

# PHA Plans

5-Year Plan for Fiscal Years 2002 - 2006  
Annual Plan for Fiscal Year 2002

**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: Housing Authority of the City of Beaumont, Texas**  
**PHA Number: TX023**

**PHA Fiscal Year Beginning: (October 1, 2002)**

**Public Access to Information**

**Information regarding any activities outlined in this plan can be obtained by contacting:**

**Main administrative office of the PHA**

4925 Concord Road  
Beaumont, Texas 77708  
(409) 899-5055

**PHA development management offices**

Concord Homes  
2020 Cottonwood  
Beaumont, Texas 77703  
(409) 784-3984

Magnolia Gardens  
3710 Magnolia  
Beaumont, Texas 77703  
(409) 784-3993

Grand Pine  
2835 Texas Street  
Beaumont, Texas 77703  
(409) 784-3980

Lucas Gardens  
3795 E. Lucas  
Beaumont, Texas 77708  
(409) 899-8421

Northridge Manor  
4155 Maida  
Beaumont, Texas 77708  
(409) 899-8417

Tracewood I  
4075 Arthur  
Beaumont, Texas 77708  
(409) 899-8442

Tracewood II  
4935 Concord  
Beaumont, Texas 77708  
(409) 899-8442

**PHA local offices:**

4925 Concord Road  
Beaumont, Texas  
(409) 899-5055

## Display Locations For PHA Plans and Supporting Documents

The PHA Plans (including attachments) are available for public inspection at:

**Main administrative office of the PHA:**

4925 Concord Road  
Beaumont, Texas 77708  
(409) 899-5055

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3795 E. Lucas  
Beaumont, Texas 77708  
(409) 899-8421

Each Resident Council is also provided a copy of the PHA Plan with all the supporting documents.

Northridge Manor  
4155 Maida  
Beaumont, Texas 77708  
(409) 899-8417

Tracewood I  
4075 Arthur  
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(409) 899-8442

**PHA local offices:**

Beaumont Housing Authority  
4925 Concord Road  
Beaumont, Texas 77708  
(409) 899-5055

**Main administrative office of the local government:**

City of Beaumont  
801 Main Street  
Beaumont, Texas 77701  
(409) 880-3755

**Main administrative office of the County government:**

Jefferson County Courthouse  
1149 Pearl Street  
Beaumont, Texas 77701  
(409) 835-8400

**Public library:**

Beaumont Public Library  
800 Pearl  
Beaumont, Texas 77701  
(409) 838-6606

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# **5-YEAR PLAN**

## **PHA FISCAL YEARS 2002 - 2006**

[24 CFR Part 903.5]

### **A. Mission**

The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.

### **Goals**

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

BHA Goal: Expand the supply of assisted housing

Objectives:

FY2002-2003 – Establish plan to develop homeownership opportunities utilizing Section 8 Homeownership Vouchers

FY2002-2003 – Utilize proceeds from sale of 5H properties to obtain additional houses for Homeownership as well as Section 8 Housing.

BHA Goal: Improve the quality of assisted housing

Objectives:

Continue to implement process and procedures for improving maintenance and inspections on existing housing.

BHA Goal: Increase assisted housing choices

Objectives:

Maintain at least 97% Utilization in the Housing Choice Voucher Program

Increase marketing efforts to increase the utilization of Desegregated Housing Opportunity Vouchers. Maximize the availability of ACC (PHA owned) units by maximizing the occupancy rate of the units.

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

BHA Goal: Provide an improved living environment

Objectives:

Improve unit and site maintenance in order to attract higher income level families.

Complete the rehabilitation of Concord Homes and implement strong lease enforcement and security enforcement in order to insure a clean, safe neighborhood environment.

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

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

Objectives:

Increase participation in the Family Self-Sufficiency Program.

Attempt to obtain Network Neighborhood funding in order to increase training and educational opportunities to Public Housing Residents.

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

PHA Goal: Ensure equal opportunity and affirmatively further fair housing

Objectives:

Admissions and Waiting Lists will be managed without regard to race, color, religion, national origin, sex, familial status, and disability.

Strategies will be implemented to improve desegregated housing opportunities (DHO) throughout the non-impacted areas of Beaumont.

Complete the renovation and occupancy of the 150 Scattered Site houses that replaced the Neches Park Development.

Improve the occupancy rate of the PHA owned Low Rent Housing units to ensure the availability of the units.

# **Annual PHA Plan**

## **PHA Fiscal Year 2002-2003**

[24 CFR Part 903.7]

### **Annual Plan Type:**

#### **Standard PHA Plan:**

**Standard Performing PHA**

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

[24 CFR Part 903.7 9 (r)]

The Beaumont Housing Authority (BHA) has developed a Five-Year/Annual Plan in consolidation with local government officials and residents of BHA developments to meet low-income housing needs and to provide resident programs and services. This document presents the BHA's goals and objectives for a better quality of life for public housing residents in Beaumont, Texas.

The BHA Five-Year Plan for Fiscal Year 2002 - 2006 general scope of work can be described as the overall mission of the authority, which is to ensure the provision of affordable housing opportunities to include communities for lower income households.

The Annual Plan for Fiscal Year 2002 will be utilized as the primary source for modernization funds for construction improvement throughout the BHA, for increasing housing stock and for setting benchmarks for the management and operational practices.

The primary purpose of this Five-Year/Annual Plan is to evaluate and analyze quantitative goals and objectives that include the review of increased availability of affordable housing by ensuring additional Section 8 units are available for qualified individuals. Also included are plans to improve community quality of life by bringing higher income public households into lower income developments. In addition, BHA will undertake affirmative measures to provide self-sufficiency and to ensure equal opportunity in housing.

Residents of Beaumont public housing represent 1.8% of the city's population. Because of their limited income, these residents look to BHA for a decent place to live at a rent they can afford. BHA also provides facilities and other resources to public and private agencies offering resident supportive services, health care, education, recreation, child development, employment, public assistance and counseling.

In order to increase the number of Working Families residing in Beaumont Housing Authority, the Housing Authority will investigate remedies such as preferences and opportunities to cause families to increase their interest in moving to work. The Housing Authority, through its Family Self-Sufficiency Programs, will continue to encourage and provide incentives for not only establishing employment within families, but also increase opportunities through improved skills, education, and mentoring programs.

Homeownership programs will continue to be enhanced in order to provide additional opportunities for low-income families to take advantage of homeownership opportunities. These programs will be coordinated with the Family Self-Sufficiency as well as the Scattered Site Programs in order to insure compatibility and equal opportunities for all Housing Authority Residents.

BHA manages approximately 726 public and scattered site units. The following table explains BHA targeted developments to benefit from Five-Year/Annual Plan benchmarks:

<u>Development</u>	<u>Units</u>	<u>Status</u>
1) TX023-P003 - Concord Homes	100	Family
2) TX023-P0042 - Grand Pine	94	Elderly/Disabled
3) TX023-P0041- Lucas Gardens	56	Elderly/Disabled
4) TX023-P002 - Magnolia Gardens	195	Family
5) TX023-P005 – Tracewood I	24	Family
6) TX023-P005-2 - Tracewood II	53	Family
7) TX024-023-011 - Scattered Sites	100	Family
8) TX023-013- Scattered Sites II	50	Family
9) TX023-009- Homeownership	43	Family

# Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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## **Attachments**

### Required Attachments:

Admissions and Continued Occupancy Policy  
FY 2002 Capital Fund Program Annual Statement  
Section 8 Administration Plan

### Optional Attachments:

FY 2002 Capital Fund Program 5 Year Action Plan  
Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)  
2002 Income Limits  
2002 Flat Rates  
2002 Tenant Charges

**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>
	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	5 Year and Annual Plans
N/A	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public Housing Deconcentration and Income Mixing Documentation: PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and A & O Policy – Pg. 53	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents X check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies check here if included in Section 8 Administrative X Plan	Annual Plan: Rent Determination

X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures X check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures X check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
N/A	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
X	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
X	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
X	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program Check here ___ if included in the Section 8 Admin Plan	Annual Plan: Homeownership
X	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
	The most recent Public Housing Drug Elimination Program (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(Specify as needed)

# **1. Statement of Housing Needs**

[24 CFR Part 903.7 9 (a)]

## **Need for Affordable Housing in the Community**

The current population of the City of Beaumont is approximately 114,000 people. The units that were offered for rent to low to moderate-income families represent less than 1/10th of 1%. The 2000 Census reported 48,815 total housing units in the City of Beaumont. Of these housing units, 91% were occupied. Owner occupied units comprise 60% of the occupied units, while renter occupied units comprise 40% of such units.

There are fewer and fewer houses on the existing market that are both suitable and affordable for low and moderate-income persons. Most of the newly constructed housing is only for those in the middle to high-income range. This lessens the number of homes available for low and moderate-income persons.

Similarly, there is a shortage of affordable rental housing. From 1985 to 1996 in the City of Beaumont, there was only one apartment complex of significant size constructed. Many of the older units have deteriorated, leaving fewer adequate structures available for rent. Occupancy rates are generally fairly high for rental properties.

Zoning is also an obstacle to housing choice. Many of the more affordable properties in the city are not zoned for residential uses. In addition, it was found that the city has a shortage of rental housing. This also affects overall housing choice in the city.

Properties in the west end of Beaumont are considerably more expensive than those in its east side. The majority of the western half is zoned residential single-family. This part of the city is the most restrictive residential district. These areas are protected from higher density residential development and from the encroachment of incompatible uses. However, much of the property on the city's east side which is less developed is zoned Residential Multi-family High density (RM-H), General Commercial Multi-family (GC-MD), Light Industrial (LI), and Heavy Industrial (HI). (Reported by the City of Beaumont Planning and Zoning Department).

There are other areas of the city with older housing stock. One of these areas that has few uses of a commercial or industrial nature is the northeast side. Generally, land on this side of the city is considerably cheaper than that on the west side. Much of it is zoned other than single family. This makes residential development of such property difficult. It may also affect individual housing choices in that housing opportunities are not as prevalent in these areas. The Beaumont Housing Authority operates the following housing programs:

<b>Program</b>	<b>Units</b>
Low-rent housing	759
Section 8 Housing Choice Vouchers	1750
Section 8 Moderate Rehabilitation	138
Section 8 New Construction	150

Of the 48,815 housing units in Beaumont, Section 8 Housing Choice Vouchers comprise 3.6%. Low-rent housing comprises 1.5%. Section 8 Moderate Rehabilitation comprises .3%, and Section 8 New Construction comprises .3%. Based on these statistics, the Housing Authority serves only 5.7% of the total 48,815 housing units addressing the housing needs for the low-income families.

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

<b>Low Rent &amp; Section 8 Residents Housing Needs of Families in the Jurisdiction by Family Type</b>							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ability	Size	Location
Income <= 30% of AMI	5,861	4	5	5	4	3	3
Income >30% but <=50% of AMI	2,874	3	4	3	3	2	3
Income >50% but <80% of AMI	2,734	2	2	2	2	2	2
Elderly	5,890	4	4	4	4	1	2
Families with Disabilities	5,649	4	4	4	3	2	3
Race/Ethnicity/ BK	21,132	4	4	4	3	2	3
Race/Ethnicity /H	3,611	4	4	4	3	3	3
Race/Ethnicity/ Others	3,490	4	4	4	3	3	3
Race/Ethnicity	N/A						

What sources of information did the PHA use to conduct this analysis?

General Demographic Characteristics: 2000 Census  
Table DP-1; DP-3; DP-4

**A2. Housing Needs of Families on the Public Housing and Section 8 Tenant-Based Assistance Waiting Lists**

<b>Housing Needs of Families on the Waiting List</b>			
Waiting list type: Combined Section 8 and Public Housing			
	# of families	% of total families	Annual Turnover
Waiting list total	2182	100	
Extremely low income <=30% AMI	1878	86%	N/A
Very low income (>30% but <=50% AMI)	256	12%	N/A
Low income (>50% but <80% AMI)	48	2%	N/A
Families with children	1323	61%	N/A
Elderly families	70	3.2%	N/A
Families with Disabilities	27	1%	N/A
Race/ethnicity/BK	1890	86.5%	N/A
Race/ethnicity/H	5	.1%	N/A
Race/ethnicity/ Other	7	.1%	N/A
Race/ethnicity/W	282	13%	N/A
Characteristics by Bedroom Size (Public Housing Only)			
1BR	478		
2 BR	448		
3 BR	180		
4 BR	14		
5 BR	0		
5+ BR	0		
Is the waiting list closed? No			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? No (Always Open)			

## C. Strategy for Addressing Needs

### (1) Strategies

#### **Need: Shortage of affordable housing for all eligible populations**

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

Maintaining Section 8 lease-up rates by marketing the program to owners, particularly those outside areas of minority and poverty concentration

Maintaining Section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of the program

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

Leverage affordable housing resources in the community through the creation of mixed-finance housing

Use existing funds to provide Section 8 assistance and scattered site properties in non-impacted areas.

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

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

Target HUD federal requirements for families at or below 30% of AMI for public housing and Section 8 assistance.

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

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

Employ admissions preferences aimed at families who are working

Establish eligibility criteria in Homeownership programs aimed at this level of income

#### **Need: Specific Family Types: The Elderly**

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

Apply for special-purpose vouchers targeted to the elderly if they become available

Continue to provide designated Staff to work with elderly residents

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

Continue to provide designated Staff to work with disabled residents

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

Apply for special-purpose vouchers targeted to the families with disabilities, should they become available.

Carry out the modifications needed in public housing based on the Section 504 Needs Assessment for Public Housing

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

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

Counsel Section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units

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

Market the Section 8 program to owners outside of areas of poverty /minority concentrations

**Other Housing Needs & Strategies:**

NONE

**3. 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

Limited availability of sites for assisted housing

Staffing constraints

Influence of the housing market on PHA programs

Desegregation Housing Initiatives implemented by HUD

## Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2002 grants)</b>		
1.Public Housing Operating Fund	1,818,358.00	---
2.Public Housing Capital Fund - 2002	1,151,471.00	---
3.HOPE VI Revitalization	---	---
4.HOPE VI Demolition	---	---
5.Annual Contributions for Section 8 Tenant-Based Assistance	13,613,854.00	---
6.Public Housing Drug Elimination Program (including any Technical Assistance funds) 2002	0.00	
7.Resident Opportunity and Self-Sufficiency Grants	0.00	---
8.Community Development Block Grant	0.00	---
9.HOME	0.00	
Other Federal Grants (list below)		
a) Section 8 New Construction HAP	734,076.00	
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
Development	0.00	
Development	0.00	
Development	0.00	
2001 Capital Fund Grant	366,750.00	Modernization
<b>3. Public Housing Dwelling Rental Income</b>		
Excess Utilities	846,120.00	
Other	0.00	
	16,000.00	
<b>4. Other income (list below)</b>		
Investment Interest	20,000.00	
<b>5. Non-federal sources (list below)</b>		
BHA Owned Properties	23,400.00	
<b>Total resources</b>	<b>18,590,029.00</b>	

3. PHA Policies Governing Eligibility, Selection, and Admissions  
[24 CFR Part 903.7 9 (c)]

## **A. Public Housing**

### **(1) Eligibility**

- a. When does the PHA verify eligibility for admission to public housing?

When they're pulled for orientation

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

Criminal or drug-related activity

Rental history

Housekeeping

- c. Does the PHA request criminal records from local law enforcement agencies for screening purposes?

Yes

- d. Does the PHA request criminal records from State law enforcement agencies for screening purposes?

Yes, via Internet

- e. Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

No

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

- a. Which methods does the PHA plan to use to organize its public housing waiting list?

Date and Time of Application from community-wide list

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

Admissions office – 3805 E. Lucas, Beaumont, Texas

- 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?

None

2. 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?

None

3. May families be on more than one list simultaneously? If yes, how many lists?

Not applicable

4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists?

Not applicable

**(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?

One

- b. Is this policy consistent across all waiting list types?

Yes

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

Not applicable

**(4) Admissions Preferences**

- a. Income targeting:

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?

No

- b. Transfer policies:

In what circumstances will transfers take precedence over new admissions?

Emergencies

Over housed

Under housed

Medical justification

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

Safety

- c. Preferences

1. Has the PHA established preferences for admission to public housing (other than date and time of application)?

Yes

2. Which of the following admission preferences does the PHA plan to employ in the coming year?

Homeownership Program for Eligible Applicants  
Scattered Site Selection Preference

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

Date and Time	1
Homeownership	2
Scattered Sites	2

4. Relationship of preferences to income targeting requirements:

Homeownership and Scattered Site preference is based on income level

**(5) Occupancy**

- a. What reference materials can applicants and residents use to obtain information about the rules of occupancy of public housing?

The PHA-resident lease  
The PHA's Admissions and (Continued) Occupancy policy  
PHA briefing seminars or written materials  
Resident Handbook

- b. How often must residents notify the PHA of changes in family composition?

At an annual re-examination and lease renewal  
Any time family composition changes  
At family request for revision

**(6) Deconcentration and Income Mixing**

- a. Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?

Yes

- b. Did the PHA adopt any changes to its admissions policies based on the results of the required analysis of the need to promote deconcentration of poverty or to assure income mixing?

Yes

- c. If the answer to b was yes, what changes were adopted?

Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments  
If selected, list targeted developments below:

All low rent housing sites

- d. Did the PHA adopt any changes to other policies based on the results of the required analysis of

the need for deconcentration of poverty and income mixing?

Yes

- e. If the answer to “d” were yes, how would you describe these changes?

Actions to improve the marketability of certain developments  
Adoption or adjustment of ceiling rents for certain developments

- 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?

List (any applicable) developments below:

All low rent housing sites

- 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?

List (any applicable) developments below:

All low rent housing sites

## **B. Section 8**

### **(1) Eligibility**

- a. What is the extent of screening conducted by the PHA?

Criminal or drug-related activity only to the extent required by law or regulation

- b. Does the PHA request criminal records from local law enforcement agencies for screening purposes?

Yes

- c. Does the PHA request criminal records from State law enforcement agencies for screening?

Pending

- d. Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

No

- e. Indicate what kinds of information you share with prospective landlords?

Criminal or drug-related activity

**(2) Waiting List Organization**

a. With which of the following program waiting lists is the Section 8 tenant-based assistance waiting list merged?

Federal moderate rehabilitation

b. Where may interested persons apply for admission to Section 8 tenant-based assistance?

Admissions – 3805 E. Lucas, Beaumont, Texas

**(3) Search Time**

a. Does the PHA give extensions on standard 60-day period to search for a unit?

Yes

If yes, state circumstances below:

If an applicant has not located a suitable unit due to medical reasons and where client documents extensive search activity

**(4) Admissions Preferences**

a. Income targeting

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?

No

b. Preferences

1. 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**)

Yes      Desegregation Housing Opportunities (DHO)

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)

N/A

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.

N/A

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

N/A

5. If the PHA plans to employ preferences for “residents who live and/or work in the jurisdiction”

Not applicable

6. Relationship of preferences to income targeting requirements:

Not applicable

#### **(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?

The Section 8 Administrative Plan  
Briefing sessions and written materials  
Outreach

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

Through published notices  
Letters to all applicants

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

[24 CFR Part 903.7 9 (d)]

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

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

- a. Use of discretionary policies:

The PHA does not employ discretionary policies for determining income-based rent

- b. Minimum Rent

1. What amount best reflects the PHA’s minimum rent?

\$50

2. Has the PHA adopted any discretionary minimum rent hardship exemption policies?

Yes

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

Financial hardships

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

No

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

- (a) Earned income for previously unemployed household members
- (b) Incremental earnings resulting from government funded training

e. Ceiling rents

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

Yes

2. For which kinds of developments are ceiling rents in place?

For all developments

3. Select the space or spaces that best describe how you arrive at ceiling rents

Fair market rents (FMR)  
95<sup>th</sup> percentile rents

f. Rent re-determinations:

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

Any time the family experiences an income increase  
Change of family composition and decrease in income

g. 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?

No

**(2) Flat Rents**

In setting the market-based flat rents, what sources of information did the PHA use to establish comparability?

Survey of similar unassisted units in the neighborhood  
Operating costs

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

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

- a. What is the PHA's payment standard?

110% of FMR – impacted areas

112% of FMR – non-impacted areas for non-class members

142% of FMR – non-impacted areas for class members (Desegregated Housing Opportunities -DHO)

- b. If the payment standard is lower than FMR, why has the PHA selected this standard?

N/A

- c. If the payment standard is higher than FMR, why has the PHA chosen this level?

Exception rents for non-impacted areas (DHO)

To increase housing options for families

- d. How often are payment standards reevaluated for adequacy?

Annually

- e. What factors will the PHA consider in its assessment of the adequacy of its payment standard?

Success rates of assisted families

Marketability requirements to attract landlords in non-impacted areas

### **(2) Minimum Rent**

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

\$50

- b. Has the PHA adopted any discretionary minimum rent hardship exemption policies?

Yes, when a resident has an unforeseen emergency due to loss of eligibility or waiting for Federal, state or local assistance program. (Details in the ACOP)

## **5. Operations and Management**

[24 CFR Part 903.7 9 (e)]

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

An organization chart showing the PHA's management structure and organization is attached.

### **B. HUD Programs Under PHA Management**

<b>Program Name</b>	<b>Units or Families Served at Year Beginning</b>	<b>Expected Turnover</b>
Public Housing	609	120
Section 8 Vouchers	1,750	120
Section 8 Mod Rehab	138	25
Special Purpose Section 8 Certificates/Vouchers (list individually)	Family Unification 0	0
ROSS	Lucas Garden Grand Pine	
Section 8 New Construction	Northridge 150	
Other Federal Programs (list individually)		

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

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

- a. Beaumont Housing Authority's Maintenance Manual.
- b. Admissions and Occupancy Policies Manual

(2) Section 8 Management: (list below)

Section 8 Administrative Plans

### **3. PHA Grievance Procedures**

[24 CFR Part 903.7 9 (f)]

#### **4. Public Housing**

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?

No

2. Which PHA office should residents or applicants to public housing contact to initiate the PHA grievance process?

PHA main administrative office

PHA development management offices

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

1. 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? No
2. Which PHA office should applicants or assisted families contact to initiate the informal review and informal hearing processes?

Section 8 Department

### **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 Table Library

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

- a. Yes 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 below: (if selected, copy the CFP optional 5 Year Action Plan from the Table Library and insert here)

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

- a) Has the PHA received a HOPE VI revitalization grant? No

(if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary) No

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

1. Development name:
2. Development (project) number:
3. Status of grant: (select the statement that best describes the current status)
  - Revitalization Plan under development
  - Revitalization Plan submitted, pending approval
  - Revitalization Plan approved
  - Activities pursuant to an approved Revitalization Plan underway

c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year? Yes

If yes, list development name/s below:

Magnolia Gardens

d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year? No

If yes, list developments or activities below:

e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement? No

If yes, list developments or activities below:

## **5. Demolition and Disposition**

[24 CFR Part 903.7 9 (h)]

1. 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? Yes (If "No", skip to component 9; if "yes", complete one activity description for each development.)

2. Activity Description

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.) No

<b>Demolition/Disposition Activity Description</b>
1a. Development name: Magnolia Gardens
1b. Development (project) number: TX023P002
2. Activity type: Hope VI Revitalization Grant
3. Application status: Planning status
4. Date application approved, submitted, or planned for submission: 2003 Hope VI Grant year
5. Number of units affected:
6. Coverage of action Undetermined
7. Timeline for activity: 2003-2004
a. Actual or projected start date of activity: 11/02
b. Projected end date of activity- 12/2002 11/04

## **6. Designation of Public Housing for Occupancy by Elderly Families or**

**Families with Disabilities or Elderly Families and Families with Disabilities**

[24 CFR Part 903.7 9 (i)]

1. 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? *No*

2. Activity Description

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. *No*

<b>Designation of Public Housing Activity Description</b>
1a. Development name Lucas Gardens and Grand Pine Courts 1b. Development (project) number:TX023-004
2. Designation type: Occupancy by only the elderly
3. Application status  Planned application
4. Date this designation approved, submitted, or planned for submission: ( )
5. If approved, will this designation constitute a revision of a previously-approved Designation Plan? <i>No</i>
1.Number of units affected: 150 7. Coverage of action Part of the development Total developments: 2

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

[24 CFR Part 903.7 9 (j)]

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

1. 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.) *No*

2. Activity Description

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.

*No*

<b>Conversion of Public Housing Activity Description</b>
--

1a. Development name: 1b. Development (project) number:
2. What is the status of the required assessment? Assessment underway Assessment results submitted to HUD Assessment results approved by HUD (if marked, proceed to next question) Other (explain below)
3. Yes No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to block 5.)
4. Status of Conversion Plan (select the statement that best describes the current status) Conversion Plan in development Conversion Plan submitted to HUD on: (DD/MM/YYYY) Conversion Plan approved by HUD on: (DD/MM/YYYY) Activities pursuant to HUD-approved Conversion Plan underway
5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one) Units addressed in a pending or approved demolition application (date submitted or approved: Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: ) Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: Requirements no longer applicable: vacancy rates are less than 10 percent Requirements no longer applicable: site now has less than 300 units Other: (describe below)

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

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

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

[24 CFR Part 903.7 9 (k)]

**A. Public Housing**

1. 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.) Yes

2. Activity Description

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.) No

<b>Public Housing Homeownership Activity Description (Complete one for each development affected)</b>
---

1a. Development name: Beaumont on the Grow
1b. Development (project) number: TX024P009
2. Federal Program authority:  Turnkey III
3. Application status: (select one) Approved; included in the PHA's Homeownership Plan/Program
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: (6/1996)
1. Number of units affected: 57
6. Coverage of action:  Total development – scattered sites

## B. Section 8 Tenant Based Assistance

1. 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

Will the PHA limit the number of families participating in the Section 8 homeownership option? Not Applicable

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

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:

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

[24 CFR Part 903.7 9 (1)]

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

1. Cooperative agreements:

Yes Has the PHA 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? 09/02/92

2. Other coordination efforts between the PHA and TANF agency

Client referrals

Information sharing regarding mutual clients (for rent determinations and otherwise)  
 Coordinate the provision of specific social and self-sufficiency services and programs to eligible families

Jointly administer programs

Joint administration of other demonstration program

**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

Preference/eligibility for public housing homeownership option participation

b. Economic and Social Self-sufficiency programs

Yes 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>Services and Programs</b>				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)
Scattered Sites	29	Waiting List	Admissions Office	Public Housing
Home Ownership	38	Waiting List	Admissions Office	Public Housing
Mandatory Training		Specific criteria	Admissions Office	Public Housing

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

a. Participation Description

<b>Family Self Sufficiency (FSS) Participation</b>		
Program	Required Number of Participants (start of FY 2002 Estimate)	Actual Number of Participants (As of: DD/MM/YY)
Public Housing	0	36 –5/30/02
Section 8	25	29—5/30/02

- b. Yes 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

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

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

**13. PHA Safety and Crime Prevention Measures**

[24 CFR Part 903.7 9 (m)]

Exemptions from Component 13: High performing and small PHAs not participating in PHDEP and Section 8 Only PHAs may skip to component 15. High Performing and small PHAs that are participating in PHDEP and are submitting a PHDEP Plan with this PHA Plan may skip to sub-component D.

**A. Need for measures to ensure the safety of public housing residents**

1. Describe the need for measures to ensure the safety of public housing residents

Local crime statistics indicate need for security services at the large BHA family developments (Northridge, Concord & Magnolia Gardens)

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

Resident reports

PHA employee reports

3. Which developments are most affected?

Family Developments

### **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:

Contracting with outside and/or resident organizations for the provision of crime- and/or drug-prevention activities

Activities targeted to at-risk youth, adults, or seniors  
Volunteer Resident Patrol/Block Watchers Program

2. Which developments are most affected?

All developments

### **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:

Police involvement in development, implementation, and/or ongoing evaluation of drug-elimination plan

Police have established a physical presence on housing authority property (e.g., community policing office, officer in residence)

Police sub-stations are established at Magnolia Gardens and Concord Homes

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 and extra patrols.

Other activities:

Police substations

Police attend resident council meetings

2. Which developments are most affected?

All developments

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

PHAs eligible for FY 2002 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

PHDEP Not Applicable in 2002

**14. RESERVED FOR PET POLICY**

[24 CFR Part 903.7 9 (n)]

In Admissions and Continued Occupancy Policy

**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 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 Was the most recent fiscal audit submitted to HUD?
- 3. Yes Were there any findings as the result of that audit?
- 4. Yes If there were any findings, do any remain unresolved?  
If yes, how many unresolved findings remain? 2
- 5. No: Have responses to any unresolved findings been submitted to HUD?  
If not, when are they due? HUD has not monitored or requested response;  
BHA has cleared most findings

**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. 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

3. 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. 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)

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

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

1. 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. No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)

3. Description of Resident Election Process

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

Other: (describe)

Mayor appointed.

b. Eligible candidates: (select one)

Any head of household receiving PHA assistance

c. Eligible voters: (select all that apply)

Other (list)

Mayor appointment only

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

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

D.

1. Consolidated Plan jurisdiction: (provide name here)

City of Beaumont

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

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

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

**D. Other Information Required by HUD**

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



# PHA Plan Table Library

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

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

Capital Fund Grant Number      FFY of Grant Approval: (10/2002)

Original Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	40,043.00
3	1408 Management Improvements	190,000.00
4	1410 Administration	99,928.00
5	1411 Audit	0.00
6	1415 Liquidated Damages	0.00
7	1430 Fees and Costs	50,000.00
8	1440 Site Acquisition	0.00
9	1450 Site Improvement	156,000.00
10	1460 Dwelling Structures	400,500.00
11	1465.1 Dwelling Equipment-Nonexpendable	70,000.00
12	1470 Nondwelling Structures	85,000.00
13	1475 Nondwelling Equipment	40,000.00
14	1485 Demolition	0.00
15	1490 Replacement Reserve	0.00
16	1492 Moving to Work Demonstration	0.00
17	1495.1 Relocation Costs	20,000.00
18	1498 Mod Used for Development	0.00
19	1502 Contingency	0.00
20	<b>Amount of Annual Grant (Sum of lines 2-19)</b>	<b>1,151,471.00</b>
21	Amount of line 20 Related to LBP Activities	0.00
22	Amount of line 20 Related to Section 504 Compliance	0.00
23	Amount of line 20 Related to Security	90,000.00
24	Amount of line 20 Related to Energy Conservation Measures	0.00

**Annual Statement**

**Capital Fund Program (CFP) Part II: Supporting Table**

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
Agency-Wide Administration	Operating Costs	1406	40,043.00
Agency-Wide Administration	Program Director, Clerk of the Works	1410	32,000.00
	Staff Training	1410	58,000.00
	Benefits	1410	9,928.00
	TOTAL		99,928.00
Fees and Costs (A&E)	A/E Services	1430	50,000.00
Agency-Wide Management Improvements	Security Guards, Mod Coordinator	1408	50,000.00
	Rent Collection, Resident Screening	1408	10,000.00
	Econ Dev/Job Training	1408	5,000.00
	Tenant Patrols	1408	30,000.00
	Lighting & Defensible Space	1408	10,000.00
	Resident Council Assistance	1408	10,000.00
	Management Training	1408	75,000.00
	TOTAL	1408	190,000.00

**Table Library**

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated
Agency-Wide	Tools, Equipment, Vehicles	1475	25,000.00
Agency-Wide	Relocation Costs	1495.1	20,000.00
	<b>TOTAL AGENCY-WIDE</b>		<b>424,971.00</b>
<b>Magnolia Gardens TX24P023-002</b>	Site: Landscaping, Sidewalks, Parking, Curbs, Playgrounds	1450	40,000.00
	Building Exterior: Siding, Screen Doors, Screens, Roofs	1460	10,000.00
	Dwelling Units: Vent Hoods, Tub Surround Flooring, Water Heaters, Cabinets, Plumbing Fixtures, Toilets, Light Fixtures	1460	29,000.00
	Dwelling Equipment: Ranges, Refrigerators Total	1465.1	16,000.00
	Site-Wide Facilities: Community Room Remodel	1470	15,000.00
	Non-dwelling Equipment: Tables, Chairs, Tools	1475	5,000.00
	<b>TOTAL MAGNOLIA GARDENS</b>		<b>115,000.00</b>
<b>Concord Homes TX24P023-003</b>	Site: Landscape, Playground, Fencing	1450	50,000.00
	<b>TOTAL CONCORD HOMES</b>		<b>50,000.00</b>

**Table Library**

<b>TX023-004 Lucas Gardens &amp; Grand Pine</b>	Site: Landscaping, Sidewalks, Curbs, Parking, Benches/Tables, Gazebo	1450	50,000.00
	Building Exterior: Roofs, Siding	1460	175,000.00
	Dwelling Units: Paint, A/C Units, Ceiling Fans, Water Heaters, Security Peep Holes, Porch Lights, Floors, Toilets, Hand Rails, Emergency Alarm Bells	1460	150,000.00
	Dwelling Equipment: Ranges, Refrigerators	1465.1	13,000.00
	Site-Wide Facilities: Community Room Remodel	1470	70,000.00
	Nondwelling Equipment: Tables, Chairs, Tools, Equipment	1475	10,000.00
	<b>TOTAL LUCAS GARDENS/GRAND PINE</b>		<b>468,000.00</b>
<b>TX023-005 Tracewood I &amp; II</b>	Site: Landscaping, Fencing, Sidewalks, Parking, Curbs, Playground	1450	10,000.00
	Building Exterior: Siding, Roofs	1460	13,000.00
	Dwelling Units: Cabinets, Paint, Floors, Doors, Stairs	1460	12,000.00
	Dwelling Equipment: Ranges, Refrigerators	1465.1	8,000.00
	<b>TOTAL TRACEWOOD I &amp; II</b>		<b>43,000.00</b>

**Table Library**

<b>TX023-011 Scattered Sites</b>	Site: Landscape, Sidewalks, Curbs, Driveways	1450	4,000.00
	Building Exterior: Siding, Roofs	1460	3,000.00
	Dwelling Units: Cabinets, Water Heaters, Flooring, Doors, A/C Units	1460	3,000.00
	Dwelling Equipment: Ranges, Refrigerators, Washers, Dryers	1465.1	20,000.00
	<b>TOTAL SCATTERED SITES – 011</b>		<b>30,000.00</b>
<b>TX023-013 Scattered Sites</b>	Site: Landscape, Sidewalks, Curbs, Driveways	1450	1,000.00
	Building Exterior: Roofs, Siding	1460	1,000.00
	Dwelling Units: Water Heaters, Flooring, Cabinets, Doors, A/C. Units	1460	1,000.00
	Dwelling Equipment: Ranges, Refrigerators, Washers, Dryers	1465.1	12,000.00
	<b>TOTAL SCATTERED SITES – 013</b>		<b>15,000.00</b>
<b>TX023-009 Homeownership</b>	Site: Landscape, Fencing, Sidewalks, Curbs, Driveways	1450	1,000.00
	Building Exterior: Siding, Roofs	1460	2,500.00
	Dwelling Units: Floors, Cabinets, Doors, Plumbing, A/C Units	1460	1,000.00
	Dwelling Equipment: Ranges, Refrigerators, Washers, Dryers	1465.1	1,000.00
	<b>TOTAL HOMEOWNERSHIP</b>		<b>5,500.00</b>

**Table Library**

**Annual Statement**

**Capital Fund Program (CFP) Part III: Implementation Schedule**

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)	All Funds Expended (Quarter Ending Date)
Operating Costs	03/31/03	09/30/03
Management Improve	03/31/04	09/30/04
Administration	03/31/04	09/30/04
Fees and Costs	06/30/04	03/31/05
TX023-002	09/30/03	09/30/04
TX023-003	09/30/04	09/30/05
TX023-004	09/30/03	09/30/04
TX023-005	09/30/03	09/30/04
TX023-011	09/30/04	09/30/06
TX023-013	09/30/04	09/30/06
TX023-009	09/30/04	09/30/06

**Table Library**

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

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

<b>Optional 5-Year Action Plan Tables</b>				
<b>Development Number</b>	<b>Development Name (Or indicate PHA wide)</b>	<b>Number Vacant Units</b>	<b>% Vacancies In Development</b>	
	HA-Wide			
<b>Description of Needed Physical Improvements or Management Improvements</b>			<b>Estimated Cost</b>	<b>Planned Start Date (HA Fiscal Year)</b>
Management Improvements			500,000.00	10/01/2003
Non-dwelling Structures			200,000.00	10/01/2003
Administration			352,212.00	10/01/2003
Fees and Costs			360,000.00	10/01/2003
Operations			528,172.00	10/01/2003
<b>Total estimated cost over next 5 years</b>			<b>1,940,384.00</b>	

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

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

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

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

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

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

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

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

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

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



## RESIDENT ADVISORY BOARD COMMENTS

Meeting Date: 9/4/02  
Attendees: Eddie Tronser, Grand Pine  
Ervin Hawkins, Grand Pine  
Sharon Steen, Lucas Gardens  
Ovide Jones, Lucas Gardens

### Comments:

1. Revised Tenant Maintenance Damage Charges- What if damages are done by someone other than the tenant, are we liable?  
BHA Response: Tenants will be charged for damages done by tenants and/or their guests. All other damage should be reported to the management.
2. Revised Tenant Maintenance Charges- Will a resident who is trapped in their unit be charged for damages caused by the fire department kicking in their door?  
BHA Response: No, damages caused by such emergencies will not be charged to the tenant.
3. All in attendance agreed with the revised Tenant Maintenance Charges.
4. Will there be an increase in the utility allowance?  
BHA Response: BHA will assess the need for revised utility allowances in the upcoming year.

# ATTACHMENT

## SECTION 8 HOMEOWNERSHIP PLAN

## HOMEOWNERSHIP OPTION PROGRAM

The Beaumont Housing Authority has established a Section 8 Tenant-based Voucher Homeownership Option pursuant to the HUD proposed rule dated April 30, 1999 and authorization for a Section 8 Homeownership Demonstration Program in a letter from Harold Lucas, Assistant Secretary for Public and Indian Housing dated October 14, 1999.

### Qualifications for Participation

Any Section 8 program participant or applicant who has been issued a Section 8 Housing Choice Voucher may utilize his or her subsidy to purchase rather than rent a home, subject to the following requirements:

1. A family must meet the general requirements for admission to or continued participation in the BHA Section 8 tenant-based Voucher Choice Program.
2. Current Program participants must be in full compliance with their lease and Section 8 program requirements and must terminate their current lease arrangement in compliance with the lease.
3. A head of household or spouse that has previously defaulted on a mortgage obtained through the homeownership option is barred from participation.
4. Program participants and applicants must be 'first-time homeowners'. A family member must not have owned title to a principal residence in the last three years. Residents of limited equity cooperatives are eligible for the homeownership option.
5. Current program participants and new applicants must be deemed to be 'mortgage ready' by The NeighborWorks Homeownership Center of Vermont, the Vermont Development Credit Union or the Section 8 Homeownership Option Program Coordinator before a Homeownership Voucher will be issued.
6. The head of household or spouse must be employed full time and have been continuously so employed during the year before commencement of homeownership assistance. Families with a disabled household member may request an exemption as a reasonable accommodation.)
7. The family's income must be equal to or exceed 40% of the HUD determined median income for the family's unit size. Families with a disabled household member may request an exemption as a reasonable accommodation. The Executive Director may waive the minimum income requirement for an otherwise eligible household who has obtained pre-approval for mortgage financing and who can demonstrate a household budget which assures housing affordability. Public assistance income may not be used for meeting this requirement, except for

households in which the head or spouse. (Public Assistance includes federal housing assistance or the housing component of a welfare grant; TANF assistance; SSI that is subject to an income eligibility test; food stamps; general assistance or other assistance provided under a Federal, state or local program that provides assistance available to meet family living or housing expenses.)

#### Time Frame for Utilization

An applicant will have a maximum of 60 days from the date of issuance of a Housing Choice Voucher to find a home and enter into a 'Contract for Sale'.

If an applicant is unable to enter into a 'Contract for Sale' before the end of the 60 day deadline, the applicant will be provided an additional 60 days to either enter into a 'Contract for Sale' or to utilize the Housing Choice Voucher in a rental situation.

Any extensions beyond 120 days will be at the sole discretion of the Director of Rental Assistance Program.

#### Portability

Families that are determined eligible for homeownership assistance may exercise the homeownership option outside of the initial PHA's jurisdiction if the receiving PHA is administering a Section 8 homeownership program and is accepting new families into the receiving PHA's homeownership program.

#### Permitted Ownership Arrangements

A unit owned by the family—one or more family members hold title to the home. (Homes previous occupied under a lease-purchase agreement are eligible)

A cooperative unit – one or more family members hold membership shares in the cooperative

#### Contract for Sale and Inspection Requirements

Participants in the Homeownership Program must complete a "Contract of Sale" with the owner of the property to be purchased. The unit must be fully built before the Contract of Sale is executed.

The Contract of Sale must include the home's price and terms of sale, the purchaser's pre-purchase inspection requirements and notice that the sale is conditional on the purchaser's acceptance of the inspection report; and an agreement that the purchaser is not obligated to pay for necessary repairs.

The participant must obtain an independent professional home inspection of the unit's major systems at the participant's expense. The inspection must cover major building systems and components, including foundation and structure, housing interior and exterior, and the roofing, plumbing, electrical and heating systems.

BHA will conduct an HQS inspection and will review an independent professional inspection of the unit's major systems. BHA retains the right to disqualify the unit for inclusion in the homeownership program based on either the HQS inspection or the professional inspection report.

The participant must determine and document whether or not the unit is in an airport runway clear zone or an airfield clear zone.

The participant must determine and document whether or not the unit is in a flood hazard area. Units in flood hazard areas must be insured for flood damage.

#### Financing

The household is responsible for obtaining financing.

If purchase of the home is financed with Federal Housing Administration (FHA)-insured mortgage financing, the financing is subject to FHA mortgage insurance credit underwriting requirements.

#### Length and Continuation of Assistance

Section 8 assistance will only be provided for the months the family is in residence in the home.

The maximum length of time a family may receive homeownership assistance is ten years. (Elderly and disabled families are exempt from this time limit).

A homeownership family may purchase another home with Section 8 assistance provided there is no mortgage loan default and the family is in compliance with the 'statement of homeowner obligations'.

#### Family Obligations

Before commencement of homeownership assistance, the family must execute a 'statement of homeowner obligations' in the form prescribed by BHA.

To continue to receive homeownership assistance, a family must comply with the following family obligations:

The family must comply with the terms of any mortgage securing debt incurred to purchase the home, and any refinancing of such debt.

So long as the family is receiving homeownership assistance, the family may not sell, convey or transfer any interest in the home to any entity or person other than a member of the assisted family residing in the home.

The family must supply required information regarding income and family composition in order to correctly calculate total tenant payment and homeownership assistance.

The family must provide information on any mortgage or other debt incurred to purchase the home, and any refinancing of such debt, and any sale or other transfer of any interest in the home.

The family must notify BHA if the family defaults on a mortgage securing any debt incurred to purchase the home.

The family must notify BHA before the family moves out of the home.

The family must, at annual recertification, document that he or she is current on mortgage, insurance and utility payments.

Assistance Payment

The family's Section 8 monthly housing assistance payment will be the lower of (1) the Section 8 voucher payment standard minus the Total Tenant Payment or (2) the monthly homeowner expenses minus the Total Tenant Payment. BHA will annually reexamine family income and composition and make appropriate adjustments to the amount of the monthly housing assistance payment.

Homeownership expenses include principal and interest on mortgage debt, refinancing charges of mortgage debt, taxes and other public assessments, insurance, maintenance and major repair expenses, and the BHA utility allowance schedule. The BHA allowance for maintenance expenses, major repairs and replacements will be based on recommended allowances provided by the BCLT Homeownership Center.

Housing assistance payments will be made directly to the lender. If the housing assistance payment is greater than the mortgage payment and tax/insurance escrow payments, the difference will be paid to the family.

If a family's income increases to a point that they do not receive a housing assistance payment, eligibility for such payments will continue for 180 calendar days. At the end of a continuous period of 180 days without any assistance payments, eligibility for Section 8 assistance will automatically terminate.

Defaults

If a participant in the Homeownership Option defaults on his or her home mortgage loan, the participant will not be able to use his or her Homeownership Voucher for rental housing but may reapply for the Section 8 waiting list.

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

HA Name  
 HOUSING AUTHORITY OF THE CITY OF BEAUMONT, TEXAS

Comprehensive Grant Number  
 TX24PO2370899

FFY of Grant Approval  
 1999

- Original Annual Statement       Reserve for Disasters/Emergencies       Revised Annual Statement/Revision Number   1    
 Performance and Evaluation Report for Program Year Ending   1999 DE-SEG         Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost <sup>2</sup>	
		Original	Revised <sup>1</sup>	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations (May not exceed 10% of line 20)	0.00	0.00	0.00	0.00
3	1408 Management Improvements	150,000.00	113,121.94	113,121.94	113,121.94
4	1410 Administration	0.00	0.00	0.00	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	30,050.00	2,430.08	2,430.08	2,430.08
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	294,900.00	96,345.00	96,345.00	96,345.00
10	1460 Dwelling Structures	161,000.00	881,198.47	40,486.21	40,486.21
11	1465.1 Dwelling Equipment-Non-expendable	2,346,000.00	1,888,854.51	1,888,854.51	1,888,854.51
12	1470 Non-dwelling Structures	23,100.00	23,100.00	23,100.00	23,100.00
13	1475 Non-dwelling Equipment	15,000.00	15,000.00	15,000.00	15,000.00
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	0.00	0.00	0.00	0.00
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1498 Mod Used for Development	0.00	0.00	0.00	0.00
19	1502 Contingency (may not exceed 8% of line 20)	0.00	0.00	0.00	0.00
20	<b>Amount of Annual Grant (Sum of lines 2-19)</b>	3,020,050.00	3,020,050.00	2,179,337.74	2,179,337.74
21	Amount of line 20 Related to LBP Activities	0.00	0.00		
22	Amount of line 20 Related to Section 504 Compliance	16,900.00	16,900.00		

23	Amount of line 20 Related to Security	0.00	0.00		
24	Amount of line 20 Related to Energy Conservation Measures				
Signature of Executive Director			Date	Signature of Public Housing Director	
				Date	

<sup>1</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement

Page 1 of 4

Previous edition is obsolete

Form HUD-52837 (9/98)

<sup>2</sup> To be completed for the Performance and Evaluation Report

ref Handbook 7485.3

Annual Statement/Performance and Evaluation Report

**U.S. Department of Housing  
And Urban Development**

Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

Office of Public and Indian Housing

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 <sup>2</sup>
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
Magnolia Gardens 23-002	Landscaping	1450		10,000.00				
	Improve Insulation	1450		250,000.00	90,845.00	90,845.00	90,845.00	
Concord Homes 23-003	Landscaping	1450		10,000.00	3,300.00	3,000.00	3,300.00	
	Dumpster encloser	1450		8,000.00	0.00	0.00	0.00	
	Make office handicapped accessible	1450		10,000.00	0.00	0.00	0.00	
Grand Pine 23-004	504 access and parking	1450		6,900.00	2,200.00	2,200.00	2,200.00	
	Total			<b>294,900.00</b>	<b>96,345.00</b>	<b>96,345.00</b>	<b>96,345.00</b>	
Concord Homes 23-003	Install vent-a-hood, GFI outlet, wire for cable TV, repair stair treads and repair wood floors	1460		161,000.00	881,198.47	40,486.21	40,486.21	
	Total			<b>161,000.00</b>	<b>881,198.47</b>	<b>40,486.21</b>	<b>40,486.21</b>	
Magnolia Gardens 23-002	Upgrade electrical services and add HVAC	1465.1	195	1,300,000.00	1,300,000.00	1,300,000.00	1,300,000.00	
Concord Homes 23-003	Upgrade electrical services and add HVAC	1465.1	150	695,000.00	237,854.51	237,854.51	237,854.51	
TW I 23-051	Upgrade electrical services and add HVAC	1465.1	24	108,000.00	108,000.00	108,000.00	108,000.00	
TWII	Upgrade electrical services and add	1465.1	54	243,000.00	243,000.00	243,000.00	243,000.00	

23-052	HVAC			2,346,000.00	1,888,854.51	1,888,854.51	1,888,854.51	
	<b>Subtotal</b>			<b>2,801,900.00</b>	<b>2,866,397.98</b>	<b>2,025,685.72</b>	<b>2,025,685.72</b>	

Signature of Executive Director	Date	Signature of Public Housing Director	Date
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To be completed for the Performance and Evaluation Report of a Revised Annual Statement

t<sup>2</sup> To be completed for the Performance and Evaluation Report.

Page 2 of 4

Previous edition is obsolete refHandbook 7485.3

Annual Statement/Performance and Evaluation Report

**U.S. Department of Housing  
And Urban Development**

Office of Public and Indian Housing

Comprehensive Grant Program (CGP) **Part II: Supporting Pages**

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 <sup>2</sup>
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
Magnolia Gardens 23-002	Day Care Center	1470		23,100.00	23,100.00	23,100.00	23,100.00	
	Total			<b>23,100.00</b>	<b>23,100.00</b>	<b>23,100.00</b>	<b>23,100.00</b>	
Concord Homes 23-003	Playground Equipment	1475		15,000.00	15,000.00	15,000.00	15,000.00	
	Total			<b>15,000.00</b>	<b>15,000.00</b>	<b>15,000.00</b>	<b>15,000.00</b>	
PHA Wide	AHOP	1408		<b>150,000.00</b>	<b>113,121.94</b>	<b>113,121.94</b>	<b>113,121.94</b>	
	Fees and Cost	1430		<b>30,050.00</b>	<b>2,430.08</b>	<b>2,430.08</b>	<b>2,430.08</b>	

	Total Grant Amount TX24PO2370899			3,020,050.00	3,020,050.00	2,179,337.74	2,179,337.74	
Signature of Executive Director				Date		Signature of Public Housing Director		Date

To be completed for the Performance and Evaluation Report or a Revised Annual Statement

t<sup>2</sup> To be completed for the Performance and Evaluation Report.

Page 3 of 4

Previous edition is obsolete refHandbook 7485.3

Annual Statement / Performance and Evaluation Report

**U. S. Department of Housing  
And Urban Development**

**Comprehensive Grant Program (CGP) Part III: Implementation Schedule**

Office of Public and Indian Housing

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates <sup>2</sup>
	Original	Revised <sup>1</sup>	Actual <sup>2</sup>	Original	Revised <sup>1</sup>	Actual <sup>2</sup>	
TX023-002 Magnolia Gardens	9/30/01	3/31/02	3/31/02	9/30/02	3/31/02	3/31/02	
TX023-003 Concord Homes	9/30/01	6/30/02		9/30/02	12/31/02		
TX023-004-1 Lucas Gardens	9/30/01	3/31/02	3/31/02	9/30/02			
		3/31/02	3/31/02	9/30/02	3/31/02	3/31/02	
TX023-004-2 Grand Pine	9/30/01	3/31/02	3/31/02	9/30/02	3/31/02	3/31/02	
		3/31/02	3/31/02	9/30/02	3/31/02	3/31/02	
Agency Wide	9/30/01	3/31/02	3/31/02	9/30/02	3/31/02	3/31/02	
Administration	9/30/01	3/31/02	3/31/02	9/30/02	3/31/02	3/31/02	
Mgt Improve	9/30/01	3/31/02	3/31/02	9/30/02	3/31/02	3/31/02	
Physical Improvements	9/30/01	3/31/02	3/31/02	9/30/02	3/31/02	3/31/02	
Dwelling Equipment	9/30/01	3/31/02	3/31/02	9/30/02	3/31/02	3/31/02	
Non-Dwelling Equipment	9/30/01	3/31/02	3/31/02	9/30/02	3/31/02	3/31/02	

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Signature of Executive Director	Date	Signature of Public Housing Director	Date
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<sup>1</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.  
<sup>2</sup> 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

HA Name HOUSING AUTHORITY OF THE CITY OF BEAUMONT, TEXAS	Comprehensive Grant Number TX24PO23709-99	FFY of Grant Approval 1999
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- Original Annual Statement     
  Reserve for Disasters/Emergencies     
  Revised Annual Statement/Revision Number \_\_\_\_\_  
 Performance and Evaluation Report for Program Year Ending  1999      
  Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost <sup>2</sup>	
		Original	Revised <sup>1</sup>	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations (May not exceed 10% of line 20)	0.00	0.00	0.00	0.00
3	1408 Management Improvements	144,700.00	48,391.03	48,391.03	48,391.03
4	1410 Administration	71,550.00	69,234.66	69,234.66	69,234.66
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	69,031.00	19,490.24	19,490.24	19,490.24
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	287,215.00	287,215.00	287,215.00	287,215.00

10	1460	Dwelling Structures	120,604.00	342,827.74	255,218.42	15,180.00
11	1465.1	Dwelling Equipment-Non-expendable	33,784.00	26,088.26	26,088.26	26,088.26
12	1470	Non-dwelling Structures	60,000.00	60,000.00	60,000.00	60,000.00
13	1475	Non-dwelling Equipment	5,000.00	7,496.07	7,496.07	7,496.07
14	1485	Demolition	0.00	0.00	0.00	0.00
15	1490	Replacement Reserve	0.00	0.00	0.00	0.00
16	1492	Moving to Work Demonstration	0.00	0.00	0.00	0.00
17	1495.1	Relocation Costs	0.00	0.00	0.00	0.00
18	1498	Mod Used for Development	0.00	0.00	0.00	0.00
19	1502	Contingency (may not exceed 8% of line 20)	68,859.00	0.00	0.00	0.00
20	<b>Amount of Annual Grant (Sum of lines 2-19)</b>		860,743.00	860,743.00	773,133.68	533,095.26
21	Amount of line 20 Related to LBP Activities		0.00			
22	Amount of line 20 Related to Section 504 Compliance		0.00			
23	Amount of line 20 Related to Security		0.00			
24	Amount of line 20 Related to Energy Conservation Measures		0.00			
Signature of Executive Director			Date	Signature of Public Housing Director		Date

<sup>1</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement  
<sup>2</sup> To be completed for the Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report

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

**Comprehensive Grant Program (CGP) Part II: Supporting Pages**

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
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	

<b>TX-023-003</b>	<b>Site Improvement</b>							
Concord Homes	Removal of Hazardous Materials from Site Termite Treatment	1450	9 bldgs	270,000.00	270,000.00	270,000.00	270,000.00	
		1450	57,383 sf	17,215.00	17,215.00	17,215.00	17,215.00	
	<b>Non-Dwelling Structures</b>							
	Remodel Daycare Center-Desegregation Item	1470	1	60,000.00	60,000.00	60,000.00	60,000.00	
	<b>Dwelling Structures</b>							
	Front Screen	1460	90	22,631.00	342,827.74	255,218.42	7,590.00	
	Rear Screen	1460	90	22,595.00			7,590.00	
	<b>Dwelling Equipment</b>							
	Stoves	1465	32	12,178.00	16,419.29	16,419.29	16,419.29	
	Refrigerators	1465	50	21,606.00	9,668.97	9,668.97	9,668.97	
<b>TX023-P004-1</b>	<b>Dwelling Structures</b>							
Lucas Gardens	Front Screen	1460	56	14,082.00	0.00	0.00	0.00	
	Rear Screen	1460	56	14,059.00	0.00	0.00	0.00	
<b>TX023-P004-2</b>	<b>Dwelling Structures</b>							
Grand Pine	Front Screen	1460	94	23,637.00	0.00	0.00	0.00	
	Rear Screen	1460	94	23,600.00	0.00	0.00	0.00	
	<b>Subtotal</b>			<b>501,603.00</b>	<b>716,131.00</b>	<b>628,521.68</b>	<b>388,483.26</b>	
	<b>Subtotal this page</b>							

Signature of Executive Director

Date

Signature of Public Housing Director

Date

To be completed for the Performance and Evaluation Report or a Revised Annual Statement<sup>2</sup> To be completed for the Performance and Evaluation Report.Page 2 of 5

Previous edition is obsolete refHandbook 7485.3

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

PHA Name: Beaumont Housing Authority		TX24P023709-99				1999		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Obligated	Expended	
Agency Wide Management Improvements	General Technical Assist/PHMAP Improv	1408		5000	0	0	0	
	Update policies & procedures	1408		2500	0	0	0	
	Conversion Analysis Study	1408		8500	0	0	0	
	New Tracking Systems	1408		4200	0	0	0	
	PHAS Tracking	1408		8500	0	0	0	
	PHAS Training	1408		2500	0	0	0	
	New Policy Training	1408		5500	0	0	0	
	Board of Comm-Training	1408		1800	0	0	0	
	Dev Automated Inventory Control	1408		3500	0	0	0	
	Housekeeping	1408		1200	0	0	0	
	Homeownership Training	1408		500	0	0	0	
	New Admission/Occupancy Training	1408		2500	2500	2500	2500	
	Self Sufficiency	1408		2500	2500	2500	2500	
	HQS Requirements	1408		1200	0	0	0	
	Maintenance Technical	1408		2000	0	0	0	
	Apprentice Job Training	1408		1500	1380	1380	1380	
	Resident Satisfaction Training	1408		4500	3049	3049	3049	
	Uniform Inspection Sys Training	1408		2500	0	0	0	

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

PHA Name: Beaumont Housing Authority		Grant Type and Number Capital Fund Program Grant No: TX24P023709-99 Replacement Housing Factor Grant No:				Federal FY of Grant: 1999		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Obligated	Expended	
	Resident Community Work Training	1408		4900	0	0	0	
	Computer Software Upgrade	1408		3500	1162	1162	1162	
	Resident Council Leadership	1408		500	0	0	0	
	Low Rent Procedures	1408		6500	0	0	0	
	Mgt,Financial, Acctg Control Sys	1408		2800	2800	2800	2800	
	Crime Prevention & Safety Plan	1408		4500	0	0	0	
	Community Work Requirement System	1408		2800	0	0	0	
	Develop Comprehensive Maint & Ann Fac Plan	1408		21000	7000	7000	7000	

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

PHA Name: Beaumont Housing Authority		TX24P023709-99				1999			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories		Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
	Security Coordinator		1408		28000	28000	28000	28000	
	Benefits		1408		9800	0	0	0	



**Comprehensive Grant Program (CGP) Part II: Supporting Pages**

Office of Public and Indian Housing

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
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
AGENCY- WIDE								
Administration	CGP Inspector	1410		28,000.00	28,000.00	28,000.00	28,000.00	
	Clerk-of-the-Works	1410		25,000.00	25,000.00	25,000.00	25,000.00	
	Benefits	1410		18,550.00	16,234.66	16,234.66	16,234.66	
	<b>Subtotal</b>			<b>71,550.00</b>	<b>69,234.66</b>	<b>69,234.66</b>	<b>69,234.66</b>	
Fees and Costs (A&E)	A/E Services	1430		37,421.00	17,538.29	17,538.29	17,538.29	
	Inspection Costs	1430		10,610.00	1,918.97	1,918.97	1,918.97	
	Printing Costs	1430		2,000.00	32.98	32.98	32.98	
	Consultant Fees, Annual Plan Consortia	1430		19,000.00	0.00	0.00	0.00	
	<b>Subtotal</b>			<b>69,031.00</b>	<b>19,490.24</b>	<b>19,490.24</b>	<b>19,490.24</b>	
	Contingency	1502		68,859.00	0.00	0.00	0.00	
	<b>Subtotal</b>			<b>68,859.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
Non-Dwelling Equipment	Y2K Improvements	1475		5,000.00	7,496.07	7,496.07	7,496.07	
	<b>Subtotal</b>			<b>5,000.00</b>	<b>7,496.07</b>	<b>7,496.07</b>	<b>7,496.07</b>	
				<b>214,440.00</b>	<b>96,220.97</b>	<b>96,220.97</b>	<b>96,220.97</b>	
<b>Subtotal this page</b>				<b>860,743.00</b>	<b>860,743.00</b>	<b>773,133.68</b>	<b>533,095.26</b>	
<b>Grant Total</b>								

Signature of Executive Director

Date

Signature of Public Housing Director

Date

Annual Statement / Performance and Evaluation Report

**U. S. Department of Housing  
 And Urban Development**

**Comprehensive Grant Program (CGP) Part III: Implementation Schedule**

Office of Public and Indian Housing

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates <sup>2</sup>
	Original	Revised <sup>1</sup>	Actual <sup>2</sup>	Original	Revised <sup>1</sup>	Actual <sup>2</sup>	
TX23-P002 MAGNOLIA GARDENS	9/30/01	3/31/02	3/31/02	9/30/01	3/31/02	3/31/02	
TX023-P003 CONCORD HOMES		6/30/02			12/31/02		
TX023-P004-1 LUCAS GARDENS		3/31/02	3/31/02		3/31/02	3/31/02	
TX023-PO004-2 GRAND PINE		3/31/02	3/31/02		3/31/02	3/31/02	
AGENCY-WIDE ADMINISTRATION		3/31/02	3/31/02		3/31/02	3/31/02	
MGMT IMPROVE (s)		3/31/02	3/31/02		3/31/02	3/31/02	
PHYSICAL IMPROVE(S)		3/31/02	3/31/02		3/31/02	3/31/02	
DWELLING EQPT		3/31/02	3/31/02		3/31/02	3/31/02	
NON-DWELLING EQPT		3/31/02	3/31/02		3/31/02	3/31/02	

Signature of Executive Director

Date

Signature of Public Housing Director

Date

<sup>1</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

<sup>2</sup> 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

HA Name HOUSING AUTHORITY OF THE CITY OF BEAUMONT, TEXAS	Comprehensive Grant Number TX24PO2350100	FFY of Grant Approval 2000
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- Original Annual Statement     
  Reserve for Disasters/Emergencies     
  Revised Annual Statement/Revision Number \_\_\_\_\_  
 Performance and Evaluation Report for Program Year Ending \_2000\_\_\_\_     
  Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost <sup>2</sup>	
		Original	Revised <sup>1</sup>	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations (May not exceed 10% of line 20)	0.00	0.00	0.00	0.00
3	1408 Management Improvements	129,325.00	0.00	0.00	0.00
4	1410 Administration	72,761.00	0.00	0.00	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	61,042.00	8,405.48	8,405.48	8,405.48
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	227,660.00	227,660.00	227,660.00	227,660.00
10	1460 Dwelling Structures	504,510.00	823,610.16	504,510.00	504,510.00
11	1465.1 Dwelling Equipment-Non-expendable	17,600.00	0.00	0.00	0.00
12	1470 Non-dwelling Structures	35,000.00	0.00	0.00	0.00
13	1475 Non-dwelling Equipment	5,000.00	2,552.36	2,552.36	2,552.36
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	0.00	0.00	0.00	0.00
17	1495.1 Relocation Costs	9,900.00	570.00	570.00	570.00
18	1498 Mod Used for Development	0.00	0.00	0.00	0.00
19	1502 Contingency (may not exceed 8% of line 20)	0.00	0.00	0.00	0.00
20	<b>Amount of Annual Grant (Sum of lines 2-19)</b>	1,062,798.00	1,062,798.00	743,697.84	743,697.84
21	Amount of line 20 Related to LBP Activities	0.00	0.00	0.00	0.00
22	Amount of line 20 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
23	Amount of line 20 Related to Security	69,525.00	69,525.00	0.00	0.00
24	Amount of line 20 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

Signature of Executive Director

Date

Signature of Public Housing Director

Date

<sup>1</sup> To be completed for the Performance and Evaluation Report or a Revised Annual StatementPage   1   of   3  

Previous edition is obsolete

Form **HUD-52837** (9/98)<sup>2</sup> To be completed for the Performance and Evaluation Report

ref Handbook 7485.3

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

**U.S. Department of Housing  
 And Urban Development**

Office of Public and Indian Housing

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 <sup>2</sup>
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
CONCORD HOMES TX24P023-003	Install new underground utilities and parking lot	1450		<b>227,660.00</b>	<b>227,660.00</b>	<b>227,660.00</b>	<b>227,660.00</b>	
CONCORD HOMES TX24P023-003	Complete Modernization of 30 units new sheetrock, cabinets, bathrooms, floor cover and other needed items	1460		<b>504,510.00</b>	<b>823,610.16</b>	<b>504,510.00</b>	<b>504,510.00</b>	
CONCORD HOMES TX24P023-003	Stoves and refrigerators	1465.1		<b>17,600.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
CONCORD HOMES TX24P023-003	Office Equipment	1475		<b>5,000.00</b>	<b>2,552.36</b>	<b>2,552.36</b>	<b>2,552.36</b>	
AGENCY-WIDE MANAGEMENT IMPROVEMENTS	General Technical Assistance	1408		4,000.00				
	Upgrade policies and procedures	1408		2,500.00				
	New policies training	1408		3,300.00				
	Board of Commissioners training	1408		3,600.00				
	Housekeeping training	1408		2,400.00				
	Home Ownership Training	1408		3,000.00				
	Self-sufficiency programs	1408		5,000.00				
	Security Personnel, Crime Prevention & Safety	1408		41,525.00				
	Security Coordinator	1408		28,000.00				
	Resident Council Training	1408		5,000.00				
	Preventative Maintenance	1408		12,000.00				
	Community Service Work Requirement	1408		4,000.00				
	Benefits	1408		15,000.00	0.00	0.00	0.00	
	TOTAL			<b>129,325.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
AGENCY WIDE ADMINIS	Program Director	1410		28,000.00				
	Clerk of the Works	1410		25,000.00				
	Benefits	1410		19,761.00	0.00	0.00	0.00	
	TOTAL			<b>72,761.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
AGENCY WIDE	Relocation Cost	1495.1		<b>9,900.00</b>	<b>570.00</b>	<b>570.00</b>	<b>570.00</b>	
MAGNOLIA GARDENS TX023-P002	Remodel Daycare Center	1470		<b>35,000.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
FEES AND COSTS (a&e)	A/E Services	1430		35,971.00	8,405.48	8,405.48	8,405.48	
	Inspection Cost	1430		14,060.00				
	Printing Cost	1430		6,500.00				
	Consultant Fees	1430		4,511.00				
	TOTAL			<b>61,042.00</b>	<b>8,405.48</b>	<b>8,405.48</b>	<b>8,405.48</b>	
GRAND TOTAL				<b>1,062,798.00</b>	<b>1,062,798.00</b>	<b>743,697.84</b>	<b>743,697.84</b>	

Signature of Executive Director

Date

Signature of Public Housing Director

Date

To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

Form HUD-52837 (9/98)

Annual Statement / Performance and Evaluation Report

**U. S. Department of Housing  
And Urban Development**

**Comprehensive Grant Program (CGP) Part III: Implementation Schedule**

Office of Public and Indian Housing

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates <sup>2</sup>
	Original	Revised <sup>1</sup>	Actual <sup>2</sup>	Original	Revised <sup>1</sup>	Actual <sup>2</sup>	
TX23-P002 MAGNOLIA GARDENS	9/30/02			03/31/03			
TX023-P003 CONCORD HOMES	9/30/02			03/31/03			
MGMT IMPROVE (s)	9/30/02			03/31/03			
FEES & COST	9/30/02			03/31/03			
ADMINISTRATION	9/30/02			03/31/03			
PHA WIDE	9/30/02			03/31/03			
Signature of Executive Director				Signature of Public Housing Director			
Date				Date			

<sup>1</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

<sup>2</sup> To be completed for the Performance and Evaluation Report.

Comprehensive Grant Program (CGP) **Part I: Summary**

**and urban Development**  
Office of Public and Indian Housing

HA Name HOUSING AUTHORITY OF THE CITY OF BEAUMONT, TEXAS	Comprehensive Grant Number TX24PO2350101	FFY of Grant Approval 2001
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- Original Annual Statement     
  Reserve for Disasters/Emergencies     
  Revised Annual Statement/Revision Number \_1  
 Performance and Evaluation Report for Program Year Ending \_2001\_\_\_\_     
  Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost <sup>2</sup>	
		Original	Revised <sup>1</sup>	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations (May not exceed 10% of line 20)	121,193.00	121,193.00	0.00	0.00
3	1408 Management Improvements	129,325.00	240,000.00	15,785.62	15,785.62
4	1410 Administration	72,761.00	72,761.00	7,263.70	7,263.70
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	61,042.00	61,042.00	0.00	0.00
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	120,000.00	120,000.00	0.00	0.00
10	1460 Dwelling Structures	580,000.00	387,432.00	0.00	0.00
11	1465.1 Dwelling Equipment-Non-expendable	17,500.00	17,500.00	200.00	200.00
12	1470 Non-dwelling Structures	35,000.00	35,000.00	0.00	0.00
13	1475 Non-dwelling Equipment	7,000.00	7,000.00	2,738.56	2,738.56
14	1485 Demolition	32,170.00	141,000.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	0.00	0.00	0.00	0.00
17	1495.1 Relocation Costs	9,000.00	9,000.00	0.00	0.00
18	1498 Mod Used for Development	0.00	0.00	0.00	0.00
19	1502 Contingency (may not exceed 8% of line 20)	26,937.00	0.00	0.00	0.00
20	<b>Amount of Annual Grant (Sum of lines 2-19)</b>	1,211,928.00	1,211,928.00	25,987.88	25,987.88
21	Amount of line 20 Related to LBP Activities	0.00	0.00	0.00	0.00
22	Amount of line 20 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
23	Amount of line 20 Related to Security	69,525.00	69,525.00	0.00	0.00
24	Amount of line 20 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

Signature of Executive Director	Date	Signature of Public Housing Director	Date
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Annual Statement/Performance and Evaluation Report

**U.S. Department of Housing  
And Urban Development**

Office of Public and Indian Housing

**Comprehensive Grant Program (CGP) Part II: Supporting Pages**

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 <sup>2</sup>
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
MAGNOLIA GARDENS TX24PO23-002	Remodel Daycare Center	1470		35,000.00	35,000.00	0.00	0.00	
CONCORD HOMES TX24P023-003	Replace & repair sidewalks, add new parking lots and landscaping of area	1450		120,000.00	120,000.00	0.00	0.00	
CONCORD HOMES TX24P023-003	Complete Modernization of units new wiring, sheetrock, cabinets, floor s, etc.	1460	22	580,000.00	387,432.00	0.00	0.00	
CONCORD HOMES TX24P023-003	Replace hot water heater, stoves, refrigerators and HVAC units	1465.1	22 each	17,500.00	17,500.00	200.00	200.00	
	Maintenance Equipment	1475		7,000.00	7,000.00	2,738.56	2,738.56	
	Demolition of Building and Clear Lots	1485	3	32,170.00	141,000.00	0.00	0.00	
	<b>TOTAL</b>			<b>756,670.00</b>	<b>672,932.00</b>	<b>2,938.56</b>	<b>2,938.56</b>	
HA-WIDE	Operations	1406		<b>121,193.00</b>	<b>121,193.00</b>	<b>0.00</b>	<b>0.00</b>	
MANAGEMENT IMPROVEMENTS	General Technical Assistance	1408		4,000.00				
	Upgrade policies and procedures	1408		2,500.00				
	New policies training	1408		3,300.00				
	Board of Commissioners training	1408		3,600.00				
	Housekeeping training	1408		2,400.00				
	Home Ownership Training	1408		3,000.00				
	Self-sufficiency programs	1408		5,000.00				
	Security Personnel, Crime Prevention & Safety	1408		69,525.00				
	Resident Council Training	1408		28,000.00				
	Preventative Maintenance	1408		5,000.00				
	Community Service Work Requirement	1408		12,000.00				
	Benefits	1408		4,000.00				
		1408		15,000.00				
	<b>TOTAL</b>			<b>129,325.00</b>	<b>240,000.00</b>	<b>15,785.62</b>	<b>15,785.62</b>	
AGENCY WIDE ADMINIS	Program Director	1410		36,000.00	36,000.00	0.00	0.00	
	Clerk of the Works	1410		26,000.00	26,000.00	0.00	0.00	
	Benefits	1410		10,761.00	10,761.00	7,263.70	7,263.70	
	<b>TOTAL</b>			<b>72,761.00</b>	<b>72,761.00</b>	<b>7,263.70</b>	<b>7,263.70</b>	
AGENCY WIDE	Relocation Cost	1495.1		<b>9,000.00</b>	<b>9,000.00</b>	<b>0.00</b>	<b>0.00</b>	
FEES AND COSTS (A&E)	A/E Services	1430		35,971.00	35,971.00	0.00	0.00	
	Inspection Cost	1430		14,060.00	14,060.00	0.00	0.00	
	Printing Cost	1430		2,506.00	2,506.00	0.00	0.00	
	Consultant Fees	1430		8,505.00	8,505.00	0.00	0.00	
	<b>TOTAL</b>			<b>61,042.00</b>	<b>61,042.00</b>	<b>0.00</b>	<b>0.00</b>	
AGENCY WIDE	Contingency	1502		<b>26,937.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
	<b>GRAND TOTAL</b>			<b>1,211,928.00</b>	<b>1,211,928.00</b>	<b>25,987.88</b>	<b>25,987.88</b>	

Signature of Executive Director

Date

Signature of Public Housing Director

Date

Annual Statement / Performance and Evaluation Report

**U. S. Department of Housing  
 And Urban Development**

**Comprehensive Grant Program (CGP) Part III: Implementation Schedule**

Office of Public and Indian Housing

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates <sup>2</sup>
	Original	Revised <sup>1</sup>	Actual <sup>2</sup>	Original	Revised <sup>1</sup>	Actual <sup>2</sup>	
TX23-P002 MAGNOLIA GARDENS	9/30/03			9/30/04			
TX023-P003 CONCORD HOMES	9/30/03			9/30/04			
MGMT IMPROVE FEES & COST	9/30/03			9/30/04			
ADMINISTRATION	9/30/03			9/30/04			
PHA WIDE	9/30/03			9/30/04			

Signature of Executive Director

Date

Signature of Public Housing Director

Date

## STATEMENT OF PROGRESS AGAINST FY2000 GOALS

### A. Mission

The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.

### Goals

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

**BHA Goal: Expand the supply of assisted housing**

#### **Objective 1:**

By March 2000, Housing Management will reduce public housing vacancies from 3 to 0 authority-wide by attracting new clients off the waiting list, which will decrease vacancies by 1%.

**BHA has continued to gradually reduce the vacancy rate since 2000. However, the current push to offer public housing residents DHO vouchers has impeded the progress.**

#### **Objective 2:**

By November, 2000, BHA will leverage private or other public funds to create additional housing opportunities by contacting community builders through HUD.

**BHA will place an RFP during FY 2003 to solicit services for a HOPE IV grant application.**

#### **Objective 3:**

By May 2000, BHA will acquire vacant land from the City of Beaumont to construct 48 units to complete the 148-unit acquisition.

**This goal has been achieved this goal through the acquisition of 50 additional single-family homes in non-impacted areas throughout Beaumont, which completes the 150 unit Neches Park Replacement Program.**

## **BHA Goal: Improve the quality of assisted housing**

### **Objective 1:**

By May 2000, BHA will maintain public housing management PHAS score of 100.

*BHA has achieved this goal with a PHAS score of 82 for 2001. As of the date of the 2002 Annual Plan, BHA's tentative PHAS score is projected to be in the low to mid 80's.*

### **Objective 2:**

By July 2000, BHA will maintain voucher management SEMAP score of 100.

*BHA has moved towards the achievement of this goal. BHA will continue to strive for performance improvement*

### **Objective 3:**

By February 2000, Section 8 will increase customer satisfaction by being more resourceful, prompt, and continue to be courteous.

*BHA has achieved this goal through staff, resident and landlord training.*

### **Objective 4:**

By January 2001, the Modernization Division will construct 48 public housing units throughout the City of Beaumont.

**BHA has achieved this goal through the acquisition of 50 single-family units.**

### **Objective 5:**

By February 2000, the Modernization and Development division will perform interior demolition at Concord Homes to start renovation stage for 78 units.

**BHA has achieved this goal through the demolition of 50 units and the renovation of 30 units as scheduled. The remaining units will be renovated by February 2003.**

### **Objective 6:**

By January 2001, 48 unit new construction and 100-unit acquisition will be completed, which will increase housing stock from 622 to 770.

**BHA has achieved this goal through the acquisition of 150 single-family units throughout Beaumont.**

**Additional accomplishments:**

BHA has begun to take steps to improve the curb appeal of public housing properties, which is expected to attract new residents to public housing and eliminate vacancies. Security continues to be improved through the use of PHDEP funds and a renewed attention to the issue.

*BHA continues to improve the curb appeal of the public housing properties. Improvements such as flag pole installation; fence replacement, landscaping and sidewalk repairs have been completed. BHA proposes to paint the exteriors in the upcoming year.*

**BHA Goal: Increase assisted housing choices****Objective 1:**

By January 2000, Section 8 will conduct outreach efforts to potential voucher landlords.

In December 2000, BHA in collaboration with Port Arthur and Orange PHAs conducted a Section 8 landlord meeting regarding lead-based paint requirements and other issues. It was very well received. BHA intends to continue such outreach efforts throughout 2001 and on-going.

**BHA in cooperation with the Orange and Port Arthur Housing Authorities hosted landlord recruitment events during the month of November 2002. BHA has increased its recruitment efforts to increase landlord participation.**

**Objective 2:**

By January 2000, BHA will submit a request to HUD for an increase in voucher payments so that BHA may increase Section 8 voucher payment standards. This will enable BHA to attract more landlords to the Section 8 program in non-impacted areas.

BHA is working with HUD Fort Worth to increase the payment standard to assist in providing desegregative housing opportunities in Beaumont.

**Payment standards have been increased to assist Section 8 participants improve their housing choices in non-impacted areas of Jefferson County. This will also assist in providing more desegregative housing opportunities.**

### **Objective 3:**

By January 2003, BHA will implement first-time homeownership program, which will increase participation from 49 to 100 homeowners.

BHA has developed a plan for the Homeownership Program and plans to submit this plan to HUD for approval this year. BHA currently has 54 participants in the homeownership program, 10 of which have already purchased homes.

**Since the approval of the Homeownership Program by HUD, BHA has sold 8 additional homes to participants in this program.**

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

**BHA Goal: Provide an improved living environment**

### **Objective 1:**

By January, 2003, BHA will achieve poverty deconcentration requirements by bringing higher income public housing households into lower income developments at BHA. BHA will increase the number of higher income households in public housing from 39 to 154; this will be a 20% increase over the next 3 years.

*BHA has begun to implement measures to deconcentrate poverty by giving higher income families a preference on the waitlist*

**By March 2003, Housing Management will achieve income-mixing requirements in public housing by giving access to lower income families into higher income developments.**

### **Objective 2:**

By June, 2001, BHA's Modernization division will install wrought iron fencing at Concord Homes. This will improve resident safety and security at this development.

*Wrought iron fences will be installed upon the completion of the renovation.*

### **Objective 3:**

By March 2000, BHA will designate Lucas Garden and Grand Pines (or sections of these developments) for occupancy by elderly residents only.

BHA has begun the application process for designation of Grand Pines and Lucas Gardens as elderly housing

**This goal has not been achieved to date.**

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

**BHA Goal: Promote self-sufficiency and asset development of assisted households.**

**Objective 1:**

By 2002, Resident Initiatives will promote self-sufficiency and asset development of assisted housing by 10%.

BHA is in the process of reassessing the Resident Initiative programs and will implement improvements throughout 2001.

**BHA has met its 2000 and 2001 objectives. The program has been reorganized and has increased enrollment in the FSS program by 50%.**

**Objective 2:**

By 2002, Resident Initiatives will increase the number and percentage of employed persons in assisted housing from 204 to 220, which will be an 8% increase.

*BHA has established an agreement that creates unpaid work experience opportunities for TANF recipients in conjunction with the Texas Department of Human Services and other program partners.*

BHA has met the above objectives. BHA continues to work with Texas Department of Human Services to assist in meeting the needs of the tenants.

**Objective 3:**

By 2002, BHA will increase employability services to 50 additional residents. This will increase the numbers of residents receiving these services from 150 to 200, which is a 25% increase.

BHA surpassed this objective; the Resident Empowerment Program has provided computer and education classes, resume and job skill development classes to over 200 residents.

**Objective 4:**

By 2002, Resident Initiatives will increase the number of independent disabled or elderly residents from 100 to 125, which is a 20% increase.

BHA's Resident Initiatives has begun to provide additional support service referrals to these residents in conjunction with program partners, including Department of Human Services, Shaffer's Hearing and Speech Center, and local hospitals.

**The Resident Empowerment Program has increased the number of elderly residents participating in self-development classes and other social services to encourage active living.**

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

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

**Objectives 1:**

By June 2000, Admissions will undertake affirmative measures to ensure access to assisted housing, regardless of race, color, religion, national origin, sex, familial status and disability.

BHA has provided vouchers to Young v. Cuomo class members at exception rent amounts in order to improve housing choice in non-impacted areas of Jefferson County. The Authority has begun to work more closely with the ETFHSC to establish more desegregative housing opportunities and affirmatively further fair housing.

**BHA and ETFHSC have successfully housed 25 classmembers in the Scattered Sites program.**

**Objective 2:**

By June 2000, Admissions will undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion, national origin, sex, familial status and disability.

BHA is working on new wait list procedures and tenant orientations to improve the fair housing.

**BHA currently employs an Elderly Coordinator to work exclusively with the elderly and disabled residents.**

**Objective 3:**

By June 2000, Admissions will undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required.

BHA has appointed an ADA Coordinator to oversee the necessary modifications to the properties for accessibility. Five of the scattered site properties are being modified to comply with ADA.

***BHA has achieved its goal of modifying 5 homes in the Scattered Site program to comply with ADA requirements. BHA will continue to make necessary modifications to units for clients with special needs.***