1450	1 Unit	\$125,000.00	\$0.00	\$0.00	\$0.00	
	Supply & Install Bathtub Enclosures	1460	210 Units	\$0.00	\$163,105.08	\$163,105.08	\$0.00	
	Exterior Painting of Second Story Bldgs.	1460	13 Buildings	\$0.00	\$20,570.50	\$20,570.50	\$20,570.50	
Sub-Total				\$375,000.00	\$268,789.69	\$268,789.69	\$87,684.61	
FL 4-6 Murchison Terrace 190 Units	Kitchen Cabinets	1460	190 Units	\$250,000.00	\$0.00	\$0.00	\$0.00	
	Install Ceramic Tile in Admin. Office	1470	1 Unit	\$0.00	\$585.81	\$585.81	\$585.81	
	Demo Water Heater Sheds & Inst. HVAC	1460	190 Units	\$440,792.00	\$874,450.00	\$874,450.00	\$473,556.14	
	Sub-Total				\$690,792.00	\$875,035.81	\$875,035.81	\$474,141.95
FL 4-9 Ivey Lane Homes 184 Units	Landscape	1450	Common Areas	\$50,000.00	\$0.00	\$0.00	\$0.00	
	Dumpster Enclosures	1450	12 Units	\$0.00	\$15,789.00	\$15,789.00	\$0.00	
	Re-Glaze Bathtubs	1460	184 Units	\$50,000.00	\$0.00	\$0.00	\$0.00	
	Sub-Total				\$100,000.00	\$15,789.00	\$15,789.00	\$0.00

Signature of Executive Director and Date

**X**

Signature of Public Housing Director / Office of Native American Programs Administrator and Date

**X**

(1) To be completed for Performance and Evaluation Report of a Revised Annual Statement.

(2) To be completed for the Performance and Evaluation Report.

**Annual Statement/Performance and Evaluation**  
 Comprehensive Grant Program (CGP) **Part II: Supporting**  
**Pages**

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

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA - Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
FL 4-10 Lorna Doone Apt 104 Units	Efficiency Apt. Conversion to 1 Bedroom	1460	60	\$0.00	\$0.00	\$0.00	\$0.00	
	Renovate Shuffleboard Court	1450	1 Unit	\$25,000.00	\$0.00	\$0.00	\$0.00	
	Install Air Conditioning	1460	104 Units	\$0.00	\$0.00	\$0.00	\$0.00	
	Re-Roof	1460	15000SF	\$0.00	\$85,000.00	\$85,000.00	\$0.00	
	Install Security Screen Doors	1460	104 Units	\$0.00	\$905.51	\$905.51	\$905.51	
	Sub-Total	1460		\$25,000.00	\$85,905.51	\$85,905.51	\$905.51	
FL 4-11 Meadowlake Apts 87 Units	Replace Central Air Conditioning	1460	82 Units	\$0.00	\$0.00	\$0.00	\$0.00	
	Replace Sidewalks	1450	585 LF	\$0.00	\$2,341.95	\$2,341.95	\$2,341.95	
	Sub-Total			\$0.00	\$2,341.95	\$2,341.95	\$2,341.95	
FL 4-12 Johnson Manor 40 Units	Replace Air Conditioners	1460	40 Units	\$60,000.00	\$32,760.00	\$32,760.00	\$32,760.00	
	Install Vinyl Carpet Admin Bldg	1470	1 Unit	\$10,000.00	\$23,926.12	\$23,926.12	\$23,926.12	
	Sub-Total			\$70,000.00	\$56,686.12	\$56,686.12	\$56,686.12	
FL4-12A Citrus Square 87 Units	Install Frontage Fencing	1450	686LF	\$0.00	\$21,945.00	\$21,945.00	\$0.00	
	Install Central Air Conditioning	1460	82 Units	\$0.00	\$0.00	\$0.00	\$0.00	
	Landscape and Install Irrigation System	1450	1 Unit	\$0.00	\$50,000.00	\$50,000.00	\$69.12	
	Supply & Install Kitchen Cabinets	1460		\$0.00	\$211,684.92	\$211,684.92	\$303.92	
	Install Polypropylene Siding	1460	87 Units	\$0.00	\$148,295.59	\$148,295.59	\$148,295.59	
	Sub-Total			\$0.00	\$431,925.51	\$431,925.51	\$148,668.63	
FL 4-13 Omega Apts 74 Units	Install Siding	1460	74 Units	\$0.00	\$64,684.79	\$64,684.79	\$64,684.79	
	Exterior Repipe	1460	74 Units	\$80,000.00	\$0.00	\$0.00	\$0.00	
	Supply & Install Kitchen Cabinets	1460		\$0.00	\$165,000.00	\$165,000.00	\$0.00	
	Frontage Fence	1450	538 LF	\$0.00	\$17,795.08	\$17,795.08	\$0.00	
	Sub-Total			\$80,000.00	\$247,479.87	\$247,479.87	\$64,684.79	
Fl 4-14 Marden Meadows 45 Units	Interior Re-Pipe	1460	45 Units	\$0.00	\$0.00	\$0.00	\$0.00	Work Performed in 707
	Install Central Air Conditioning	1460	45 Units	\$0.00	\$16,717.24	\$16,717.24	\$16,717.24	
	Sub-Total			\$0.00	\$16,717.24	\$16,717.24	\$16,717.24	

Signature of Executive Director and Date <b>X</b>	Signature of Public Housing Director / Office of Native American Programs Administrator and Date <b>X</b>
------------------------------------------------------	--------------------------------------------------------------------------------------------------------------

(1) To be completed for Performance and Evaluation Report of a Revised Annual Statement.  
 (2) To be completed for the Performance and Evaluation Report.

## **RESIDENT ASSESSMENT SATISFACTION SURVEY FOLLOW-UP PLAN**

The Follow-Up Plan is developed in response to challenges identified in the Resident Assessment Satisfaction Survey (RASS) component of the Public Housing Assessment System (PHAS). The Plan focuses on the areas of the RASS where resident response was less than satisfactory, as determined by the weighted scores based on national averages for each area. The Orlando Housing Authority is required to respond with a Follow-Up Plan for these areas;

- 1) Communication
- 2) Safety
- 3) Neighborhood Appearance

The Orlando Housing Authority is strongly committed to resident empowerment and involvement. The Follow-Up Plan will serve as a template for increasing responsiveness to resident issues. The high level of commitment to Orlando Housing Authority residents demonstrated in the other areas of the RASS will be maintained.

The Follow-Up Plan is designed to continue to the effective practices of the Orlando Housing Authority and to review and implement ways of reducing resident concerns. As always, dialogue with residents will continue and staff will periodically assess activities and progress in meeting the challenges as represented by the results of the RASS.

### **AREA I: COMMUNICATION**

The Orlando Housing Authority embraces residents as valuable partners. The OHA Family Services Department provides technical assistance to resident associations so that residents can learn how to effectively advocate for their community's needs.

Resident association meetings are held on a monthly basis. The associations are formally incorporated with approved by-laws and the certified election of officers. Orlando Housing Authority staff is represented at every meeting. Generally, members of the Family Services Department, Maintenance Department and site manager are present. The Executive Director attends most meetings. Additionally, the Executive Director meets on a monthly basis with the Presidents of the resident associations. The meetings provide a forum for discussion of current issues. Additionally, they provide an opportunity for OHA and residents to exchange information about activities.

#### ***Challenges***

The Orlando Housing Authority is committed to establishing and maintaining effective communication with its residents. In 2000, a monthly Director's Report newsletter was created and continues to provide residents with news about OHA and resident issues. Special events are promoted through mass mailings or door-to-door distribution of flyers.

A Capital Fund Program needs survey is conducted every year, as is a Public Housing Drug Elimination Program survey. The results of the surveys are used to design and adapt the planned expenditures for the grant funds based on resident needs and input.

### ***Customer Service***

The Resident Assessment Satisfaction Survey (RASS) indicates some areas of communication where the Orlando Housing Authority needs to focus improvement strategies. Customer service interactions, particularly between maintenance staff and residents, will benefit from additional staff training. As a result of this need, all maintenance staff will receive Customer Service training in the year 2002.

### ***Public Housing Managers***

Site managers will continue to receive supervision from the Public Housing Director. A schedule of training and discussion topics focused on increasing positive communication with residents will be implemented throughout 2002.

## **AREA II: SAFETY**

### ***Capital Improvements***

The items contained in the Safety portion of the RASS questionnaire reflect resident feelings about how safe they feel within their homes. Some questions address the physical condition of the property, including safety lighting and door locks. Other questions pertain to the screening of residents, police responsiveness to complaints, drug activity and vacant units. Because the issue of safety is as much one of perception as it is of practical safeguards, several questions are not scored because they reflect areas over which OHA has little or no control (e.g. location of property).

The Orlando Housing Authority, through its Capital Fund Program, has completed, or will soon complete, physical improvements designed to increase safety on its properties. A detailed list of capital improvements and renovations demonstrates such activity as security window screening, fences and safety lighting.

### ***Resident Screening***

The Admissions and Occupancy Department is responsible for initial screening of all potential residents. Extensive criminal background checks are conducted, along with reference checks and other verifications. OHA will continue to carefully screen applicants within the parameters of Fair Housing. Public Housing Department staff is responsible for assuring resident compliance with continued occupancy rules. OHA aggressively pursues lease violations and will continue to do so. However, the eviction process is governed by strict legal guidelines, notwithstanding the Orlando Housing Authority's desire to evict disruptive residents.

### ***Law Enforcement Partnerships***

The Orlando Housing Authority meets with officers from the Orlando Police Department and deputies from the Orange County Sheriff's Office on a quarterly basis. Individual site managers and resident association representatives meet with the assigned officers and deputies on a weekly basis. The partnership between law enforcement agencies and OHA is active and productive. Special concerns may be addressed at any time on an "as needed" basis.

## **AREA III: NEIGHBORHOOD APPEARANCE**

The Orlando Housing Authority is proud of the appearance of its complexes. Its best efforts are directed toward reducing the "public housing" appearance of its sites. In some cases, the location, age and design of the buildings pose special challenges to keeping an attractive appearance. Questions on RASS survey include areas such as noise, graffiti, trash and pest control. The challenges of maintaining an attractive physical appearance of OHA properties will be addressed primarily through Capital Fund Program improvements. All planned and completed Capital Fund Program improvements are detailed in a listing for each site.

### ***Pest Control***

The Orlando Housing Authority maintains a Pest Control Schedule as included in the Maintenance Operations Policies and Procedures. In addition to the planned control of insects and rodents, additional services are conducted on an "as needed" basis at the request of the site manager. The Florida climate contributes to the difficult control of some pests. The lack of sustained cold weather fails to deplete the population as in colder climates. Special attention is paid to the problems of pest control as outlined in the OHA Pest Control Policy.

### ***Resident Associations***

During 2002, each resident association will be asked to continue to encourage residents to participate in the upkeep of each property by encouraging trash pick-up. The monthly Resident Association President's meeting with the Executive Director will continue to offer an opportunity for residents to bring special concerns to the staff.

### ***Vacancies***

Vacancies are secured immediately. While the turn-around time is different at every site, vacancies are a priority. Maintenance staff follows a schedule of activities for unit readiness with resident safety and security a concern.

**Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) Part I: Summary**

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

OMB Approval No. 2577-0157 (Exp. 7/31/98)

HA Name <b>Orlando Housing Authority</b>	Comprehensive Grant Number CGP FL29P004-708	FFY of Grant Approval 1999
---------------------------------------------	------------------------------------------------	-------------------------------

Original Annual Statement   
 Reserve for Disaster/Emergencies   
 Revised Annual Statement Number   
 Performance & Evaluation Report for Program Year Ending 09/30/01  
 Final Performance & Evaluation Report   
Revision #2

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGP Funds	\$0.00	\$0.00	\$0.00	\$0.00
2	1406 Operations (May not exceed 10% of line 19)	\$0.00	\$0.00	\$0.00	\$0.00
3	1408 Management Improvements	\$470,323.00	\$305,849.20	\$305,849.20	\$84,088.05
4	1410 Administration	\$362,757.00	\$362,757.00	\$362,757.00	\$352,524.66
5	1411 Audit	\$0.00	\$0.00	\$0.00	\$0.00
6	1415 Liquidated Damages	\$0.00	\$0.00	\$0.00	\$0.00
7	1430 Fees and Costs	\$100,000.00	\$181,601.35	\$181,601.35	\$77,997.39
8	1440 Site Acquisition	\$392,084.00	\$0.00	\$0.00	\$0.00
9	1450 Site Improvement	\$450,000.00	\$255,980.85	\$255,980.85	\$88,953.70
10	1460 Dwelling Structures	\$1,217,406.00	\$1,814,340.43	\$1,814,340.43	\$777,086.05
11	1465.1 Dwelling Equipment-Nonexpendable	\$0.00	\$10,534.87	\$10,534.87	\$10,534.87
12	1470 Non-dwelling Structures	\$10,000.00	\$24,511.93	\$24,511.93	\$24,511.93
13	1475 Non-dwelling Equipment	\$225,000.00	\$26,518.78	\$26,518.78	\$4,776.91
14	1485 Demolition	\$0.00	\$589,300.00	\$589,300.00	\$0.00
15	1490 Replacement Reserve	\$0.00	\$0.00	\$0.00	\$0.00
16	1495.1 Relocation Costs	\$150,000.00	\$56,175.59	\$56,175.59	\$4,932.73
17	1499 Mod Used for Development	\$0.00	\$0.00	\$0.00	\$0.00
18	1502 Contingency (may not exceed 8% of line 19)	\$250,000.00	\$0.00	\$0.00	\$0.00
19	Amount of Annual Grant (Sum of lines 2-18)	<b>\$3,627,570.00</b>	<b>\$3,627,570.00</b>	<b>\$3,627,570.00</b>	<b>\$1,425,406.29</b>
20	Amount of Line 19 related to LBP Activities	\$186,614.00	\$20,000.00	\$20,000.00	\$3,021.86
21	Amount of Line 19 related to Section 504 Compliance	\$0.00	\$0.00	\$0.00	\$0.00
22	Amount of Line 19 related to Security	\$300,000.00	\$0.00	\$0.00	\$0.00
23	Amount of Line 19 Related to Energy Conservation	\$945,000.00	\$0.00	\$0.00	\$0.00

Signature of Executive Director and Date X	Signature of Public Housing Director/Office of Native American Programs Administrator and Date X
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**YEAR 2 PROGRESS**

**Planning Area I**

- 1) Develop the capacity to create and manage a range of housing initiatives
- 2) Add 100 incremental units of quality, affordable, mixed-income housing for rental by lower to moderate-income individuals and families, and to replace housing lost through conversion, demolition and disposition
- 3) Develop 20 units of affordable units for ownership by lower-income families
- 4) Preserve the affordable nature of subsidized housing that is currently at risk from expired/expiring restrictions for use as low-income housing

**PROGRESS:**

The Orlando Housing Authority sought opportunities to purchase existing properties for development into mixed-income complexes. Several possibilities were explored but none were financially sound investments for OHA. OHA initiated discussions with the Orange County Housing and Community Development Department regarding the redevelopment of Hawthorne Village, an 84 unit apartment complex in Apopka, Florida. Other funding sources are being pursued, including possible bond issuance by OHA.

A Housing Counselor was hired to assist public housing residents and Section 8 participants in preparing for homeownership. Additionally, a Business Development/Employment Counselor was hired to help residents in the area of economic development. In August 2001, the Orlando Housing Authority mailed 11,000 letters to potential homeownership candidates. Nearly 1000 families expressed an interest and their applications are being processed through the HOPE VI Homeownership office. Thirteen potential homebuyers have been referred to financial institutions for first mortgage processing based on their current financial status and mortgage pre-qualifications.

Developer agreements for the final phases of the Hampton Park HOPE VI have been submitted to HUD and await final approval. An extension of the original grant agreement has been requested. The extension is necessary because of a significant delay in the signing of the original agreement with HUD, due to numerous factors, since successfully resolved.

**Planning Area II**

- 1) Achieve geographic diversity with the placement of 80% of new affordable units in areas with income levels above 50% of median
- 1) Achieve a 20% increase in the use of tenant-based assistance in areas where incomes are above 50% of median
- 2) Achieve mandatory income mixes in public housing

**PROGRESS:**

The area of deconcentration of poverty received considerable attention. The Admissions and Continued Occupancy Plan was rewritten in 2001 to include strategies that will achieve mandatory income-mixing in public housing and increasing the use of Section 8 in non-impacted areas. OHA has continued its marketing efforts to targeted populations. With special emphasis on recruiting potential Section 8 landlords of properties in non-

impacted areas. OHA conducted an analysis of all (eligible) complexes to determine average income and the Authority wide average was calculated. At this time all complexes are within the required range. No action is required.

### **Planning Area III**

- 1) Achieve employment of at least one non-elderly/non-disabled adult family member in 20% of public housing households affected
- 2) Reduce current rate of unemployment among adult Section 8 beneficiaries by 10%
- 3) Enable 10 beneficiaries of tenant-based assistance to become homeowners
- 4) Enable 10 public housing families to achieve homeownership
5. Facilitate the development and operations of 1 additional resident-owned business

#### **PROGRESS:**

The Homeownership Program is very active. A screening process for current Section 8 recipients and public housing residents was developed through a coordinated process of OHA Family Services and the HOPE VI office. Participants who are not ready for homeownership are referred to appropriate agencies and lenders for credit repair, budgeting, homeownership training and mortgage exploration.

The OHA Family Services Department continues to assist residents with employment activities through direct services and partnerships with area entities. OHA is a One Stop Partner through the State of Florida Workforce Investment Act and coordinates its employment activities through the One Stop Centers. The resident training program continues as well, training residents in a variety of tasks, with a focus on personal development and job-readiness.

In September 2001, OHA hired Mark Mason as Assistant Family Services Director of Business Development/Employment Services Coordinator. Mr. Mason has conducted two employment workshops and continues to work with residents on an individual basis for employment. In Plan Year Three, Mr. Mason will develop job partnerships, training initiatives, and assist in the development of resident-owned businesses.

### **Planning Area IV**

- 1) Achieve a 15% higher level of satisfaction among residents of neighborhoods containing distressed public housing
- 2) Increase the economic viability of OHA by reducing the need for HUD funding by 2%
- 3) Improve the physical conditions of existing OHA owned or OHA managed housing units to achieve rent comparability with standard quality housing in the local private housing market
- 4) Increase by 10% the number of local residents with a favorable image of OHA and its program beneficiaries
- 5) Increase effective resident involvement in improvement initiatives
- 6) Increase the ability of OHA to provide quality services by improving employee performance, productivity and customer service

#### **PROGRESS:**

OHA offered a number of training activities to staff, designed to increase customer services skills and familiarity with the new requirements of the Quality Housing and Work Responsibility Act of 1998 (QHWRA or Housing Reform Act). The Resident Advisory Board participated in the development of the Annual Plan. Flat rents were implemented to give residents an incentive to save money, particularly for homeownership purposes.

The OHA Family Services Department continued to assist resident organizations in their development and growth. Several resident associations received the 2002 Mayor's Neighborhood Matching Grants, to conduct activities such as arts and crafts classes, family movie nights, resident resource centers and sponsor a health awareness/ community fairs.

The Orlando Housing Authority also continued to provide technical assistance to Lake Mann Homes, Ivey Lane Homes and Omega Apartments through the Tenant Opportunity Program grants. Activities were begun on the Economic Development and Supportive Services grant (EDSS) and the Resident Opportunity for Self-Sufficiency (ROSS) grant including the hiring of a Resident Services Aide to provide outreach and technical assistance elderly residents. The ROSS grant will focus exclusively on elderly services for the many elderly residents in public housing.

**Policy to Deconcentrate Poverty and Promote Integration  
in Public Housing**

**Background**

Included in Quality Housing and Work Responsibility Act of 1998 (QHWRA or Housing Reform Act) is a requirement that public housing authorities submit, with their Agency Plans, an admissions policy designed to promote income-mixing within public housing complexes. The U.S. Department of Housing and Urban Development (HUD) established “income-mixing” rules and tools for evaluation of the current income-mix. The procedures are delineated, “Rule to Deconcentrate Poverty and Promote Integration in Public Housing; Final Rule”, published in the Federal Register as 24 CFR Part 903 and dated 22 December 2000.

**Policy**

The intent of the deconcentration policy is to promote mixed-income developments through the use of admissions incentives. The QHWRA specifically states that specific income and/or racial quotas may not be imposed. Deconcentration can only occur through admissions procedures. Families currently residing in developments will not be affected by the regulations.

Additionally, families seeking admission to public housing may be offered incentives (e.g. a free month’s rent) to choose a housing unit in a development in need of higher or lower income families to provide required income-mixing. Under no circumstances shall any adverse action be taken toward a family who chooses not to accept the incentive and refuses housing in the offered development.

**Determination of Covered Developments**

Only certain developments within a housing authority are covered by the deconcentration rule;

- 1) Sites with 100 or more units
- 2) General family developments

Other developments, such as those designated as elderly and handicapped only, those complexes of fewer than 100 units, complexes approved for demolition and developments with an established mixed-income plan (HOPE VI) are exempt from the deconcentration rule. Based on the criteria, the Orlando Housing Authority developments covered by the Deconcentration Rule are;

- 1) Griffin Park
- 2) Ivey Lane Homes
- 3) Murchison Terrace
- 4) Lake Mann Homes
- 5) Reeves Terrace

**Required Established Income Ranges**

The Deconcentration Rule outlines the method under which average incomes are determined for each complex. Using a formula that assigns a bedroom size “factor”, the calculation is made by taking the average of the total incomes within the complex, adjusted for bedroom size. The averages for each site are then added together and averaged for “an authority-wide” income.

Based on the authority-wide average income, each complex must then fit into a range of between 85% and 115% of the authority-wide average income. The range must be evaluated once per year and results included in the Agency Plan, along with plans to correct situations where a complex is “out-of-range”.

### **Current Status of Orlando Housing Authority Sites**

The Orlando Housing Authority sites are currently within the Established Income Range;

Griffin Park	96%
Ivey Lane Homes	94.6%
Murchison Terrace	99.6%
Lake Mann Homes	105%
Reeves Terrace	96%

Therefore, no corrective action is needed at this time.

### **Procedure for Corrective Action When Required**

The Deconcentration Rule requires admission policy procedures to correct imbalances within sites that do not meet the Established Income Range. The procedures are as follows;

- 1) When a development is determined to be outside of the Established Income Range, the Director of Admissions and Occupancy will notify the Deputy Director. The Deputy Director and Admissions and Occupancy Director will evaluate the degree to which the identified development is outside of the Established Income Range. A determination will be made as to why the situation developed, i.e. is there an identifiable reason that caused the situation to occur? When the determination is made, then a corrective plan of action will be developed. For example, capital improvements may be needed to make the site more desirable and such improvements may be included in the capital budget.
- 2) Depending on the reason for the situation, there may be a need to skip a family on the waiting list in an effort to further the goals of deconcentration. HUD has established that “skipping” for the purposes of deconcentration does not constitute an adverse action.
- 3) The Orlando housing Authority may choose to justify to HUD the reason that the complex is outside of the Established Income Range.
- 4) OHA may choose to provide incentives, including an affirmative marketing plan, rent incentives or adding additional amenities to the site.

The chosen admission activities shall occur until the development is within the Established Income Range.

### **Fair Housing**

No action of the housing authority in attempting to achieve deconcentration and income-mixing shall violate Fair Housing policies.

**Attachment C Initial Assessment: Voluntary Conversion of Developments from Public Housing Stock**

*(Certification submitted HUD as required in 2001)*

**CERTIFICATION**

**Voluntary Conversion of Developments from Public Housing Stock; Required Initial Assessment**

*(Pursuant to Final Rule -Federal Register 66 FR 4476 (24 CFR Part 972))*

Pursuant to the Final Rule contained in Federal Register 66 FR 4476 (24 CFR Part 972), the Housing Authority of the City of Orlando hereby certifies that:

- 1) it currently operates 1607 units of public housing, contained in 12 developments;
- 2) based on the regulations contained in the final rule, 3 of the 12 public housing developments are not covered developments (elderly and or disabled), and are therefore exempt from this initial assessment (see attached Chart A);
- 3) it has reviewed each covered development's operation as public housing; and
- 4) it has considered the implications of converting the public housing to tenant-based assistance; and
- 5) conversion of the covered developments may be inappropriate because removal of the covered developments from public housing inventory would not meet the necessary conditions for voluntary conversion described in 24 CFR Part 972, Subpart B (c) .

**ADDENDUM  
ORLANDO HOUSING AUTHORITY  
INITIAL ASSESSMENT OF VOLUNTARY CONVERSION OF PUBLIC HOUSING TO TENANT BASED ASSISTANCE  
Pursuant to 24 CFR Part 972 (Final Rule Federal Register 66 4476)**

#	OHA Complex Name/Address	Year Built	# Units	CONVERSION WOULD ..			IS THE DEVELOPMENT APPROPRIATE FOR CONVERSION ?
				(1) not be more expensive than continuing operation as public housing	(2) Principally benefit residents of the public housing developments	(3) Not adversely affect the availability of affordable housing in the community	
4-1	<b>Griffin Park</b> 520 Callahan Dr, Orl, 32805	1941	198	Incorrect	Incorrect	Incorrect	NO
4-2/5	<b>Reeves Terrace</b> 200 Victor Ave., Orl, 32801	1942/ 1951	176	Incorrect	Incorrect	Incorrect	NO
4-3	<b>Carver Court</b> 775 W. Gore St., Orl, 32805	1945	212	N/A	N/A	NA	EXEMPT (SECTION 18 DEMOLITION APPROVAL, JULY 30, 2001)
4-4	<b>Lake Mann Homes</b> 624 Bethune Dr.,Orl, 32805	1951	210	Incorrect	Incorrect	Incorrect	NO
4-6	<b>Murchison Terrace</b> 3527 N. Wilts Ct.,Orl, 32805	1953	190	Incorrect	Incorrect	Incorrect	NO
4-9	<b>Ivey Lane Homes</b> 24 Fanfair Ave.,Orl,, 32805	1971	184	Incorrect	Incorrect	Incorrect	NO
4-10	<b>Lorna Doone Apts.</b> 1617 W. Central Blvd., Orl, FL 32805	1970	104	N/A	N/A	NA	EXEMPT - ELDERLY /DISABLED
4-11	<b>Meadow Lake Apts.</b> 3546 Meadow Lake Ln., Orlando, 32808	1976	87	N/A	N/A	NA	EXEMPT - ELDERLY /DISABLED
4-12	<b>Johnson Manor</b> 4775 Curry Ford Rd., Orl.,32805	1983	40	N/A	N/A	NA	EXEMPT - ELDERLY /DISABLED
4-12A	<b>Citrus Square</b> 5625 Hickey Dr., Orl, 32822	1983	87	Incorrect	Incorrect	Incorrect	NO

4-13	Omega Apartments 2811 Gamma Dr.,Orl 32810	1981	74	Incorrect	Incorrect	Incorrect	NO
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**Attachment D Description of Implementation of Community Service Requirements**

Not Applicable pursuant to Section 432 of H.R. 2620

FY 2002 VA/HUD Appropriations Bill

**ORLANDO HOUSING AUTHORITY PET POLICY**

**PURPOSE:** To increase the opportunity for public housing residents to experience the benefits of companion animal ownership within guidelines designed to protect all residents and other members of the community

**GUIDELINES:** All residents requesting pet ownership under this policy are required to sign a **Pet Ownership Lease Addendum**. **Failure** to report pet ownership is a **lease violation** and may **result in eviction**.

1. No more than 1 dog **OR** cat per household is allowed.
2. A maximum of 2 birds per household is allowed.
3. An aquarium or fish tank may not exceed 20 gallon capacity.
4. Dogs may not exceed 15 inches at the shoulder and 25 pounds at maturity.
5. Cats may not exceed 10 inches at the shoulder and 25 pounds at maturity.
6. No snakes/dangerous animals/wildlife/endangered species as defined by Orange County ordinance
7. The Orlando Housing Authority's Executive Director will determine whether other animals are permitted, on a case-by-case basis.
8. A **NON-REFUNDABLE** fee of \$100 for dogs and cats, or a \$25 **NON-REFUNDABLE** fee for all other animals, fish or birds must be paid in full prior to the pet being in the unit. The fee is to offset increased OHA maintenance costs.
9. All animals must be registered with the City of Orlando or Orange County Animal Services, as required through their respective ordinances.
  10. Documentation of all required inoculations and registration must be given to the site manager. Inoculations required are based on Orange County ordinances and proof of inoculations and registration must be presented at the annual recertification.
  11. The site manager will keep a picture of dogs, cats or other animals on file as a means of identifying the registered pet.
  12. Dogs and cats over 6 months of age must be spayed or neutered. Proof is required.
  13. The name and contact information of a person who will care for pets in the owner's absence must be kept on file in the resident's record.
  14. OHA will not be responsible for any damage or injuries caused by pets.
  15. Pets must be leashed (including cats) whenever out of the unit.
  16. Pets may be exercised only in designated areas at each complex. Pet waste must be placed in a plastic bag and put into a dumpster.
  17. Pets may not be a nuisance through noise or behavior. All complaints will be investigated by the manager and reported in the resident file. Repeated offenses are cause for eviction.
  18. Pets found loose on OHA property will be removed by an authorized animal service for which the resident will be charged.
  19. Any maintenance actions caused by the pet will be charged to the resident.
  20. OHA may, at its discretion, determine the pet unsuitable for living in a unit.

The Pet Ownership Lease Addendum contains more detailed information than the summary contained here.

**It is recommended that all pet owners purchase liability insurance.**

# LEASE ADDENDUM

## TO ALLOW FOR PETS

Lessee: \_\_\_\_\_ Account Number: \_\_\_\_\_

Co-Lessee: \_\_\_\_\_ Pet Deposit: \_\_\_\_\_

Name and Description of Pet: \_\_\_\_\_

\_\_\_\_\_

I, \_\_\_\_\_ agree to the following rules and statements made in the Lease Addendum as set by Orlando Housing Authority (OHA).

When OHA refers to pets, this means only **dogs, cats, birds, and fish** are included. This Lease Addendum tells me what I am responsible for and what OHA is responsible for concerning my pets.

Any resident who wishes to have a pet, must have a completed and signed pet agreement, and registration document in the lease file.

No more than one dog or cat shall be permitted in a household. In the case of birds, a maximum of two birds may be permitted. There shall be no limit as to the number of fish, but no more than **one** aquarium with a maximum capacity of **20** gallons shall be permitted.

### The following dog breeds are not permitted:

**Doberman Pincher**

**Bull Terrier**

**Miniature Pincher**

**Staffordshire Bull Terrier**

German Shepherd

American Pit Bull Terrier

Husky (all types)

American Staffordshire Terrier

Chow

Mastiff

**Pit Bull Terriers**

**Rottweiler**

I also understand that my pet cannot be larger than:

1. **Dog** - 15 inches tall, and not to exceed twenty-five (25) pounds when full grown.
2. **Cat** - 10 inches tall, and not to exceed fifteen (15) pounds when full grown.

I agree to pay a **non-refundable** pet fee of **\$100.00** for dogs and cats, and a **non-refundable** fee of **\$25.00** for fish and birds. I must pay this amount in full before I can have my pet in my apartment. OHA can use this money to pay for damages caused by my pet, and to cover the reasonable operating costs to the development related to the presence of pets.

### **What I Must Do:**

1. I must provide OHA with all verifications of my pet's inoculations, and provide proof that my pet has been neutered or spayed. I must bring verifications of inoculations each year at the annual recertification.
2. I must provide the name, address, and telephone number of one or more persons who will care for the pet if I am unable to do so.
3. I must hold harmless OHA for any injuries or damages caused by my pet.
1. I must make sure my pet receives the medical care necessary for my pet to maintain good health.
2. I must have my dog on a leash any time it is out of my apartment. I must have my cat on a leash any time it is out of my apartment.
3. I must not walk or exercise my pet anywhere in a building. I will exercise my pet only in the area on OHA grounds that are marked as exercise areas.
4. I must accept complete responsibility for the behavior and conduct of my pet at all times.
5. The resident shall be responsible for immediately disposing of all animal waste inside the common area or on the complex grounds. The residents shall pick up and dispose of all animal waste in accordance with the following:
  - a. Waste must be placed in a plastic bag, tightly secured and deposited in a dumpster. A **\$15.00** charge will be levied each time a pet owner fails to remove pet waste in accordance with this rule.
  - b. Residents owning a cat must provide a litter box for the cat, and it must be changed at least twice a week.
  - c. At no time will pet waste be placed in trash chutes.
6. My animal must be secured when OHA employees or representatives enter the apartment.

### **What OHA Will Not Do:**

1. OHA will not be responsible for my pet at any time regardless of the circumstances.
2. OHA will not be responsible for any damages or injuries caused by my pet.
3. OHA will not permit my pet to become a nuisance to management or other residents.

4. OHA staff and/or representatives will not enter to do work in my apartment if my animal has not been secured.

**What OHA Will Do:**

1. When it is necessary for OHA to spray for fleas and ticks or other insects caused by my pet, other than at the regular appointed time, OHA will charge me for the cost of spraying.
2. OHA will call an authorized animal service to pick up any pet found roaming the sites.
3. OHA will take appropriate actions if my pet is causing the living or working conditions in my building to be unsafe, unsanitary, or indecent.
4. OHA will give me a Notice to Vacate and will end my Lease if there are repeated or continuous problems with my pet.

**Do I Understand This Lease Addendum:**

This policy is an agreement between the head of household and the Orlando Housing Authority.

By Signing this **Lease Addendum**, I am saying that OHA has gone over it with me. I am also saying that I understand all of it. I accept **all** financial responsibilities for my pet and hold harmless OHA from all claims, cause of action, damages or expenses, including attorney's fees, resulting from the action or the activities of my pet.

I further understand, that failure to comply with any part of the above rules and regulations will be cause for termination of the lease.

\_\_\_\_\_  
I have received a copy of this policy.  
Lessee

\_\_\_\_\_  
Date

\_\_\_\_\_  
OHA Representative

\_\_\_\_\_  
Title

## Attachment F

## Most Recent Board Approved Operating Budget

a. Type of Submission <input checked="" type="checkbox"/> Original <input type="checkbox"/> Revision No. _____		b. Fiscal Year Ending <b>March 31, 2001</b>	c. No. of months (check one) <input checked="" type="checkbox"/> 12 mo. <input type="checkbox"/> Other (specify) _____	d. Type of HUD assisted project(s) 01 <input checked="" type="checkbox"/> PHA/IHA-Owned Rental Housing 02 <input type="checkbox"/> IHA-Owned Mutual Help Homeownership 03 <input type="checkbox"/> PHA/IHA-Leased Rental Housing 04 <input type="checkbox"/> PHA/IHA-Owned Turnkey III Homeownership 05 <input type="checkbox"/> PHA/IHA Leased Homeownership				
e. Name of Public Housing Agency / Indian Housing Authority (PHA/IHA) <b>Orlando Housing Authority</b>				i. HUD Field Office <b>Jacksonville, Fl</b>				
f. Address (city, State, zip code) <b>300 Reeves Court Orlando, Florida 32801</b>				h. PAS / LOCCS Project No. <b>F L 0 0 4 0 0 1 0 0 M</b>				
g. ACC Number <b>A-4129</b>		j. No. of Dwelling Units <b>1,607</b>		k. No. of Unit Months Available <b>19,284</b>		m. No. of Projects <b>8</b>		
Line No.	Acct. No.	Description (1)	Actuals Last Fiscal Yr. 1999 PUM (2)	[XX] Estimates [ ] or Actual Current Budget Yr. 2000 PUM (3)	Requested Budget Estimates			
					PHA/IHA Estimates		HUD Modifications	
					PUM (4)	Amount (to nearest \$10) (5)	PUM (6)	Amount (to nearest \$10) (7)
<b>Homebuyers Monthly Payments For:</b>								
010	7710	Operating Expenses						
020	7712	Earned Home Payments						
030	7714	Nonroutine Maintenance Reserve						
<b>040</b>	<b>Total</b>	<b>Break-Even Amount (sum of lines 010, 020, and 030)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>		
050	7716	Excess(Deficit) In Break-Even Amount						
060	7790	Homebuyers Monthly Payments (Contra)						
<b>Operating Receipts</b>								
070	3110	Dwelling Rentals	<b>144.48</b>	<b>151.25</b>	<b>160.47</b>	<b>3,094,500</b>		
080	3120	Excess Utilities	<b>7.09</b>	<b>4.77</b>	<b>2.44</b>	<b>47,000</b>		
090	3190	Nondwelling Rentals			-	-		
<b>100</b>	<b>Total Rental Income (sum of lines 070, 080, and 090)</b>		<b>151.57</b>	<b>156.02</b>	<b>162.91</b>	<b>3,141,500</b>		
110	3610	Interest on Gen Fund Investments	<b>13.72</b>	<b>9.50</b>	<b>7.79</b>	<b>150,220</b>		
120	3690	Other Operating Receipts	<b>4.03</b>	<b>4.41</b>	<b>6.09</b>	<b>117,500</b>		
<b>130</b>	<b>Total Operating Income (sum of lines 100, 110, and 120)</b>		<b>169.32</b>	<b>169.93</b>	<b>176.79</b>	<b>3,409,220</b>		
<b>Operating Expenditures - Administration:</b>								
140	4110	Administrative Salaries	<b>45.52</b>	<b>42.04</b>	<b>58.13</b>	<b>1,120,990</b>		
150	4130	Legal Expense	<b>1.56</b>	<b>0.86</b>	<b>1.24</b>	<b>24,000</b>		
160	4140	Staff Training	<b>0.34</b>	<b>0.81</b>	<b>0.26</b>	<b>5,000</b>		
170	4150	Travel	<b>2.43</b>	<b>2.43</b>	<b>2.85</b>	<b>55,000</b>		
180	4170	Accounting Fees	-	-	-	-		
190	4171	Auditing Fees	<b>0.52</b>	<b>0.52</b>	<b>1.02</b>	<b>19,600</b>		
200	4190	Other Administrative Expenses	<b>13.34</b>	<b>15.26</b>	<b>16.26</b>	<b>313,500</b>		
<b>210</b>	<b>Total Administrative Expense (sum of line 140 thru line 200)</b>		<b>63.71</b>	<b>61.92</b>	<b>79.76</b>	<b>1,538,090</b>		
<b>Tenant Services:</b>								
220	4210	Salaries	<b>7.42</b>	<b>4.05</b>	<b>1.49</b>	<b>28,750</b>		
230	4220	Recreation, Publications and Other services	<b>1.71</b>	<b>1.71</b>	<b>1.27</b>	<b>24,500</b>		
240	4230	Contract Costs, Training and Other	<b>17.35</b>	<b>17.00</b>	<b>13.90</b>	<b>268,000</b>		
<b>250</b>	<b>Total Tenant Services Expense (sum of lines 220,230, and 240)</b>		<b>26.48</b>	<b>22.75</b>	<b>16.66</b>	<b>321,250</b>		
<b>Utilities:</b>								
260	4310	Water	<b>10.27</b>	<b>10.21</b>	<b>23.52</b>	<b>453,560</b>		
270	4320	Electricity	<b>26.26</b>	<b>26.03</b>	<b>19.19</b>	<b>370,110</b>		
280	4330	Gas	<b>12.12</b>	<b>12.19</b>	<b>9.42</b>	<b>181,700</b>		
290	4340	Fuel	-	-	-	-		
300	4350	Labor	<b>0.04</b>	<b>0.04</b>	-	-		
310	4390	Other utilities expense	<b>23.97</b>	<b>23.82</b>	<b>15.03</b>	<b>289,815</b>		
<b>320</b>	<b>Total Utilities Expense (sum of line 260 thru line 310)</b>		<b>72.66</b>	<b>72.29</b>	<b>67.16</b>	<b>1,295,185</b>		

Name of PHA / IHA

Fiscal Year Ending

Orlando Housing Authority

March 31, 2001

Line No.	Acct. No.	Description (1)	Actuals Last Fiscal Yr. 1999 PUM (2)	[ XX ] Estimates [ ] or Actual Current Budget Yr. 2000 PUM (3)	Requested Budget Estimates			
					PHA/IHA Estimates		HUD Modifications	
					PUM (4)	Amount (to nearest \$10) (5)	PUM (6)	Amount (to nearest \$10) (7)
<b>Ordinary Maintenance and Operation</b>								
330	4410	Labor	51.27	49.08	56.66	1,092,590		
340	4420	Materials	16.25	15.91	16.83	324,500		
350	4430	Contract Costs	19.72	19.98	20.77	400,500		
360	<b>Total Ordinary Maintenance &amp; Operation Expense (lines 330 to 350)</b>		<b>87.24</b>	<b>84.97</b>	<b>94.25</b>	<b>1,817,590</b>		
<b>Protective Services</b>								
370	4460	Labor						
380	4470	Materials						
390	4480	Contract Costs						
400	<b>Total Protective Services Expense (sum of lines 370 to 390)</b>							
<b>General Expense:</b>								
410	4510	Insurance	11.93	12.93	16.55	319,180		
420	4520	Payments in Lieu of Taxes	8.26	7.89	9.57	184,630		
430	4530	Terminal Leave Payments	1.87	1.95	3.43	66,200		
440	4540	Employee Benefit Contributions	27.87	29.64	28.18	543,452		
450	4570	Collection Losses	1.04	.55	2.98	57,416		
460	4590	Other General Expense	.84		3.63	70,000		
470	<b>Total General Expense (sum of lines 410 to 460)</b>		<b>51.82</b>	<b>52.97</b>	<b>64.35</b>	<b>1,240,878</b>		
480	<b>Total Routine Expense (sum of lines 210, 250, 320, 360, 400, and 470)</b>		<b>301.9</b>	<b>294.9</b>	<b>322.18</b>	<b>6,212,993</b>		
<b>Rent for Leased Dwellings:</b>								
490	4710	Rents to Owners of Leased Dwellings						
500	<b>Total Operating Expense (sum of lines 480 and 490)</b>		<b>301.9</b>	<b>294.9</b>	<b>322.18</b>	<b>6,212,993</b>		
<b>Nonroutine Expenditures:</b>								
510	4610	Extraordinary Maintenance	3.15	6.11	6.17	119,000		
520	7520	Replacement of Nonexpendable Equipment	1.1	2.77	2.58	49,724		
530	7540	Property Betterments and Additions		1.5	2.46	47,400		
540	<b>Total Nonroutine Expenditures (sum of lines 510, 520, and 530)</b>		<b>4.25</b>	<b>10.39</b>	<b>11.21</b>	<b>216,124</b>		
550	<b>Total Operating Expenditures (sum of lines 500 and 540)</b>		<b>306.15</b>	<b>305.28</b>	<b>333.39</b>	<b>6,429,117</b>		
<b>Prior Year Adjustments:</b>								
560	6010	Prior Year Adjustments Affecting Residual Receipts						
<b>Other Expenditures:</b>								
570		Deficiency in Residual Receipts at End of Preceding Fiscal Yr.						
580	<b>Total Operating Expenditures, including prior year adjustments and other expenditures (line 550 plus or minus line 560 plus line 570)</b>		<b>306.15</b>	<b>305.28</b>	<b>333.39</b>	<b>6,429,117</b>		
590		Residual Receipts (or Deficit) before HUD Contributions and provision for operating reserve (line 130 minus line 580)	(136.83)	(135.35)	(156.6)	(3,019,897)		
<b>HUD Contributions:</b>								
600	8010	Basic Annual Contribution Earned-Leased Projects: Current Year						
610	8011	Prior Year Adjustments - (Debit) Credit						
620	<b>Total Basic Annual Contribution (line 600 plus or minus line 610)</b>							
630	8020	Contributions Earned - Op. Sub: - Cur. Yr. (before year-end adj)	137.85	128.3	134.7	2,597,498		
640		Mandatory PFS Adjustments (net):						
650		Other (specify):						
660		Other (specify):						
670		Total Year-end Adjustments/Other (plus or minus lines 640 thru 660)						
680	8020	Total Operating Subsidy-current year (line 630 plus or minus line 670)	137.85	128.3	134.7	2,597,498		
690	<b>Total HUD Contributions (sum of lines 620 and 680)</b>		<b>137.85</b>	<b>128.3</b>	<b>134.7</b>	<b>2,597,498</b>		
700		Residual Receipts (or Deficit)(sum of line 590 plus line 690) Enter here and on line 810	1.02	(7.05)	(21.9)	(422,399)		

Name of PHA / IHA

Orlando Housing Authority

Fiscal Year Ending

March 31, 2001

		Operating Reserve	PHA/IHA Estimates	HUD Modifications
		<b>Part I - Maximum Operating Reserve - End of Current Budget Year</b>		
740	2821	<b>PHA/IHA - Leased Housing - Section 23 or 10(c)</b> 50% of Line 480, column 5, form HUD-52564		

		Part II - Provision for and Estimated or Actual Operating Reserve at Fiscal Year End		
780		Operating Reserve at End of Previous Fiscal Year - Actual for FYE (date) <b>03/31/99</b>	<b>4,051,373</b>	
790		Provision for Operating Reserve - Current Budget Year (check one) [ X ] Estimated for FYE 3/31/2000 [ ] Actual for FYE	<b>(340,334)</b>	
800		Operating Reserve at end of Current Budget Year (check one) [ X ] Estimated for FYE 3/31/2000 [ ] Actual for FYE	<b>3,711,039</b>	
810		Provision for Operating Reserve - Requested Budget Year Estimated for FYE 3/31/01 Enter Amount from line 700	<b>(422,399)</b>	
820		Operating Reserve at End of Requested Budget Year Estimated for FYE 3/31/01 (Sum of lines 800 and 810) 139.49%	<b>3,288,640</b>	
830		Cash Reserve Requirement- <u>50</u> % of line 480	<b>2,357,630</b>	

Resident Advisory Board Meetings were held on October 20, 2001 and December 1, 2001.

**Resident Comment:**

The Section 8 Program should be open to all Section 8 participants.

**OHA Response:**

The Section 8 Homeownership Program is open to all Section 8 participants. However, persons in the Program must have been on Section 8 for at least one (1) year and currently participating in the Family Self-Sufficiency Program.

**Resident Comment:**

With the Deconcentration, HUD should not want to move us out just for to mix up the incomes (in the complex).

**OHA Response:**

The Deconcentration Policy would only apply to new admissions to Public Housing. As was stated, the Orlando Housing Authority has reviewed its eligible sites and none are subject to the Deconcentration Policy at this time. The Policy and procedures are in place in the event deconcentration is warranted in the future.

## RESIDENT ADVISORY BOARD MEMBERSHIP

**Purpose:** In response to the requirements of the Quality Housing and Work Responsibility Act of 1998 (QHWRA), the Orlando Housing Authority has established a Resident Advisory Board (RAB). The purpose of the Resident Advisory Board is to provide assistance to the housing authority in evaluating agency policies and the Agency Plan.

**Guidelines:** The Resident Advisory Board members shall be appointed by the Orlando Housing Authority Executive Director. Participation is voluntary. The initial membership of the RAB consisted of public housing Resident Association Presidents and Section 8 participants who expressed an interest in membership. The Board shall consist of 24 members, although the Executive director may increase or decrease the size as warranted by participant interest. At least half of the members will be public housing residents and the remaining half shall be Section 8 participants. One half of the Section 8 participants will be Family Self-Sufficiency Program (F.S.S.) participants who have formally contracted with the F.S.S. program. The remaining half of Section 8 membership shall be any Section 8 participant who has expressed an interest in Resident Advisory Board membership. Should there be more interest in the Resident Advisory Board than available membership slots, the Executive Director may either increase the size of the RAB, or establish smaller sub-committees to accommodate membership.

The Orlando Housing Authority Executive Director may disband the Resident Advisory Board at her/his discretion, and reconvene the Board as necessary, reserving the right to change membership. The list of Resident Advisory Board members is included below:

### RESIDENT ADVISORY BOARD

**MEETINGS: October 20, 2001, December 1, 2001**

NAME	ADDRESS	TELEPHONE	SIGNATURE
<b>Alexander, Cynthia</b> <b>Lake Mann</b>	3604 Eccleston St. Orlando, FL 32805		
<b>Aponte, Ana</b> <b>Lorna Doone</b>	1617 W. Central Blvd. Apt. 316 Orlando, FL 32805	841-8974	
<b>Armstead, Arnita</b> <b>Section 8</b>	5311 Falling Water Drive Orlando, FL 32818		
<b>Biggam, Evelina</b> <b>Griffin Park</b>	801 Avondale Ave. Apt. 1 Orlando, FL 32805	843-2636	
<b>Blanding, Keysha</b> <b>Section 8</b>	5922A Mausser Dr. Orlando, FL 32822	208-9396	
<b>Brown, Denise</b> <b>Reeves Terrace</b>	259 Reeves Terrace Orlando, FL 32801	894-4654	

<b>Cameron, Sharon</b> Section 8	2449 Silver Chase Dr. Apt. 7 Orlando, Fl 32808	521-0304	
<b>Daniels, Mary</b> Murchison Terrace	1225 Mable Butler Ave. Bldg. 3, Apt. 1 Orlando, Fl 32805	294-3563	
<b>Davis Cecelia</b> Griffin Park	738 Dunbar Ct. Apt. 7 Orlando, Fl 32805	423-0066	
<b>Day, Claudene</b> Section 8	4910 Manduria St. Orlando, Fl 32819	245-0862 Ext. 170	
<b>Faulk, Edward</b> Murchison Terrace	P. O. Box 550957 Orlando, Fl 32855	291-7496	
<b>Herbruger, Florencio</b> Lorna Doone	1617 W. Central Blvd. Apt. 316 Orlando Fl 32805	423-5074	
<b>Jacobs, Dorothy</b> Meadow Lake	3500 Meadow Lake Ln Orlando Fl 32805	296-4713	
<b>Johnson, Mary</b> Section 8	1243 Mable Butler Ave. Bldg. 5, Apt. 2 Orlando, Fl 32805	578-6205	
<b>Johnson, Violen</b> Jackson Court	523 W. Jackson St Orlando, Fl 32805	650-3560	
<b>Jones, Tammy</b> Section 8	4120 Meadow Brook Ave Orlando, Fl 32808	522-8006	
<b>Jolly, Brenda</b> Carver Court	814 Short Ave. Orlando, Fl 32805	841-2737	
<b>Kemp, Carolyn</b> Section 8	5443 Timberleaf Blvd Orlando, Fl 32811	296-8218	
<b>Lane, Doris</b> Ivey Lane	4627 Edgemoor St. Orlando, FL 32811	532-9943	
<b>Pate, Charlie</b> Griffin Park	809 Avondale Ave. Apt. 1 Orlando, Fl 32805	N/A	
<b>Patterson, Robin</b> Section 8	10365 Riva Ridge Ter Orlando, Fl 32817	381-1589	
<b>Price, Lettie</b> Jackson Court	523 W. Jackson St. Orlando, Fl 32805	N/A	
<b>Rodriguez, Annette</b> Omega Apt	2841 Gamma Dr. Orlando, Fl 32810	648-0002 316-6027	
<b>Roman, Matilda</b> Reeves Terrace	335 Jackson St. Orlando, Fl 32801	898-3403	
<b>Slade, Cassandra</b> Ivey Lane	4531 Edgemoor St. Orlando, Fl 32811	N/A	
<b>Smith, Latonya</b>	2801 Shining Willow Orlando, Fl 32808	523-9271	
<b>Thompson, Lyvonne</b> Lake Mann	730 Goldwyn Dr Orlando, Fl 32805	290-5687	
<b>Vickers, Vivica</b> Carver Court	833 W. Gore St. Orlando, Fl 32805	425-3827	
<b>Walker, Carolyn</b> Section 8	5264 Limelight Cir #8 Orlando, Fl 32811	859-7313	

<b>Wilson, Girtha</b> <b>Section 8</b>	7336 Crooked Lane Cr Orlando Fl 32818	290-1413	
<b>Wong, Tippiie Mae</b> <b>Section 8</b>	330 Lake Ave #112 A Maitland Fl 32751	740-8967	
<b>Wynn, Richard</b> <b>Murchison Terrace</b>	1305 Mable Butler Ave. Bldg. 7, Apt. 1 Orlando, Fl 32805	295-4395	

Florida Statute 421 requires seven (7) persons to serve on the Orlando Housing Authority Board of Commissioners, with at least one resident commissioner from that is either public housing resident or a Section 8 participant. The Orlando Housing Authority Board Commissioners each serve a term of four years.

**METHOD OF SELECTION:** The Mayor of the City of Orlando, Florida appoints all members of the Board, including the resident member. Prior to the expiration of the term of a current resident commissioner, the Mayor's Liaison to the Board of Commissioners will prepare a list of at least three (3) resident candidates based on nominations from bona-fide and duly recognized resident associations. Candidates for resident commissioner (resident member) are nominated by Orlando Housing Authority residents and resident organizations. Representatives of all Resident Associations are eligible to nominate candidates for Resident Commissioner.

Nominees can be any Head of Household receiving assistance through Orlando Housing Authority and living within the city limits of Orlando. Mayor's Liaison will evaluate nominees and make recommendations to the Nominating Board for review and approval. The Nominating Board will forward the approved nominee(s) to the Mayor for appointment consideration and transmittal of final selection to Orlando City Council for confirmation. It is understood that the Mayor may reject said recommendation and request that the Nominating Board seek further recommendations.

**CURRENT RESIDENT COMMISSIONER:** Ms. Doris Stallworth has served as Resident Commissioner since January 1999. Her term expires January 31, 2003. A list of the Orlando Housing Authority Board of Commissioners is included below:

#### **HOUSING AUTHORITY OF THE CITY OF ORLANDO**

The Authority is a non-profit public body corporation with all necessary powers to conduct and operate accommodations at the lowest possible rate, which must be consistent with decent, safe and sanitary standards.

Members: 7 Commissioners (one of whom shall be a tenant in a housing accommodation managed by the Authority, and no Commissioner shall be an officer or employee of the City nor receive any compensation); appointed by Mayor and confirmed by City Council. 4-year terms.

Meeting Time: 2nd Thursday each month, 2:00 p.m.

For information: Orlando Housing Authority, 300 Reeves Court, 32801, 894-1500, FAX 895-0820.

Authority: Florida Statutes, Ch. 421, 1934. Resolution presented and adopted by Council on January 12, 1938; filed Documentary #1580; Resolution adopted July 16, 1984, #18679.

<b>MEMBERS: NAME/ADDRESS</b>	<b>DATE APPOINTED</b>	<b>TERM EXPIRES</b>	<b>AGE RACE (District)</b>	<b>CITY RESIDENT</b>	<b>OTHER</b>
CARSON, Ed** 3465 Domi-Fitz Court Orlando FL 32805	3/11/96	1/31/04	45-59/B	Yes/5	Healthcare Program Analyst 245-0465
EDDY, Carson L. 1031 W. Morse Blvd., #200 Winter Park FL	9/14/98	1/31/02	45-59/C	Yes/1	Accountant 644-7455
HALBERT, Stanley E.* 2431 Aloma Ave., Ste. 113 Winter Park, FL 32792	12/20/93	1/31/03	25-44/B	Yes/1	Attorney 679-3823
HOSTETTER, Sandra 3100 Clay Ave., Ste. 220 Orlando, FL 32804	6/5/01	1/31/05	25-44/C	No	Exec. Direc. 898-1661
HOWARD Blair B. 4200 S. Orange Avenue Orlando FL 32806	4/20/98	1/31/02	45-59/C	Yes/1	Wholesale/Food/Paper 859-4200
McCALL, Mercedes F. 431 Fairway Point Circle Orlando FL 32828	6/01/98	1/31/02	45-59/H	No	Banking 370-8000
STALLWORTH, Doris 4627 Edgemoor Street Orlando, FL 32811	1/25/99	1/31/03	45-59/B	Yes/6	Community Aide 291-3083

\* Chairman

\*\* Vice Chairman      June 5, 2001

*(Excerpt from the Five Year Agency Plan)*

## **Deviations From and Modifications To the Agency Plan**

The Agency Plan is a living document which shall serve to guide OHA operations and resource management. In the event that circumstances or priorities necessitate actions, which would represent a substantial departure from the goals, objectives, timetables or policies as set forth in the plan, the OHA will invite resident review and input prior to taking actions that would implement such substantial changes.

Development of subsequent Annual Plans shall be vehicle through which updates and minor or routine modifications to the Agency Plan are made. On an annual basis the OHA will review its progress toward the achievement of its goals and objectives as set forth in the Agency Plan. It will also evaluate whether the remaining goals and objectives, and the existing policies and procedures, adequately address the needs of its constituents, stakeholders and the agency. To the extent that those needs are not met by the elements of the existing Agency Plan, the subsequent Annual Plan shall be written to reflect changes to goals, objectives, policies and procedures to address those needs.

In the event that the elements of the subsequent annual plan represent a significant departure from those of the existing Agency Plan, a Significant Amendment or Modification to the Agency Plan will be undertaken. Under these circumstances, a full and participatory planning process will be used to obtain resident and stakeholder input. A draft of the substantially modified Agency Plan will be subject to the public review, comment, and hearing process.

The OHA will honor the current HUD definitions of Substantial Deviation and Significant Amendment.

- changes to rent or admissions policies or organization of the waiting list;
- additions of non-emergency work items (items not included in the current Annual Statement or 5 Year Action Plan) or change in use of replacement reserve funds under the Capital Fund;
- additions of new activities not included in the current PHDEP Plan;
- and any change with regard to demolition or disposition, designation,

The OHA will also consider the following actions as Substantial Deviations or Significant Amendments if such actions:

- Are contrary to explicitly stated elements of the Agency Plan;
- Change the allocation of resources to any activity by more than 25%;
- Extend the timetable for completion of an activity by 12 months or more;
- Nullify existing goals or results in null action toward achievement of a goal;
- Add new goals;
- Delete existing goals; or Change the OHA mission

**OPTIONAL ATTACHMENTS**



**Attachment K      Capital Fund Program Third Plan Year Action Plan**

See Attachment FL004d04.





## Attachment L Section 8 Homeownership Capacity Statement

**PURPOSE:** To increase the homeownership opportunities of lower-income persons through the use of Section 8 subsidy the Orlando Housing Authority Board of Commissioners has chosen to institute the optional Section 8 Housing Choice Voucher Homeownership Program

### **GUIDELINES:**

1. During the first year of operation (FY 2001-2002) the program size is limited to no more than 10 families, due to staffing limitations.
2. Participation is limited to Section 8 Housing Choice Voucher Program Participants enrolled in the Family Self Sufficiency Program or enrolled in the HOPE VI Homeownership Program.
3. Eligible families will be assisted in the order in which they are able to present bona fide "Contract of Sale" agreements to the Orlando Housing Authority.
4. Participating families will be required to submit written progress reports on a monthly basis. Failure to do so will result in a review of continued program eligibility.
5. Families must attend and satisfactorily complete a pre-assistance homeownership and housing counseling program. Additionally, families must attend one post-purchase homeownership counseling session per year and if necessary, any post-purchase early delinquency counseling required by the lender/servicer. Failure to participate in the required sessions will result in a review of continued program eligibility.
6. The Orlando Housing Authority may terminate voucher assistance for failure to meet the requirements of the Section 8 program.
7. If the family defaults on the mortgage, the Orlando Housing Authority may choose to issue the family a voucher to move to a rental unit and continue rental assistance. However, the determination will at OHA's discretion be based on the good faith efforts of the family to meet its obligations and prevent default.
8. A family may not move more than one time per year.
9. One or more of the adult family members who will own the home must be continuously employed for at least one year preceeding the commencement of homeownership assistance. Continuous employment is defined as an average of 30 hours or more per week. An interruption of 4 weeks or less is not considered a break in continuity. A longer break will be considered continuous employment if the adult member of the family is employed in a seasonal industry, provided that the minimum income for eligibility is earned during the part of the year worked. It is not considered a break in continuity if one or more of the adult family members who had previously been continuously employed for at least a year is currently earning the minimum income for eligibility while working an average of at least an average of 20 hours per week and attending school or job-training for 10 or more hours per week. OHA will also consider interruptions of employment of more than 4 weeks if the family had been continuously employed for at least one-year, if the interruption in employment is due to events beyond control of the family (e.g. hurricane damage at place of work, terrorist attacks) and the minimum income requirement has been met. Preference for assignment to homeownership counseling classes will be given to families who have been continuously employed for two or more years and meet the requirements for participation in the Orlando Housing Authority Homeownership Program.
10. The Orlando Housing Authority must approve direct seller financing. Balloon payments are prohibited. Families must provide a minimum downpayment of \$1,000 of their own funds.

11. The Orlando Housing Authority must review and approve lender conditions and financing requirements. OHA may determine that the debt is unaffordable for the family.
12. Section 8 homeownership payments may be made to the lender or to the family as directed by the lender providing/servicing the first mortgage. If the family satisfactorily makes mortgage payment for 2 years to the lender, then OHA will then make payments directly to the family.

**Certifications**

Certifications to be mailed under a separate cover.

**Annual Statement/Performance and Evaluation**  
**Comprehensive Grant Program (CGP) Part II: Supporting**  
**Pages**

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

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA - Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
1408	Management Improvements	1408		\$0.00	\$250,000.00	\$250,000.00	\$66,512.26	
	Employee Training	1408			\$25,323.00	\$25,323.00	\$3,766.43	
	Resident Training	1408		\$445,000.00	\$30,526.20	\$30,526.20	\$13,809.36	
	<b>Sub-Total</b>			<b>\$445,000.00</b>	<b>\$305,849.20</b>	<b>\$305,849.20</b>	<b>\$84,088.05</b>	
1410	Administration	1410		\$362,757.00	\$362,757.00	\$362,757.00	\$352,524.66	
	<b>Sub-Total</b>			<b>\$362,757.00</b>	<b>\$362,757.00</b>	<b>\$362,757.00</b>	<b>\$352,524.66</b>	
1430	A & E Fees	1430		\$100,000.00	\$181,601.35	\$181,601.35	\$77,997.39	
	<b>Sub-Total</b>			<b>\$100,000.00</b>	<b>\$181,601.35</b>	<b>\$181,601.35</b>	<b>\$77,997.39</b>	
1440	Site Acquisition	1440		\$392,084.00	\$0.00	\$0.00	\$0.00	
	<b>Sub-Total</b>			<b>\$392,084.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
1450	Landscaping Authority Wide	1450		\$50,000.00	\$10,000.00	\$10,000.00	\$0.00	
	Playground Equipment Authority Wide	1450		\$50,000.00	\$28,842.71	\$28,842.71	\$19,428.52	
	<b>Sub-Total</b>			<b>\$100,000.00</b>	<b>\$38,842.71</b>	<b>\$38,842.71</b>	<b>\$19,428.52</b>	
1460	Lead Abatement Authority Wide	1460		\$66,614.00	\$0.00	\$0.00	\$0.00	
	<b>Sub-Total</b>			<b>\$66,614.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
1465	Appliances	1465		\$0.00	\$10,534.87	\$10,534.87	\$10,534.87	
	<b>Sub-Total</b>			<b>\$0.00</b>	<b>\$10,534.87</b>	<b>\$10,534.87</b>	<b>\$10,534.87</b>	
1475	Office Automation	1475		\$50,000.00	\$4,776.91	\$4,776.91	\$4,776.91	
	Vehicle Maintenance Equipment	1475		\$100,000.00	\$21,741.87	\$21,741.87	\$0.00	
	2 Way Radio System	1475		\$75,000.00	\$0.00	\$0.00	\$0.00	
	<b>Sub-Total</b>			<b>\$225,000.00</b>	<b>\$26,518.78</b>	<b>\$26,518.78</b>	<b>\$4,776.91</b>	
1495	Relocation	1495		\$150,000.00	\$56,175.59	\$56,175.59	\$4,932.73	
	<b>Sub-Total</b>			<b>\$150,000.00</b>	<b>\$56,175.59</b>	<b>\$56,175.59</b>	<b>\$4,932.73</b>	
1502	Mod Used For Development	1502		\$250,000.00	\$0.00	\$0.00	\$0.00	
	<b>Sub-Total</b>			<b>\$250,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
Signature of Executive Director and Date <b>X</b>				Signature of Public Housing Director / Office of Native American Programs Administrator and Date <b>X</b>				
(1) To be completed for Performance and Evaluation Report of a Revised Annual Statement. (2) To be completed for the Performance and Evaluation Report.								

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
FL 4-2/5 Reeves Terrace	09/30/01	09/30/01	11/12/01				
FL 4-4 Lake Mann Homes	09/30/01	09/30/01	11/12/01				
FL 4-6 Murchison Terrace	09/30/01	09/30/01	11/12/01				
FL 4-9 Ivey Lane	09/30/01	09/30/01	11/12/01				
FL 4-10 Lorna Doone	09/30/01	09/30/01	11/12/01				
FL 4-11 Meadow Lake Apartments	09/30/01	09/30/01	11/12/01				
FL 4-12A Citrus Square	09/30/01	09/30/01	11/12/01				
FL 4-13 Omega Apartments	09/30/01	09/30/01	11/12/01				
FL 4-14 Marden Meadows	09/30/01	09/30/01	11/12/01				
Signature of Executive Director and Date <b>X</b>				Signature of Public Housing Director/Office of Native American Programs Administrator and Date <b>X</b>			

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement  
 (2) To be completed for the Performance and Evaluation Report.

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
	FL 4-2/5 Reeves Terrace	03/30/02	09/30/02		09/30/03		
FL 4-4 Lake Mann Homes	03/30/02	09/30/02		09/30/03			
FL 4-6 Murchison Terrace	03/30/02	09/30/02		09/30/03			
FL 4-9 Ivey Lane	03/30/02	09/30/02		09/30/03			
FL 4-11 Meadow Lake Apartments	03/30/02	09/30/02		09/30/03			
FL 4-12A Citrus Square	03/30/02	09/30/02		09/30/03			
FL 4-13 Omega Apartments	03/30/02	09/30/02		09/30/03			
FL 4-17 Hampton Park		9/30/02		09/30/03			
PHA WIDE							
Signature of Executive Director and Date <b>X</b>			Signature of Public Housing Director/Office of Native American Programs Administrator and Date <b>X</b>				
(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance and Evaluation Report.							

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
	FL 4-2/5 Reeves Terrace	12/31/02			06/30/04		
FL 4-4 Lake Mann Homes	12/31/02			06/30/04			
FL 4-6 Murchison Terrace	12/31/02			06/30/04			
FL 4-9 Ivey Lane	12/31/02			06/30/04			
FL 4-11 Meadow Lake Apartments	12/31/02			06/30/04			
FL 4-12A Citrus Square	12/31/02			06/30/04			
FL 4-13 Omega Apartments	12/31/02			06/30/04			
FL4-14 Marden Meadows	12/31/02			06/30/04			
PHA WIDE							
Signature of Executive Director and Date <b>X</b>				Signature of Public Housing Director/Office of Native American Programs Administrator and Date <b>X</b>			
(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance and Evaluation Report.							

**Annual Statement/Performance and Evaluation Report  
Comprehensive Grant Program (CGP) Part I: Summary**

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing  
OMB Approval No. 2577-0157 (Exp. 7/31/98)

HA Name <b>Orlando Housing Authority</b>	Comprehensive Grant Number FL29P004501-02 Annual Submission	FFY of Grant Approval 2002
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Original Annual Statement   
  Reserve for Disaster/Emergencies   
  Revised Annual Statement Number   
  Performance & Evaluation Report for Program Year Ending 12/31/01  
 Final Performance & Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations (May not exceed 10% of line 19)				
3	1408 Management Improvements	\$714,846.00			
4	1410 Administration	\$357,423.00			
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$100,000.00			
8	1440 Site Acquisition				
9	1450 Site Improvement	\$434,542.00			
10	1460 Dwelling Structures	\$820,000.00			
11	1465.1 Dwelling Equipment-Nonexpendable				
12	1470 Non-dwelling Structures	\$0.00			
13	1475 Non-dwelling Equipment	\$257,423.00			
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1495.1 Relocation Costs	\$50,000.00			
17	1499 Mod Used for Development	\$839,997.00			
18	1502 Contingency (may not exceed 8% of line 19)				
19	Amount of Annual Grant (Sum of lines 2-18)	\$3,574,231.00			
20	Amount of Line 16 related to LBP Activities				
21	Amount of Line 16 related to Section 504 Compliance				
22	Amount of Line 16 related to Security				
23	Amount of Line 16 Related to Energy Conservation				

Signature of Executive Director and Date X	Signature of Public Housing Director/Office of Native American Programs Administrator and Date X
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1- To be completed for the Performance and Evaluation Report or a Revised Annual Statement

2- To be completed for the Performance and Evaluation Report

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program (CF) Part I: Summary**

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

OMB Approval No. 2577-0157 (Exp. 7/31/98)

HA Name <b>Orlando Housing Authority</b>	Capital Plan Grant Number FL29P004501-01	FFY of Grant Approval 2001
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Original Annual Statement  
  Reserve for Disaster/Emergencies  
  Revised Annual Statement Number  
  Performance & Evaluation Report for Program Year Ending 12/31/01  
 Final Performance & Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGP Funds	\$0.00	\$0.00	\$0.00	\$0.00
2	1406 Operations (May not exceed 10% of line 19)	\$0.00	\$0.00	\$0.00	\$0.00
3	1408 Management Improvements	\$714,846.00	\$714,846.00	\$0.00	\$0.00
4	1410 Administration	\$357,423.00	\$357,423.00	\$357,423.00	\$0.00
5	1411 Audit	\$0.00	\$0.00	\$0.00	\$0.00
6	1415 Liquidated Damages	\$0.00	\$0.00	\$0.00	\$0.00
7	1430 Fees and Costs	\$100,000.00	\$100,000.00	\$0.00	\$0.00
8	1440 Site Acquisition	\$0.00	\$0.00	\$0.00	\$0.00
9	1450 Site Improvement	\$505,000.00	\$370,000.00	\$0.00	\$0.00
10	1460 Dwelling Structures	\$1,175,000.00	\$1,325,000.00	\$0.00	\$0.00
11	1465.1 Dwelling Equipent-Nonexpendable	\$0.00	\$0.00	\$0.00	\$0.00
12	1470 Non-dwelling Structures	\$15,000.00	\$0.00	\$0.00	\$0.00
13	1475 Non-dwelling Equipment	\$100,000.00	\$100,000.00	\$0.00	\$0.00
14	1485 Demolition	\$300,000.00	\$0.00	\$0.00	\$0.00
15	1490 Replacement Reserve	\$0.00	\$0.00	\$0.00	\$0.00
16	1495.1 Relocation Costs	\$100,000.00	\$100,000.00	\$0.00	\$0.00
17	1499 Mod Used for Development	\$0.00	\$300,000.00	\$0.00	\$0.00
18	1502 Contingency (may not exceed 8% of line 19)	\$206,962.00	\$206,962.00	\$0.00	\$0.00
19	Amount of Annual Grant (Sum of lines 2-18)	<b>\$3,574,231.00</b>	<b>\$3,574,231.00</b>	<b>\$357,423.00</b>	<b>\$0.00</b>
20	Amount of Line 16 related to LBP Activities	\$0.00	\$0.00	\$0.00	\$0.00
21	Amount of Line 16 related to Section 504 Compliance	\$0.00	\$0.00	\$0.00	\$0.00
22	Amount of Line 16 related to Security	\$0.00	\$0.00	\$0.00	\$0.00
23	Amount of Line 16 Related to Energy Conservation	\$0.00	\$0.00	\$0.00	\$0.00

Signature of Executive Director and Date X	Signature of Public Housing Director/Office of Native American Programs Administrator and Date X
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**Annual Statement/Performance and Evaluation Report  
Capital Fund Program (CF) Part I: Summary**

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

OMB Approval No. 2577-0157 (Exp. 7/31/98)

HA Name <b>Orlando Housing Authority</b>	Capital Plan Grant Number <b>FL29P004501-00</b>	FFY of Grant Approval 2000
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Original Annual Statement  
  Reserve for Disaster/Emergencies  
  Revised Annual Statement Number  
  Performance & Evaluation Report for Program Year Ending 09/30/01  
 Final Performance & Evaluation Report  
 Budget Revision #1

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGP Funds	\$0.00	\$0.00	\$0.00	\$0.00
2	1406 Operations (May not exceed 10% of line 19)	\$0.00	\$0.00	\$0.00	\$0.00
3	1408 Management Improvements	\$420,201.00	\$434,432.00	\$0.00	\$0.00
4	1410 Administration	\$363,757.00	\$349,526.00	\$349,526.00	\$0.00
5	1411 Audit	\$0.00	\$0.00	\$0.00	\$0.00
6	1415 Liquidated Damages	\$0.00	\$0.00	\$0.00	\$0.00
7	1430 Fees and Costs	\$100,000.00	\$50,000.00	\$0.00	\$0.00
8	1440 Site Acquisition	\$0.00	\$0.00	\$0.00	\$0.00
9	1450 Site Improvement	\$990,000.00	\$415,000.00	\$0.00	\$0.00
10	1460 Dwelling Structures	\$1,413,000.00	\$1,713,000.00	\$0.00	\$0.00
11	1465.1 Dwelling Equipment-Nonexpendable	\$0.00		\$0.00	\$0.00
12	1470 Non-dwelling Structures	\$0.00	\$0.00	\$0.00	\$0.00
13	1475 Non-dwelling Equipment	\$108,299.00	\$108,299.00	\$0.00	\$0.00
14	1485 Demolition	\$0.00	\$0.00	\$0.00	\$0.00
15	1490 Replacement Reserve	\$0.00	\$0.00	\$0.00	\$0.00
16	1495.1 Relocation Costs	\$100,000.00	\$100,000.00	\$0.00	\$0.00
17	1499 Mod Used for Development	\$0.00	\$325,000.00	\$0.00	\$0.00
18	1502 Contingency (may not exceed 8% of line 19)	\$0.00	\$0.00	\$0.00	\$0.00
19	Amount of Annual Grant (Sum of lines 2-18)	\$3,495,257.00	\$3,495,257.00	\$349,526.00	\$0.00
20	Amount of Line 16 related to LBP Activities	\$20,000.00	\$20,000.00	\$0.00	\$0.00
21	Amount of Line 16 related to Section 504 Compliance	\$0.00	\$0.00	\$0.00	\$0.00
22	Amount of Line 16 related to Security	\$0.00	\$0.00	\$25,000.00	\$25,000.00
23	Amount of Line 16 Related to Energy Conservation	\$0.00	\$0.00	\$0.00	\$0.00

Signature of Executive Director and Date X	Signature of Public Housing Director/Office of Native American Programs Administrator and Date X
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1- To be completed for the Performance and Evaluation Report or a Revised Annual Statement

2- To be completed for the Performance and Evaluation Report

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

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing  
OMB Approval No. 2577-0157 (Exp. 7/31/98)

HA Name <b>Orlando Housing Authority</b>	Comprehensive Grant Number FL29P00450100-03 (aka:CFP712)	FFY of Grant Approval 2003
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- Original Annual Statement   
 Reserve for Disaster/Emergencies   
 Revised Annual Statement Number   
 Performance & Evaluation Report for Program Year Ending  
 Final Performance & Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations (May not exceed 10% of line 19)				
3	1408 Management Improvements	\$714,846.00	\$714,846.00		
4	1410 Administration	\$357,423.00	\$357,423.00		
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$100,000.00	\$100,000.00		
8	1440 Site Acquisition				
9	1450 Site Improvement	\$1,193,997.00	\$1,219,539.00		
10	1460 Dwelling Structures	\$900,542.00	\$875,000.00		
11	1465.1 Dwelling Equipent-Nonexpendable				
12	1470 Non-dwelling Structures				
13	1475 Non-dwelling Equipment	\$257,423.00	\$257,423.00		
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1495.1 Relocation Costs	\$50,000.00	\$50,000.00		
17	1498 Mod Used for Development				
18	1502 Contingency (may not exceed 8% of line 19)				
19	Amount of Annual Grant (Sum of lines 2-18)	\$3,574,231.00	\$3,574,231.00		
20	Amount of Line 16 related to LBP Activities				
21	Amount of Line 16 related to Section 504 Compliance				
22	Amount of Line 16 related to Security				
23	Amount of Line 16 Related to Energy Conservation				

Signature of Executive Director and Date X	Signature of Public Housing Director/Office of Native American Programs Administrator and Date X
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