

HOUSING AUTHORITY OF THE CITY OF FORT MYERS

PHA Plans

5 Year Plan for Fiscal Years 2000 - 2004

Annual Plan for FFY 2003

HACFM Fiscal Year beginning 04/2003

Submitted January 15, 2003

**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: FORT MYERS HOUSING AUTHORITY

PHA Number: FL047

PHA Fiscal Year Beginning: (mm/yyyy) 04/2003

Public Access to Information

Information regarding any activities outlined in this plan can be obtained by contacting: (select all that apply)

- Main administrative office of the PHA
- PHA development management offices
- PHA local offices

Display Locations For PHA Plans and Supporting Documents

The PHA Plans (including attachments) are available for public inspection at: (select all that apply)

- Main administrative office of the PHA
- PHA development management offices
- PHA local offices
- Main administrative office of the local government
- Main administrative office of the County government
- Main administrative office of the State government
- Public library
- PHA website
- Other (list below)

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

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

5-YEAR PLAN
PHA FISCAL YEARS 2000 - 2004
[24 CFR Part 903.5]

A. Mission

State the PHA's mission for serving the needs of low-income, very low income, and extremely low-income families in the PHA's jurisdiction. (select one of the choices below)

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- The PHA's mission is: (state mission here)
The Mission of the Fort Myers Housing Authority is to provide affordable, quality housing, services and opportunities to low income families and ensure a continuum of housing opportunities for all program participants and a broad range of redevelopment activities directed toward improving communities.

B. Goals

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD-suggested objectives or their own, **PHAS ARE STRONGLY ENCOURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS.** (Quantifiable measures would include targets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the spaces to the right of or below the stated objectives.

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

- PHA Goal: Expand the supply of assisted housing
Objectives:
- Apply for additional rental vouchers:
 - Reduce public housing vacancies:
 - Leverage private or other public funds to create additional housing opportunities:
 - Acquire or build units or developments
 - Other (list below)
- PHA Goal: Improve the quality of assisted housing
Objectives:
- Improve public housing management: (PHAS score)
 - Improve voucher management: (SEMAP score)
 - Increase customer satisfaction:

- Concentrate on efforts to improve specific management functions:
(list; e.g., public housing finance; voucher unit inspections)
 - Renovate or modernize public housing units:
 - Demolish or dispose of obsolete public housing:
 - Provide replacement public housing:
 - Provide replacement vouchers:
 - Other: (list below)
- PHA Goal: Increase assisted housing choices
- Objectives:
- Provide voucher mobility counseling:
 - Conduct outreach efforts to potential voucher landlords
 - Increase voucher payment standards
 - Implement voucher homeownership program:
 - Implement public housing or other homeownership programs:
 - Implement public housing site-based waiting lists:
 - Convert public housing to vouchers:
 - Other: (list below)

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

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

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

- PHA Goal: Promote self-sufficiency and asset development of assisted households
- Objectives:
- Increase the number and percentage of employed persons in assisted families:
 - Provide or attract supportive services to improve assistance recipients' employability:

- Provide or attract supportive services to increase independence for the elderly or families with disabilities.
- Other: (list below)

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

- PHA Goal: Ensure equal opportunity and affirmatively further fair housing Objectives:
 - Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:
 - Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:
 - Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
 - Other: (list below)

Other PHA Goals and Objectives: (list below)

*SUMMARY OF ACTIVITIES UNDERTAKEN BY HACFM DURING FY2002
TOWARD ACHIEVING THE FMHA GOALS & OBJECTIVES:*

- I. Maintain a High Occupancy Rate of Rental Units**
 - FMHA evaluated the success of using outside maintenance service contractors to supplement in-house efforts.
 - FMHA continued to market vacancies.
 - Revised Intake procedures to develop a Pre-App
 - Developed automated system for processing applications
 - Implemented flat rents
- II. Upgrading the existing housing stock**
 - Inspected units to develop costs & extent of needed renovations
 - Began Renovations in Public Housing to modernize baths and kitchens in Michigan and upgrade flooring with carpeting and vinyl in Southward and Palmetto
 - Developed “Force Account” labor for modernization effort
- III. Providing additional affordable rental housing stock**
 - Created additional housing by purchasing Horizons in Oct 2000 for fair market rental, providing 180 units.
 - Prepared a study of housing needs in 2000
- IV. Ensure long-term viability of the agency**
 - Continue on-going meetings w/ City to discuss City’s Section 8 program
- V. Improve the quality and process for delivery of resident services**
 - Investigated services provided by outside agencies

- Investigated residents transportation needs. Met with local transportation provider to tailor routes for public housing residents
- Purchased additional van for resident transport
- Investigated start-up opportunities for adult education through
 - A. Community Technology Grant (2001 & 2002))
 - B. Microsoft Neighborhood Network Center Grant application (FY 2001)
 - C. Public Housing Drug Elimination Grant FY 2001
 - D. Multi-Family Drug Elimination Grant FY 2001
 - E. ROSS Resident Opportunities Grant FY 2001
 - F. New Approach Drug Grant FY 2000
 - G. ROSS Elderly Service Coordinator (2001 & 2)

VI. Provide programs that support and/or encourage economic opportunity for residents

- Surveyed local providers and collected information on programs which promote resident self-sufficiency
- Submitted Community Technology Center Grants (D. of Ed)
- Submitted ROSS Resident Opportunities Grant (HUD)
- Met with Lee Tran to improve transportation for Residents

VII. Establish a Housing Consortium/Mini District

The Board is reviewing this goal.

VIII. Create Homeownership Opportunities

The Board is reviewing this goal.

IX. Change the face of public housing along with public perception.

- Conducted a salary comparability study in FY 2000
- Implemented Staff Training Programs in FY 2001 & 2002
- Community Service : Information on the program as voluntary was sent to residents. Meetings held and notices posted throughout the FMHA notifying residents of the new HUD regulations that the program is now voluntary. Provided for the Resident Initiatives Coordinator of FMHA to attend all Resident Council Meetings and interact with residents, following up and mediating complaints.
- Neighborhood Appearance: The FMHA switched to City Trash pick up in 2002 which provides larger containers for trash in an effort to improve neighborhood appearance. The FMHA also stepped up enforcement of lease violations having to do with littering in 2002; improved perimeter lighting; and painted PH development exteriors to improve curb-appeal of properties
- Safety: To ensure resident safety and security in Public Housing, the FMHA vigorously enforced evictions and has stepped up lease violations during 2001 and 2002. A Fraud Investigator was also hired.

**Annual PHA Plan- Fort Myers Housing Authority
PHA Fiscal Year 2003**

[24 CFR Part 903.7]

i. Annual Plan Type:

Select which type of Annual Plan the PHA will submit.

Standard Plan

Streamlined Plan:

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

Troubled Agency Plan

ii. Executive Summary of the Annual PHA Plan

[24 CFR Part 903.7 9 (r)]

Provide a brief overview of the information in the Annual Plan, including highlights of major initiatives and discretionary policies the PHA has included in the Annual Plan.

The Housing Authority of the City of Fort Myers has developed its Annual and 5 yr Plans in concert with the County's Consolidated Plan to address affordable housing needs for low income residents of Fort Myers by operating safe, secure housing and providing programs that support and encourage economic self-sufficiency opportunities for residents. As part of its planning, the Housing Authority developed a set of goals and objectives which are designed to provide a comprehensive approach to accomplishing its overall mission. One facet of the plan provides for an on-going review of all FMHA operations to improve service delivery, achieve maximum fiscal prudence and maximize revenue from both conventional and non-conventional sources. The FMHA will continue focusing on increasing resident involvement; providing safety and security; and improving neighborhood appearance.

During FFY 2002, the HACFM followed the new HUD mandates concerning voluntary resident participation in the Community Service Program. Residents were notified in meetings, by mail and by notices posted throughout the HA. Appropriate changes were made to reflect this change in the PH Admissions policy and lease documents.

During FFY 2002, the HACFM saw its waiting list increase to 847 with the annual turnover at 380. The percentage of Very Low Income applicants rose from 12.5% to 30%, while the percentage of Extremely Low Income applicants declined from 84% as reported last year to 65% during FFY 2002. The percentage of Low Income applicants has remained steady, increasing marginally from 3.5% to 5%. The waiting list has seen an increase in the number of elderly family applicants from 15% to 21%, and the number of families with children increased from 55% to 64%. While last year, the waiting list for 1 BR units increased from 39% to 46%, during FFY 2002, it

decreased to 22% of the waiting list. Meanwhile, the demand for 2 BR units during FFY 2002 increased from 29% to 37%, the demand for 3 bedroom has increased from 18% to 22%; for 4 bedroom the demand has increased from 4% to 13%; and 5 bedroom + increased from 3% to 6%.

The Housing Authority's family public housing developments all fall within the HUD approved income and racial deconcentration initiatives. The average income at Michigan Court is 3% below the income average for all family public housing developments. The income average for Palmetto is 15% below the income average for all family public housing developments. The average income for Southward Village is 12% above the average income of all the family PH developments. All fall within the 85% to 115% range.

The Housing Authority will request HUD to designate three of its developments as "Elderly Only." These are Bonair Towers, Royal Palm Towers and Flossie M. Riley Garden Apartments. An application for designation will be submitted in December, 2002.

During FFY 2003, the HACFM will, with its newly hired Executive Director, continue to concentrate on achieving operational excellence as reflected in the goals and objectives.

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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

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Attachments

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

Required Attachments:

- Admissions Policy for Deconcentration
- FFY 2003 Capital Fund Program Annual Statement fl047a01
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

Optional Attachments:

- PHA Management Organizational Chart
- FFY 2003 Capital Fund Program & 5 Year Action Plan- fl047a01
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text). **Included in PHA Plan Text.**
- Other (List below, providing each attachment name)
 - fl047b01 – P & E Report FY2001 CFP #FL14P04750101
 - fl047c01 – P & E Report FY 2002 CFP #FL14P04750102

Supporting Documents Available for Review

Indicate which documents are available for public review by placing a mark in the “Applicable & On Display” column in the appropriate rows. All listed documents must be on display if applicable to the program activities conducted by the PHA.

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	5 Year and Annual Plans
X	Consolidated Plan for the jurisdiction/s in which the PHA is 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
	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
	Section 8 rent determination (payment standard) policies <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach	Annual Plan: Operations and Maintenance

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	infestation)	
X	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
	Section 8 informal review and hearing procedures <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
X	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
X	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 *Voluntary Conversion Analysis	Annual Plan: Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
	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
X	The most recent Public Housing Drug Elimination Program (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional)	(specify as needed)

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	(list individually; use as many lines as necessary)	

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

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

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

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	2,056	5	5	N/A	N/A	N/A	N/A
Income >30% but <=50% of AMI	1,6123	5	5	N/A	N/A	N/A	N/A
Income >50% but <80% of AMI	2,020	4	4	N/A	N/A	N/A	N/A
Elderly	1,349	5	5	N/A	N/A	N/A	N/A
Families with Disabilities	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Race/Ethnicity European/American	2,979	5	5	N/A	N/A	N/A	N/A
Race/Ethnicity African American	2,224	5	5	N/A	N/A	N/A	N/A
Race/Ethnicity Hispanic	434	5	5	N/A	N/A	N/A	N/A
Race/Ethnicity							

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

- Consolidated Plan of the Jurisdiction/s
Indicate year:
- U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") dataset **1990 CHAS Data Book 10/14/01**

- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information) **Market Study for the Fort Myers Housing Authority, December, 1999, by National Facility Consultants, Inc., on file at the main office of the FMHA.**

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/>	Section 8 tenant-based assistance		
<input checked="" type="checkbox"/>	Public Housing		
<input type="checkbox"/>	Combined Section 8 and Public Housing		
<input type="checkbox"/>	Public Housing Site-Based or sub-jurisdictional waiting list (optional)		
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	847		380
Extremely low income <=30% AMI	549	65%	
Very low income (>30% but <=50% AMI)	254	30%	
Low income (>50% but <80% AMI)	44	5%	
Families with children	549	64%	
Elderly families	181	21%	
Families with Disabilities	117	13.8%	
Race/ethnicity European/American	164	19%	
Race/ethnicity	683	80%	

Housing Needs of Families on the Waiting List			
African American			
Race/ethnicity			
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	191	22%	132
2 BR	316	37%	104
3 BR	184	22%	88
4 BR	108	13%	39
5 BR	32	4%	15
5+ BR	15	2%	2
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

C. Strategy for Addressing Needs

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

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

Select all that apply

- Employ effective maintenance and management policies to minimize the number of public housing units off-line
- Reduce turnover time for vacated public housing units
- Reduce time to renovate public housing units
- Seek replacement of public housing units lost to the inventory through mixed finance development
- Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources
- Maintain or increase section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction

- Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- Maintain or increase section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- Maintain or increase section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program
- Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- Other (list below)

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select all that apply

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

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

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

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

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

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

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

Select if applicable

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

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

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

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

(2) Reasons for Selecting Strategies

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

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

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

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

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FFY 2003 grants)		
a) Public Housing Operating Fund	2,380,466	
b) Public Housing Capital Fund	1,811,817	
c) HOPE VI Revitalization	0	
d) HOPE VI Demolition	0	
e) Annual Contributions for Section 8 Tenant-Based Assistance	0	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	0	

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
g) Resident Opportunity and Self-Sufficiency Grants *Elderly Service Coordinator	42,600	
h) Community Development Block Grant	0	
i) HOME	0	
Other Federal Grants (list below)		
2. Prior Year Federal Grants (unobligated funds only) (list below)		
CFP FFY 2002	1,554,379	
DEP FFY 2001	84,839	
3. Public Housing Dwelling Rental Income	1,099,896	
4. Other income (list below)		
4. Non-federal sources (list below)		
Total resources	6,973,997	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.7 9 (c)]

A. Public Housing

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

(1) Eligibility

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

- When families are within a certain number of being offered a unit: (state number)
- When families are within a certain time of being offered a unit: (state time)
- Other: (describe) **At the time of application**

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

- Criminal or Drug-related activity
- Rental history
- Housekeeping
- Other (describe)

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

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

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

(2)Waiting List Organization

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

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

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

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

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

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

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

If yes, how many lists?

3. Yes No: May families be on more than one list simultaneously
If yes, how many lists?
4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?
- PHA main administrative office
 - All PHA development management offices
 - Management offices at developments with site-based waiting lists
 - At the development to which they would like to apply
 - Other (list below)

(3) Assignment

- a. How many vacant unit choices are applicants ordinarily given before they fall to the bottom of or are removed from the waiting list? (select one)
- One
 - Two
 - Three or More
- b. Yes No: Is this policy consistent across all waiting list types?
- c. If answer to b is no, list variations for any other than the primary public housing waiting list/s for the PHA:

(4) Admissions Preferences

- a. Income targeting:
- Yes No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?
- b. Transfer policies:
- In what circumstances will transfers take precedence over new admissions? (list below)
- Emergencies
 - Overhoused
 - Underhoused
 - Medical justification
 - Administrative reasons determined by the PHA (e.g., to permit modernization work)
 - Resident choice: (state circumstances below)
 - Other: (list below) **The FMHA ha a policy on transfers**

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

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

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

- 1 Date and Time
- 2 Working Families
- 3 Victims of Domestic Violence

Former Federal preferences:

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

Homelessness
High rent burden

Other preferences (select all that apply)

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

4. Relationship of preferences to income targeting requirements:

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

(5) Occupancy

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

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

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

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

(6) Deconcentration and Income Mixing

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

If yes, continue to the next question.

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

Deconcentration Policy for Covered Developments

Deconcentration Policy for Covered Developments			
Development Name:	Number of Units	Explanation (if any) (See Step 4 at '903.2 (c) (1) (iv))	Deconcentration Policy (if no explanation) (see Step 5 at '903.2 (c) (1) (v))
None			

FMHA INCOME DECONCENTRATION ANALYSIS

	Total Income	Total Households	Averages	Percent of Average	Variance
MICHIGAN	\$2,628,892	329	\$7,991	97%	-3%
SOUTHWARD	\$1,754,813	190	\$9,235	112%	+12%
PALMETTO	\$662,173	94	\$7,044	85%	-15%
TOTALS	\$5,045,878	613	\$8,231	100%	N/A

SEGMENTED INCOME DISTRIBUTION BY PERCENT

	\$0-\$5,000	\$5,001 - \$10,000	\$10,001 - \$15,000	\$15,001 - \$20,000	\$20,001 - \$25,000	\$25,001 \$30,000+
MICHIGAN	129	89	38	18	9	6
SOUTHWARD	51	67	14	8	2	2
PALMETTO	41	27	14	8	2	2

OBSERVATIONS

- 1) The average household income for the 613 households in family PH developments is \$8,231
- 2) Michigan Court is 3% under this average and Palmetto is 15% under this average.
- 3) Southward is 12% above the average.

4) There is little difference between the three developments in the ranges above \$10,001.

5) The small variations in income between the overall average and the individual averages of the three developments is not significant. We expect to continue to see minor variations between these three developments because of the following:

A) All new tenants are drawn from a single list. A run of higher or lower income families filling vacancies at any one of these three developments may temporarily skew these averages to a small degree.

B) Existing incomes are variable. They may increase or decrease during a period. These alterations are usually not evenly spread, and may affect families in any development disproportionately.

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a. Yes No: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?

b. Yes No: Did the PHA adopt any changes to its **admissions policies** based on the results of the required analysis of the need to promote deconcentration of poverty or to assure income mixing?

c. If the answer to b was yes, what changes were adopted? (select all that apply)

Adoption of site based waiting lists
If selected, list targeted developments below:

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

Employing new admission preferences at targeted developments
If selected, list targeted developments below:

Other (list policies and developments targeted below)

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

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

- Additional affirmative marketing
- Actions to improve the marketability of certain developments
- Adoption or adjustment of ceiling rents for certain developments
- Adoption of rent incentives to encourage deconcentration of poverty and income-mixing
- Other (list below)

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

- Not applicable: results of analysis did not indicate a need for such efforts
- List (any applicable) developments below:

g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower-income families? (select all that apply)

- Not applicable: results of analysis did not indicate a need for such efforts
- List (any applicable) developments below:

B. Section 8

Exemptions: PHAs that do not administer section 8 are not required to complete sub-component 3B. **Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

(1) Eligibility

a. What is the extent of screening conducted by the PHA? (select all that apply)

- Criminal or drug-related activity only to the extent required by law or regulation
- Criminal and drug-related activity, more extensively than required by law or regulation
- More general screening than criminal and drug-related activity (list factors below)
- Other (list below)

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

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

- d. Yes No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)
- e. Indicate what kinds of information you share with prospective landlords? (select all that apply)
- Criminal or drug-related activity
- Other (describe below)

(2) Waiting List Organization

- a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (select all that apply)
- None
- Federal public housing
- Federal moderate rehabilitation
- Federal project-based certificate program
- Other federal or local program (list below)
- b. Where may interested persons apply for admission to section 8 tenant-based assistance? (select all that apply)
- PHA main administrative office
- Other (list below)

(3) Search Time

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

If yes, state circumstances below:

(4) Admissions Preferences

- a. Income targeting
- Yes No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the section 8 program to families at or below 30% of median area income?
- b. Preferences
1. Yes No: Has the PHA established preferences for admission to section 8 tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent **(5) Special purpose section 8 assistance programs**)

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

Former Federal preferences

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

Other preferences (select all that apply)

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

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

Date and Time

Former Federal preferences

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in your jurisdiction

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

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

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

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

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

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

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

(5) Special Purpose Section 8 Assistance Programs

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

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

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

- Through published notices
- Other (list below)

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

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

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

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

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

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

- For the earned income of a previously unemployed household member
- For increases in earned income

- Fixed amount (other than general rent-setting policy)
If yes, state amount/s and circumstances below:
- Fixed percentage (other than general rent-setting policy)
If yes, state percentage/s and circumstances below:
- For household heads
- For other family members
- For transportation expenses
- For the non-reimbursed medical expenses of non-disabled or non-elderly families
- Other (describe below)

e. Ceiling rents

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

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

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

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

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

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

f. Rent re-determinations:

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

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

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

(2) Flat Rents

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

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

Market Study and Rent Analysis

B. Section 8 Tenant-Based Assistance

Exemptions: PHAs that do not administer Section 8 tenant-based assistance are not required to complete sub-component 4B. **Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

(1) Payment Standards

Describe the voucher payment standards and policies.

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

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

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

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

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

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

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

- Annually
- Other (list below)

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

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

(2) Minimum Rent

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

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

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

5. Operations and Management

[24 CFR Part 903.7 9 (e)]

Exemptions from Component 5: High performing and small PHAs are not required to complete this section. Section 8 only PHAs must complete parts A, B, and C(2)

A. PHA Management Structure

Describe the PHA's management structure and organization.

(select one)

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

The FMHA is governed by a 7 member board appointed by the City Mayor. The Board hires an executive director who manages the authority's day to day operations.

B. HUD Programs Under PHA Management

List Federal programs administered by the PHA, number of families served at the beginning of the upcoming fiscal year, and expected turnover in each. (Use "NA" to indicate that the PHA does not operate any of the programs listed below.)

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	961	200
Section 8 Vouchers		
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers (list individually)		
Public Housing Drug Elimination Program (PHDEP)(FFY 2001)	961	200
Other Federal Programs(list individually)		
Capital Fund	961	200
ROSS Eld Serv Coord.	322	10 to 15%

C. Management and Maintenance Policies

List the PHA's public housing management and maintenance policy documents, manuals and handbooks that contain the Agency's rules, standards, and policies that govern maintenance and management of public housing, including a description of any measures necessary for the prevention or eradication of pest infestation (which includes cockroach infestation) and the policies governing Section 8 management.

- (1) Public Housing Maintenance and Management: (list below)
FMHA Admissions and Occupancy Policy Manual

- (2) Section 8 Management: (list below) N/A

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

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

A. Public Housing

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

If yes, list additions to federal requirements below:

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

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

B. Section 8 Tenant-Based Assistance

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

If yes, list additions to federal requirements below:

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

- PHA main administrative office
 Other (list below)

7. Capital Improvement Needs

[24 CFR Part 903.7 9 (g)]

Exemptions from Component 7: Section 8 only PHAs are not required to complete this component and may skip to Component 8.

A. Capital Fund Activities

Exemptions from sub-component 7A: PHAs that will not participate in the Capital Fund Program may skip to component 7B. All other PHAs must complete 7A as instructed.

(1) Capital Fund Program Annual Statement

Using parts I, II, and III of the Annual Statement for the Capital Fund Program (CFP), identify capital activities the PHA is proposing for the upcoming year to ensure long-term physical and social viability of its public housing developments. This statement can be completed by using the CFP Annual Statement tables provided in the table library at the end of the PHA Plan template **OR**, at the PHA's option, by completing and attaching a properly updated HUD-52837.

Select one:

The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name) fl047a01

-or-

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

(2) Optional 5-Year Action Plan

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

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

b. If yes to question a, select one:

The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state name) fl047a01

-or-

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

a. Yes No: Is the PHA providing an P & E Report for the Capital Fund for reporting period 12/31/2002_ **fl047b01** _____? (if no, skip to sub-component 7B)

b. If yes to question a, select one:

The Capital Fund Program P & E Report for FY 2001 is provided as an attachment to the PHA Plan at Attachment (state name) fl047b01 and P & E report for FY2002 fl047.c01

-or-

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

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

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

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

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

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

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

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

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

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

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

2. Activity Description

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

Demolition/Disposition Activity Description
1a. Development name: 1b. Development (project) number:
2. Activity type: Demolition <input type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: <u>(DD/MM/YY)</u>
5. Number of units affected: 6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: b. Projected end date of activity:

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

[24 CFR Part 903.7 9 (i)]

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

1. Yes No: Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities

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

2. Activity Description

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

Designation of Public Housing Activity Description
1a. Development name: BONAIR TOWERS 1b. Development (project) number: fl047-002
2. Designation type: Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA’s Designation Plan <input type="checkbox"/> Submitted, pending approval <input checked="" type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, <u>submitted</u> , or planned for submission: <u>(16/12/02</u> <u>DD/MM/YY)</u>
5. If approved, will this designation constitute a (select one) <input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected: 101 7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

Designation of Public Housing Activity Description
1a. Development name: ROYAL PALM TOWERS 1b. Development (project) number: fl047-004
2. Designation type: Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/>

Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA's Designation Plan <input type="checkbox"/> Submitted, pending approval <input checked="" type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <u>(16/12/02</u> <u>DD/MM/YY)</u>
5. If approved, will this designation constitute a (select one) <input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
7. Number of units affected: 101 7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

Designation of Public Housing Activity Description
1a. Development name: FLOSSIE M.RILEY GARDEN APARTMENTS 1b. Development (project) number: FL047-006
2. Designation type: Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA's Designation Plan <input type="checkbox"/> Submitted, pending approval <input checked="" type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <u>(16/12/02</u> <u>DD/MM/YY)</u>
5. If approved, will this designation constitute a (select one) <input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
8. Number of units affected: 120 7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

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

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

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

2. Activity Description

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

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

<input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units <input type="checkbox"/> Other: (describe below)
--

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

Voluntary Conversion Initial Assessments

- a. How many of the PHA’s developments are subject to the Required Initial Assessments? **3**
- b. How many of the PHA’s developments are not subject to the Required Initial Assessments based on exemptions (e.g., elderly and/or disabled development not general occupancy projects)? **3**
- c. How many Assessments were conducted for the PHA’s covered developments? **3**
- d. Identify PHA developments that may be appropriate for conversion based on the Required Initial Assessments:
None were identified.

Development Name	Number of Units
None	

- e. If the PHA has not completed the Required Initial Assessments, describe the status of these assessments.
The three completed assessments are on file at the FMHA main office.

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

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

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

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

2. Activity Description

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

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

B. Section 8 Tenant Based Assistance

1. Yes No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as

implemented by 24 CFR part 982 ? (If “No”, skip to component 12; if “yes”, describe each program using the table below (copy and complete questions for each program identified), unless the PHA is eligible to complete a streamlined submission due to high performer status. **High performing PHAs** may skip to component 12.)

2. Program Description:

a. Size of Program

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

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

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

b. PHA-established eligibility criteria

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

If yes, list criteria below:

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (1)]

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

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

Yes No: Has the PHA has entered into a cooperative agreement with the TANF Agency, to share information and/or target supportive services (as contemplated by section 12(d)(7) of the Housing Act of 1937)?

If yes, what was the date that agreement was signed? DD/MM/YY

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

Client referrals

- Information sharing regarding mutual clients (for rent determinations and otherwise)
- Coordinate the provision of specific social and self-sufficiency services and programs to eligible families
- Jointly administer programs
- Partner to administer a HUD Welfare-to-Work voucher program
- Joint administration of other demonstration program
- Other (describe)

B. Services and programs offered to residents and participants

(1) General

a. Self-Sufficiency Policies

Which, if any of the following discretionary policies will the PHA employ to enhance the economic and social self-sufficiency of assisted families in the following areas? (select all that apply)

- Public housing rent determination policies
- Public housing admissions policies
- Section 8 admissions policies
- Preference in admission to section 8 for certain public housing families
- Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA
- Preference/eligibility for public housing homeownership option participation
- Preference/eligibility for section 8 homeownership option participation
- Other policies (list below)

b. Economic and Social self-sufficiency programs

- Yes No: Does the PHA coordinate, promote or provide any programs to enhance the economic and social self-sufficiency of residents? (If “yes”, complete the following table; if “no” skip to sub-component 2, Family Self Sufficiency Programs. The position of the table may be altered to facilitate its use.)

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

<i>Elderly Services Coordinator</i>	322	<i>All elderly Public Housing residents</i>	<i>On site, full time coordinator</i>	<i>Public Housing participants</i>

(2) Family Self Sufficiency program/s

a. Participation Description

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

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

C. Welfare Benefit Reductions

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)

- Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies
- Informing residents of new policy on admission and reexamination
- Actively notifying residents of new policy at times in addition to admission and reexamination.
- Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
- Establishing a protocol for exchange of information with all appropriate TANF agencies
- Other: (list below)

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

COMMUNITY SERVICE PROGRAM IMPLEMENTATION

During FY 2002, the Fort Myers Housing Authority undertook the following activities per the newly adopted HUD regulations changing the requirements of the Community Service program and making it voluntary resident participation:

IN-HOUSE PROGRAM DEVELOPMENT AND STAFF TRAINING

- Held training classes for staff, including Development Managers, to advise them of new HUD regulations on voluntary resident participation in the program. Trained staff how to respond to questions from residents.
- Notified residents through certified letters of HUD's newly adopted regulations making the program voluntary for residents.
- Drafted and posted appropriate Public Notices about the new regulations concerning the Community Service Program being voluntary to inform all Residents throughout the Fort Myers Housing Authority developments.
- Placed the item on the agenda of Resident Council Meetings to give residents an opportunity to understand the newly adopted HUD regulations making the program voluntary and to answer their questions and advise that the FMHA would continue to provide tracking of service for residents who wished to participate in the program voluntarily.
- Advised staff to maintain the newly developed internal filing system and reporting system so Housing Managers can regularly track and verify completion of any community service programs completed by residents who wish to voluntarily participate in the program.
- Advised staff to maintain the listing from the Volunteer Center of Lee County of non-profits in the Fort Myers area who were willing to participate in offering community service activities to residents who wish to voluntarily participate and who were approved by the Senior Friendship Centers of Lee County and the United Way of Lee County.
- Reviewed the lease to ensure compliance with new CS requirements
- Prepared an article on the changes in the Community Service Program for the Newsletter to inform all residents that the program was now voluntary.

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.7 9 (m)]

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

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

1. Describe the need for measures to ensure the safety of public housing residents
(select all that apply)

- High incidence of violent and/or drug-related crime in some or all of the PHA's developments
- High incidence of violent and/or drug-related crime in the areas surrounding or adjacent to the PHA's developments
- Residents fearful for their safety and/or the safety of their children
- Observed lower-level crime, vandalism and/or graffiti
- People on waiting list unwilling to move into one or more developments due to perceived and/or actual levels of violent and/or drug-related crime
- Other (describe below)

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

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

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

Michigan Court, Palmetto Court, and Southward Village

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

1. List the crime prevention activities the PHA has undertaken or plans to undertake: (select all that apply)

- Contracting with outside and/or resident organizations for the provision of crime- and/or drug-prevention activities
- Crime Prevention Through Environmental Design
- Activities targeted to at-risk youth, adults, or seniors
- Volunteer Resident Patrol/Block Watchers Program
- Other (describe below)

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

All public housing 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: (select all that apply)

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

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

All developments are affected.

D. Additional information as required by PHDEP/PHDEP Plan

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

* NOTE : THIS SECTION DOES NOT APPLY FOR FFY 2003 AS THERE IS NO PHDEP AVAILABLE FROM HUD.

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

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

The FMHA has adopted a pet policy covering all units, elderly and family. The policy (Section 18) is on file at the main office of the housing authority and does not apply to pets that are used to assist persons with disabilities. A summary of the main aspects of the policy are as follows:

- Pets are limited to domesticated dogs, cats, birds and fish in aquariums. The Housing Authority reserves the right to limit size and number. Animals deemed to be potentially harmful to health or safety of others will not be allowed (including attack or fight trained dogs – pit bulls). Residents in all units must register pets with the Community Services Bureau by submitting a Pet

Registration Form with a photo of the pet. Owners must provide records to the Property Managers that pet is properly inoculated and licensed and also provide name and phone number of individual who will be responsible for the pet in event of resident absence or illness.

- A non-refundable security deposit of \$100 is required for elderly facilities. A non-refundable security deposit of \$250 is required for family developments, along with verification of a liability insurance policy covering the pet at time of registering the pet.
- Owners are liable for amount of all damages to FMHA caused by their pet. Owners shall be liable for entire amount of injury to person or property of other residents, staff or visitors caused by their pet and shall indemnify FMHA for all cost of litigation and attorney's fees resulting from damage.
- Owners must maintain pets in living quarters in manner to prevent odors and other unsanitary conditions in owner's unit and surrounding areas.
- Complaints regarding pets disturbing neighbors will result in owner having to remove the pet or owner eviction.
- Owners must keep pets in owner's apartment or on leash at all times when outside. No outdoor cages are allowed.
- Pets are allowed only on designated pet areas on the grounds. Owners must clean up after their pets and are responsible for disposing of pet waste. Animals are not allowed in common rooms or dining rooms and should be carried if possible in elevators.
- Pets cannot be left unattended on a lease connected to clotheslines, poles or any object outdoors.
- If work is to be done in a pet owners unit, the owner must either be home or arrange for pet to be contained or removed from the unit.

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

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

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

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

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

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

1. Yes No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock , including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have **not** been addressed elsewhere in this PHA Plan?

2. What types of asset management activities will the PHA undertake? (select all that apply)
 - Not applicable
 - Private management
 - Development-based accounting
 - Comprehensive stock assessment
 - Other: (list below)

3. Yes No: Has the PHA included descriptions of asset management activities in the **optional** Public Housing Asset Management Table?

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

1. Yes No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
Meetings were held at Michigan Court on 12/4/01; Palmetto Court on 11/29/01; Palmetto Court on 11/19/01; Southward Village on 11/19/01; Royal Palm Towers on 11/13/01; and Flossie M. Riley Garden Apartments on 11/13/01.

2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
 - Attached at Attachment (File name)
 - Provided below:
Resident comments from these six resident meetings all concerned specific items such as improving floor coverings, prohibiting bikes on sidewalks, looking into installing canopies over entry doors; installing a gazebo or pavilion; ensuring smoke alarms work; removal or reconnection of old heater system; replacing faucets in bathrooms; training on how to use fire

extinguishers; dryer hookups; broken playground equipment; removal of one-way signs; dirty bathtubs; installing speed bumps at C-Street and Delaware; installing GFI's in bathrooms; signage for Palmetto Court; fencing in various blocks with chain link fence; Teen-Parenting Counseling classes; range-hoods over stove area; and more lighting. Additionally, a three page written list of suggestions from a resident was also received concerning CPF expenditures. This memo and the minutes of the six meetings are on file at the main office of the HACFM.

At the Public Hearing on the Plan, the RAB Board submitted a nine page document (on file at the main office of the HACFM) detailing the following issues:

Economic Empowerment. Residents wanted the Housing Authority to give priority in hiring qualified PH residents over non-residents for HA jobs. Residents asked for 30% of all new hires to go to low-income households with a preference given to PH residents. Residents asked that preference in hiring outside contractors be given to those which provide significant employment opportunities to PH residents.

Unutilized Tenant Participation Funds. Residents wanted accounting of FY 2001-2002 funds and involvement in developing a plan to use the FY 2003 funds.

Elderly Only Developments. Residents asked for "Elderly Only" designation of three of its Public Housing developments – Bonair Towers, Royal Palm Towers, and Flossie M. Riley Garden Apartments.

Admission Preferences: Residents wanted preference given to greatest need without preference for "working families." Residents want preference for (A) Those who had been evicted for Criminal Activity but later acquitted; (B) The Homeless; (C) Those who pay more than 50% of their income on rent; and (D) Victims of Domestic Violence.

Employee Criminal History: Residents want employees of HACFM to meet same criminal history standards as residents.

Grievance Board: Residents want a Resident Rep included on HACFM Grievance Board.

Earned Income Disregard: Residents asked that increases in income be ignored in cases where:

- a) Family member gets a job
- b) Family member gets welfare in last six months
- c) Earnings are increased from self sufficiency program or substance abuse program

Substantial Deviation Definition: Residents asked that the definition of substantial modification or amendment be changed to give the RAB an assurance of input throughout the year. The definition of Significant Modification should include specific examples. Specifically, the RAB would like the HS to ensure that changes in Rent Policies, Admissions Policies, Demolition Plans, and any changes to tenant leases be considered "substantial modifications" to the plan, per se.

Applicant's Criminal History. Residents want HACFM to consider no more than 5

years in the past.

Readmit Residents. Residents want those residents evicted for criminal activity but later acquitted at a criminal trial given highest priority in admissions to public housing.

Household Members. Residents want household members permitted to remain residents when a household member is accused of one-strike and removed from the lease.

Security Concern. Residents noted the gate was left open late into the night, allowing uninvited people to enter the complex.

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

- Considered comments, but determined that no changes to the PHA Plan were necessary.
- The PHA changed portions of the PHA Plan in response to comments
List changes below:
- Clarified definition of “Substantial modification or amendment” in the Plan by adding the phrase: “All significant modifications require full public process.”
 - Amended the proposed CFP to include improvements noted in resident remarks

Other: (list below)

All comments relating to the CFP were reviewed and considered by staff and the Board Finance Committee in conjunction with developing the FY 2002 CFP and the 5-year CFP.

All other comments were taken under advisement by the HACFM Board which will review the suggestions and meet further with the RAB Board to clarify and discuss them. In meetings with the RAB, it will be noted that changes they have suggested to lease, rent policies, admission preferences, or grievance policy would require amendments to the HACFM P.H. Admissions and Occupancy Policy. The Board is in favor of adding a resident representative to the Grievance Committee. This change to the Grievance Policy and any other changes the Board decides to make to the lease, rent policies, or admission preferences would then go through the full public process as required by all significant modifications for amendments to the PH Admissions and Occupancy Policy. An integral part of this process is the Public Hearing requirement, in which both Public Housing residents and the general public are ensured participation prior to adoption of any proposed changes.

The resident suggestion for Elderly Only designation is already incorporated into the Plan. Some resident suggestions re: employment opportunities already comply with Section 3. The Director will further discuss these with the RAB.

Security concerns were reviewed by the Director and passed on to appropriate staff for action.

The Executive Director will review with RAB the job training and development programs available through the Neighborhood Network at the HACFM, through the ROSS Grant on Resident Initiatives, and through supportive local social service partners in the Fort Myers area.

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

- 1. Yes No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)

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

3. Description of Resident Election Process

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

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

b. Eligible candidates: (select one)

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

c. Eligible voters: (select all that apply)

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

C. Statement of Consistency with the Consolidated Plan

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

1. Consolidated Plan jurisdiction: (provide name here) **CITY OF FORT MYERS**
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
 - The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
 - The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
 - The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
 - Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
 - Other: (list below)
4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

The Consolidated Plan supports the PHA Plan by signing off on consistency with all Federal grants and by inviting PHA participation in planning process.

D. Other Information Required by HUD

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

1. Amendment and Deviation Definitions

24 CFR Part 903.7(r)

PHAs are required to define and adopt their own standards of substantial deviation from the 5-year Plan and Significant Amendment to the Annual Plan. The definition of significant amendment is important because it defines when the PHA will subject a change to the policies or activities described in the Annual Plan to full public hearing and HUD review before implementation.

In accordance with PIH notice 99-51 (HA) issued December 14, 1999, PHA's must define "substantial deviation" of Annual Plans from the 5-Year Plan and "significant amendment or modification" of the Annual Plan. The Quality Housing and Work Responsibility Act of 1998 requires that PHA's explain "substantial deviation" from the 5-Year Plan in their Annual Plans. The Act also provides that, while PHAs may change or modify their plans or policies described in them, any "significant deviation" to the plan would require PHAs to submit a revised PHA plan that has met full public process requirements.

The Housing Authority of the City of Fort Myers' definition of "substantial deviation" of Annual Plans from the 5-Year Plan and "significant amendment or modification" of the Annual Plan will consider the following to be significant amendments or modifications:

CRITERIA FOR DETERMINING SUBSTANTIAL DEVIATION AND SIGNIFICANT AMENDMENT OR MODIFICATION:

The Housing Authority of the City of Fort Myers, after submitting its Annual Plan to HUD, may modify, amend or change any policy, rule, regulation or other aspect of its plan. If any

item does not significantly change the Fort Myers Housing Authority’s Mission Statement and Goals and Objectives, then it shall not be considered a substantial deviation from the Plan. If any modifications, amendments or changes in any policy, rule, regulation or other aspect of the plan are not inconsistent with the Fort Myers Housing Authority Mission Statement, its Goals and Objectives, or HUD regulations, then these shall not be deemed significant amendments or modifications to the Annual and 5-Year Plan.

- A substantial change in goals identified in the Five-Year Plan.

Significant Amendment/Modification:

- Significant modifications to major strategies to address housing needs and to major policies (e.g., policies governing eligibility, selection or admissions and rent determination). All significant modifications require full public process.

A. Substantial Deviation from the 5-year Plan: None

B. Significant Amendment or Modification to the Annual Plan: None

2. Current Listing of the Board of Commissioners of the Housing Authority of the City of Fort Myers

Commissioner	Appointed	Term Ends
Mr. Mark Morris, Chairman First National Bank of Fort Myers 2915 Colonial Blvd.	04-01-01	03-06-03
Pastor Jonathan Gray, V. Chair Cornerstone Ministries 3220 Dr. Martin Luther King, Jr. Blvd.	04-01-01	03-06-03
Ms. Betty McDonald (Resident) 4224 Michigan Avenue #217	04-01-01	03-06-05
Mr. Bill Barnwell Farmers Market Restaurant 2736 Edison Avenue	04-01-01	03-06-05
Mr. Lemuel Teal P.O. Box 746	04-01-01	03-06-03
Mr. Peter Routsis- Arroyo Catholic Charities	04-01-01	03-06-02

**Diocese of Venice, Inc.
1000 Pinebrook Road, Venice**

**Mr. E. Bruce Strayhorn
Strayhorn & Strayhorn
2125 W. First Street**

03-07-98

03-06-02

<p>3. Current Listing of Resident Advisory Board of Southward Village Annex, Inc.</p>
--

**Mary Williams, President
3501 Dale Street, #C-13, Fort Myers, FL 33916**

**Ann English, Vice-President
4224 Michigan Ave., Fort Myers, FL 33916**

**Barbara Hail, Secretary
4258 Michigan Avenue, #1, Fort Myers, FL 33916**

**Sharia Spencer, Treasurer
4224 Michigan Ave #636, Fort Myers, FL 33916**

**Frances Saunders
4224 Michigan Ave #635, Fort Myers, FL 33916**

Attachments

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

Attachment files submitted electronically to HUD with this plan:

- (1) fl047a01 – Capital Fund Tables for FY 2003 –2007
- (2) fl047b01 – P & E Report FY 2001 CFP grant # FL14P04750101
- (3) fl047c01 – P & E Report FY 2002 CFP grant # FL14P04750102

Table Library

**PHA Plan
Table Library**

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

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

Capital Fund Grant Number:
FL14P04750103

FFY of Grant Approval: 04/2003

Original Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	\$ 272,000
3	1408 Management Improvements	\$ 156,600
4	1410 Administration	\$ 74,050
5	1411 Audit	\$ -
6	1415 Liquidated Damages	\$ -
7	1430 Fees and Costs	\$ 32,000
8	1440 Site Acquisition	\$ -
9	1450 Site Improvement	\$ 133,367
10	1460 Dwelling Structures	\$ 1,033,800
11	1465.1 Dwelling Equipment-Nonexpendable	\$ 50,000
12	1470 Nondwelling Structures	\$ 45,000
13	1475 Nondwelling Equipment	\$ 15,000
14	1485 Demolition	\$ -
15	1490 Replacement Reserve	\$ -
16	1492 Moving to Work Demonstration	\$ -
17	1495.1 Relocation Costs	\$ -
18	1498 Mod Used for Development	\$ -
19	1502 Contingency	\$ -
20	Amount of Annual Statement (Sum of lines 2-19)	\$ 1,811,817
21	Amount of line 20 Related to LBP Activities	\$ -
22	Amount of line 20 Related to Section 504 Compliance	\$ -
23	Amount of line 20 Related to Security	\$ -
24	Amount of line 20 Related to Energy Conservation Measures	\$ -

MANAGEMENT IMPROVEMENTS

In November 2002 we re-organized certain administrative and operational functions in order to enhance the

- Operating Reserve - Established plans for increasing the Housing Authority's reserve to meet PHAS score
- Resident Initiatives – Enhanced outreach programs to effectively communicate and train all residents locally
- Operational Improvements – Revised its' strategic plan to improve all operational needs, policies and procedures
- Community and Internal Safety Programs – Despite the elimination of the Public Housing Drug Elimination Program
- Vacancies – Instituted improved marketing techniques and approaches for preparing vacant units for occupancy

**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**

- Automation - Continued training on the operation of the automated systems and upgrade of systems.

The total Management Needs Assessments (including PHA-Wide 1408 and 1475) is estimated at \$1,000,00

**PHA Plan
Table Library**

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

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

overall performance of the Housing Authority of the City of Fort Myers, as follows:

es.

ated within all of the LHA's developments.

cedures to run more effectively and efficiently.

ion Grant, the Housing Authority will continue above baseline services presently being provided by the City of Fort Myers Poli

mpancy, determining renovation activities under 24CFR941, Subpart F, Admission and Continued Occupancy Policies and insc

**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**

0. These funds will go towards improving operations and developing efficiencies that should yield further savings.

**PHA Plan
Table Library**

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

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

ice Department.

ome exclusions.

Table Library

HUD 50075
OMB Approval No: 2577-0226
Expires: 03/31/2002

**PHA Plan
Table Library**

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

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

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
FL047-001 Southward Village	Flooring	1460	\$ 40,000
	Roofs	1460	\$ 300,000
	Total FL47-001 Southward Village		\$ 340,000
FL047-002 Bonair Towers	Elevator Modernization	1460	\$ 135,000
	Total FL47-002 Bonair Towers		\$ 135,000
FL047-003 Palmetto Court	Flooring (50 units)	1460	\$ 40,000
	Electric Meter Cans Upgrades	1460	\$ 55,000
	Sewer Rejuvenation	1460	\$ 30,000
	Total FL47-003 Palmetto Court		\$ 125,000
FL047-004 Royal Palm Towers			
	Total FL047-004		\$ -
FL047-006 Michigan Court	Modernization (family - 100 units)	1460	\$ 100,000
	Flooring (FMRGA)	1460	\$ 30,000
	Electric Meter Cans Upgrade	1460	\$ 75,000
	Total FL047-006		\$ 205,000
PHA WIDE	Operations	1406	\$ 272,000
	Computer software and support	1408	\$ 30,000
	Resident Initiatives	1408	\$ 50,000
	Operational Improvements	1408	\$ 20,000
	Training	1408	\$ 10,000
	Community/Internal Safety Program	1408	\$ 40,000
	HTVN	1408	\$ 6,600
	Moderinzation Coordinator	1410	\$ 27,300
	Modernization Office Clerk	1410	\$ 20,323
	Employee Benefits	1410	\$ 23,927
	Modernization Office Supplies	1410	\$ 2,500
	Fees and Costs	1430	\$ 30,000
	Project Costs	1430	\$ 2,000
	Landscaping	1450	\$ 50,000
	Security/Site Lighting	1450	\$ 20,000
	Recreational Facilities	1450	\$ 30,000
	Site Improvements	1450	\$ 33,367
	Interior/Exterior Painting	1460	\$ 148,800
	Prep units for Occupancy	1460	\$ 80,000
	Appliances	1465	\$ 50,000
	Admin. Bldg. Renov.	1470	\$ 25,000
	Resident Community Areas	1470	\$ 20,000
Computer Equipment	1475	\$ 15,000	
	Total PHA Wide		\$ 1,006,817
	Capital Fund Program FFY2003 Total		\$ 1,811,817

Capitol Fund Program Five-Year Action Plan

Part I: Summary

PHA Name : Housing Authority of the City of Fort Myers Florida				<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:	
Development Number/Name/HA-Wide	Year 1 FY2003	Work Statement for Year 2 FFY Grant: 2004 PHA FFY: 2005	Work Statement for Year 3 FFY Grant: 2005 PHA FFY: 2006	Work Statement for Year 4 FFY Grant: 2006 PHA FFY: 2007	Work Statement for Year 5 FFY Grant: 2007 PHA FFY: 2008
	Annual Statement				
FL47-001 Southward Village		\$ 494,549	\$ -	\$ -	\$ -
FL47-002 Bonair Towers		\$ -	\$ 200,000	\$ 280,000	\$ 280,000
FL47-003 Palmetto Court		\$ 55,000	\$ 150,000	\$ 150,000	\$ -
FL47-004 Royal Palm Towers		\$ -	\$ -	\$ -	\$ -
FL47-006 Michigan Court		\$ 276,264	\$ 528,264	\$ 486,871	\$ 646,886
PHA Wide		\$ 986,004	\$ 933,553	\$ 894,946	\$ 884,931
CFP Funds Listed for 5-year planning		\$ 1,811,817	\$ 1,811,817	\$ 1,811,817	\$ 1,811,817
Replacement Housing Factor Funds					

Capital Fund Program Five-Year Action Plan
Part II: Supporting Pages - Work Activities

Activities for Year 1	Activities for Year: <u>2</u> FFY Grant: 2004 PHA FY: 2005			Activities for Year: <u>3</u> FFY Grant: 2005 PHA FY: 2006		
See	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
Annual	FL47-001 Southward Village	Roofs	\$ 300,000	FL47-002 Bonair Towers	Window Repair	\$ 200,000
Statement	FL47-001 Southward Village	Electric Meter Cans Upgrades	\$ 80,000	FL47-003 Palmetto Court	Site Drainage	\$ 150,000
	FL47-001 Southward Village	Sewer Rejuvenation	\$ 50,000	FL47-006 Mchigan Court	Roofs (FMRGA)	\$ 410,000
	FL47-001 Southward Village	Flooring (50 Units)	\$ 64,549	FL47-006 Mchigan Court	Electric Meter Cans Upgrades	\$ 75,000
	FL47-003 Palmetto Court	Electric Meter Cans Upgrades	\$ 55,000	FL47-006 Mchigan Court	Emergency Lights (FMRGA)	\$ 40,000
	FL47-006 Mchigan Court	Modernization (Family 100 Units)	\$ 100,000	FL47-006 Mchigan Court	Window Security (FMRGA)	\$ 3,264
	FL47-006 Mchigan Court	Electric Meter Cans Upgrades	\$ 75,000	PHW Wide	Operations	\$ 272,000
	FL47-006 Mchigan Court	Window Security (FMRGA)	\$ 3,264	PHW Wide	Computer Software/Support	\$ 20,000
	FL47-006 Mchigan Court	Sewer Rejuvenation (FMRGA)	\$ 20,000	PHW Wide	Resident Initiatives	\$ 50,000
	FL47-006 Mchigan Court	Sewer Rejuvenation (MC Family)	\$ 78,000	PHW Wide	Operational Improvements	\$ 10,000
	PHW Wide	Operations	\$ 272,000	PHW Wide	Training	\$ 10,000
	PHA Wide	Computer Software/Support	\$ 20,000	PHW Wide	Comm/Internal Safety Program	\$ 40,000
	PHA Wide	Resident Initiatives	\$ 50,000	PHW Wide	HTVN	\$ 6,800
	PHA Wide	Operational Improvements	\$ 10,000	PHA Wide	Modernization Coord.	\$ 28,665
	PHA Wide	Training	\$ 10,000	PHW Wide	Modernization Office Clerk	\$ 21,339
	PHA Wide	Comm/Internal Safety Program	\$ 40,000	PHW Wide	Employee Benefits	\$ 18,900
	PHA Wide	HTVN	\$ 6,800	PHW Wide	Modernization Office Supplies	\$ 2,500
	PHA Wide	Modernization Coord.	\$ 28,665	PHW Wide	Fees and Costs	\$ 30,000
	PHA Wide	Modernization Office Clerk	\$ 21,339	PHW Wide	Project Costs	\$ 2,000
	PHA Wide	Employee Benefits	\$ 18,900	PHW Wide	Landscaping	\$ 50,000
	PHA Wide	Modernization Office Supplies	\$ 2,500	PHA Wide	Security/Site Lighting	\$ 20,000
	PHA Wide	Fees and Costs	\$ 30,000	PHA Wide	Recreational Facilities	\$ 20,000
Total CFP Estimated Cost			\$ 1,336,017			\$ 1,480,468

Capital Fund Program Five-Year Action Plan
Part II: Supporting Pages - Work Activities

Activities for Year 1	Activities for Year: <u>4</u> FFY Grant: 2006 PHA FY: 2007			Activities for Year: <u>5</u> FFY Grant: 2007 PHA FY: 2008		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	FL47-002 Bonair Towers	Window Repair	\$ 280,000	FL47-002 Bonair Towers	Window Repair	\$ 280,000
Annual	FL47-003 Palmetto Court	Site Drainage	\$ 150,000	FL47-006 Michigan Court	Roofs (MC Family)	\$ 643,622
Statement	FL47-006 Michigan Court	Site Drainage	\$ 95,000	FL47-006 Michigan Court	Window Security (FMRGA)	\$ 3,264
	FL47-006 Michigan Court	Roofs	\$ 388,607	PHA Wide	Operations	\$ 254,727
	FL47-006 Michigan Court	Window Security (FMRGA)	\$ 3,264	PHA Wide	Computer Software/Support	\$ 20,000
	PHA Wide	Operations	\$ 237,742	PHA Wide	Resident Initiatives	\$ 50,000
	PHA Wide	Computer Software/Support	\$ 20,000	PHA Wide	Operational Improvements	\$ 10,000
	PHA Wide	Resident Initiatives	\$ 50,000	PHA Wide	Training	\$ 10,000
	PHA Wide	Operational Improvements	\$ 10,000	PHA Wide	Comm/Internal Safety Program	\$ 40,000
	PHA Wide	Training	\$ 10,000	PHA Wide	HTVN	\$ 6,800
	PHA Wide	Comm/Internal Safety Program	\$ 40,000	PHA Wide	Modernization Coord.	\$ 28,665
	PHA Wide	HTVN	\$ 6,800	PHA Wide	Modernization Office Clerk	\$ 21,339
	PHA Wide	Modernization Coord.	\$ 28,665	PHA Wide	Employee Benefits	\$ 18,900
	PHA Wide	Modernization Office Clerk	\$ 21,339	PHA Wide	Modernization office supplies	\$ 2,500
	PHA Wide	Employee Benefits	\$ 18,900	PHA Wide	Fees and Costs	\$ 30,000
	PHA Wide	Modernization office supplies	\$ 2,500	PHA Wide	Project Costs	\$ 2,000
	PHA Wide	Fees and Costs	\$ 30,000	PHA Wide	Landscaping	\$ 50,000
	PHA Wide	Project Costs	\$ 2,000	PHA Wide	Security/Site Lighting	\$ 20,000
	PHA Wide	Landscaping	\$ 50,000	PHA Wide	Recreationa Facilities	\$ 20,000
	PHA Wide	Security/Site Lighting	\$ 20,000	PHA Wide	Site Improvements	\$ 30,000
	PHA Wide	Recreationa Facilities	\$ 20,000	PHA Wide	Int/Exterior Painting	\$ 100,000
	PHA Wide	Site Improvements	\$ 30,000	PHA Wide	Prep Units for Occup	\$ 60,000
	PHA Wide	Int/Exterior Painting	\$ 122,000	PHA Wide	Appliances	\$ 50,000
	PHA Wide	Prep Units for Occup	\$ 65,000	PHA Wide	Admin Bldg. Renov	\$ 25,000
	PHA Wide	Appliances	\$ 50,000	PHA Wide	Resident Common Areas	\$ 20,000
	PHA Wide	Admin Bldg. Renov	\$ 25,000	PHA Wide	Computer Equipment	\$ 15,000
	PHA Wide	Resident Common Areas	\$ 20,000			
	PHA Wide	Computer Equipment	\$ 15,000			
Total CFP Estimated Cost			\$ 1,811,817			\$ 1,811,817

Housing Authority of the City of Fort Myers, Florida

Capital Fund Grant Number:

FFY of Grant Approval: 04/2001

FL14P04750101

P & E Report 09/30/02

Line No.	Summary by Development Account	Total Rev 1 Estimated Cost	Total Obligated Cost	Budget Rev 2	Total Expended	Budget vs. Expense	Total Draws	Draws Vs. Expense	Draws Vs. Budget
1	Total Non-CGP Funds								
2	1406 Operations	\$170,000.00	\$170,000.00	\$170,000.00	(\$170,000.00)	\$0.00	\$170,000.00	\$0.00	\$0.00
3	1408 Management Improvements	\$214,400.00	\$214,400.00	\$214,400.00	(\$214,400.00)	\$0.00	\$214,400.00	\$0.00	\$0.00
4	1410 Administration	\$155,500.00	\$155,500.00	\$155,500.00	(\$155,500.00)	\$0.00	\$155,500.00	\$0.00	\$0.00
5	1411 Audit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	1415 Liquidated Damages	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	1430 Fees and Costs	\$42,000.00	\$32,491.97	\$32,491.97	(\$32,491.97)	\$0.00	\$26,986.98	(\$5,504.99)	\$5,504.99
8	1440 Site Acquisition	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9	1450 Site Improvement	\$392,067.00	\$392,067.00	\$392,067.00	(\$192,645.26)	\$199,421.74	\$217,984.44	\$25,339.18	\$174,082.56
10	1460 Dwelling Structures	\$674,450.00	\$690,831.00	\$690,831.00	(\$690,831.00)	\$0.00	\$681,908.87	(\$8,922.13)	\$8,922.13
11	1465.1 Dwelling Equipment-Nonexpendable	\$90,000.00	\$122,519.00	\$122,519.00	(\$122,519.00)	\$0.00	\$118,138.02	(\$4,380.98)	\$4,380.98
12	1470 Nondwelling Structures	\$159,000.00	\$123,582.39	\$123,582.39	(\$110,050.19)	\$13,532.20	\$114,549.70	\$4,499.51	\$9,032.69
13	1475 Nondwelling Equipment	\$30,000.00	\$26,025.64	\$26,025.64	(\$26,025.64)	\$0.00	\$30,000.00	\$3,974.36	(\$3,974.36)
14	1485 Demolition	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
15	1490 Replacement Reserve	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
16	1492 Moving to Work Demonstration	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
17	1495.1 Relocation Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
18	1498 Mod Used for Development	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
19	1502 Contingency	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
20	Amount of Annual Statement (Sum of lines 2-19)	\$ 1,927,417.00	\$ 1,927,417.00	\$1,927,417.00	\$ (1,714,463.06)	\$212,953.94	\$1,729,468.01	\$15,004.95	\$197,948.99
21	Amount of line 20 Related to LBP Activities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
22	Amount of line 20 Related to Section 504 Compliance	\$ 40,000.00	\$ -	\$ -	\$ -	\$0.00	\$0.00	\$0.00	\$0.00
23	Amount of line 20 Related to Security	\$40,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
24	Amount of line 20 Related to Energy Conservation	\$285,950.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Housing Authority of the City of Fort Myers, Florida

Line No.	Summary by Development Account	Budget Rev 1	Budget Rev 2	Variance	Description of Adjustments
1	Total Non-CGP Funds				
2	1406 Operations	\$170,000.00	\$170,000.00	\$0.00	
3	1408 Management Improvements	\$214,400.00	\$214,400.00	\$0.00	
4	1410 Administration	\$155,500.00	\$155,500.00	\$0.00	
5	1411 Audit	\$0.00	\$0.00	\$0.00	
6	1415 Liquidated Damages	\$0.00	\$0.00	\$0.00	
7	1430 Fees and Costs	\$42,000.00	\$32,491.97	\$9,508.03	Realign funds to cover expenses in 1460 account
8	1440 Site Acquisition	\$0.00	\$0.00	\$0.00	
9	1450 Site Improvement	\$392,067.00	\$392,067.00	\$0.00	
10	1460 Dwelling Structures	\$674,450.00	\$690,831.00	(\$16,381.00)	Increase funds to cover expenses
11	1465.1 Dwelling Equipment-Nonexpendable	\$90,000.00	\$122,519.00	(\$32,519.00)	Increase funds to cover expenses
12	1470 Nondwelling Structures	\$159,000.00	\$123,582.39	\$35,417.61	Realign funds to cover expenses in 1460, and 1465 accounts
13	1475 Nondwelling Equipment	\$30,000.00	\$26,025.64	\$3,974.36	Realign funds to cover expenses in 1465 account
14	1485 Demolition	\$0.00	\$0.00	\$0.00	
15	1490 Replacement Reserve	\$0.00	\$0.00	\$0.00	
16	1492 Moving to Work Demonstration	\$0.00	\$0.00	\$0.00	
17	1495.1 Relocation Costs	\$0.00	\$0.00	\$0.00	
18	1498 Mod Used for Development	\$0.00	\$0.00	\$0.00	
19	1502 Contingency	\$0.00	\$0.00	\$0.00	
20	Amount of Annual Statement (Sum of lines 2-19)	\$ 1,927,417.00	\$1,927,417.00	\$0.00	

Fort Myers Housing Authority

CFP 2001, FL14P04750101 - PROJECT STATUS

As of 1/16/2003

Dev #	Acct #	Description	Budget Rev 1	Budget Rev 2	Expenses 9/30/02	Balance	Project Status
47-01	1460.1502.01	Bathrooms	\$0.00	\$0.00	\$0.00	\$0.00	Funds realigned to future grant years
47-01	1460.2502.01	Flooring	\$70,000.00	\$67,320.15	(\$67,320.15)	\$0.00	Phase I completed. On-going in CFP2002
		Totals	\$70,000.00	\$67,320.15	(\$67,320.15)	\$0.00	
47-02	1460.1502.02	Roof	\$500.00	\$0.00	\$0.00	\$0.00	Funds realigned to future grant years
47-02	1460.2502.02	Bathroom Renovations	\$0.00	\$0.00	\$0.00	\$0.00	Funds realigned to future grant years
47-02	1460.3502.02	Window Repair	\$0.00	\$0.00	\$0.00	\$0.00	Funds realigned to future grant years
47-02	1460.4502.02	Bldg. Surge Protection	\$1,975.00	\$2,140.24	(\$2,140.24)	\$0.00	completed 9/30/2002
47-02	1460.5502.02	Repair Kitchen Cabinets	\$10,000.00	\$7,613.18	(\$7,613.18)	\$0.00	completed 9/30/2002
47-02	1460.6502.02	Change Locks	\$5,000.00	\$5,460.22	(\$5,460.22)	\$0.00	completed 9/30/2002
47-02	1470.1502.02	ADA/504 Compliance	\$8,000.00	\$8,000.00	(\$558.34)	\$7,441.66	work in progress
		Totals	\$25,475.00	\$23,213.64	(\$15,771.98)	\$7,441.66	
47-03	1460.1502.03	Roof	\$1,500.00	\$0.00	\$0.00	\$0.00	Funds realigned to future grant years
47-03	1460.2502.03	Bathroom Renovations	\$0.00	\$0.00	\$0.00	\$0.00	Funds realigned to future grant years
47-03	1460.3502.03	Flooring (50 Units)	\$75,000.00	\$91,796.70	(\$91,796.70)	\$0.00	Phase I completed. On-going in CFP2002
		Totals	\$76,500.00	\$91,796.70	(\$91,796.70)	\$0.00	
47-04	1460.1502.04	Roof	\$500.00	\$0.00	\$0.00	\$0.00	Funds realigned to future grant years
47-04	1460.2502.04	Window Repair	\$23,000.00	\$23,045.52	(\$23,045.52)	\$0.00	completed 6/30/2002
47-04	1460.3502.04	Bathroom Renovations	\$0.00	\$0.00	\$0.00	\$0.00	Funds realigned to future grant years
47-04	1460.4502.04	Bldg. Surge Protection	\$1,975.00	\$1,975.00	(\$1,975.00)	\$0.00	completed 6/30/2002
47-04	1460.5502.04	Repair Kitchen Cabinets	\$10,000.00	\$902.72	(\$902.72)	\$0.00	completed 9/30/2002
47-04	1460.6502.04	Change Locks	\$5,000.00	\$5,000.00	(\$5,000.00)	\$0.00	completed 6/30/2002
47-04	1460.7502.04	Emergency Water Pump Repair	\$0.00	\$17,639.60	(\$17,639.60)	\$0.00	completed 6/30/2002
47-04	1470.1502.04	ADA/504 Compliance	\$19,000.00	\$19,000.00	(\$12,909.46)	\$6,090.54	work in progress
		Totals	\$59,475.00	\$67,562.84	(\$61,472.30)	\$6,090.54	
47-06	1460.1502.06	Roofs (elderly/family)	\$20,000.00	\$0.00	\$0.00	\$0.00	Funds realigned to future grant years
47-06	1460.2502.06	Bathroom Renovations	\$200,000.00	\$182,271.30	(\$182,271.30)	\$0.00	Phase I completed. On-going in CFP2002
47-06	1460.3502.06	Screen Doors/FMRGA	\$12,000.00	\$8,749.53	(\$8,749.53)	\$0.00	completed 9/30/2002
47-06	1470.1502.06	ADA/504 Compliance	\$37,000.00	\$18.30	(\$18.30)	\$0.00	Funds realigned to 2002 grant
		Totals	\$269,000.00	\$191,039.13	(\$191,039.13)	\$0.00	
PHA Wide	1406.1502.00	Operations	\$170,000.00	\$170,000.00	(\$170,000.00)	\$0.00	completed 6/30/2002
		1406 total	\$170,000.00	\$170,000.00	(\$170,000.00)	\$0.00	
PHA Wide	1408.1502.00	Computer Software/Support	\$73,000.00	\$65,641.24	(\$65,641.24)	\$0.00	completed 9/30/2002, on-going CFP2002
PHA Wide	1408.2502.00	Resident Initiatives	\$50,000.00	\$56,044.18	(\$56,044.18)	\$0.00	completed 9/30/2002, on-going CFP2002
PHA Wide	1408.3502.00	Operational Improvements	\$60,000.00	\$60,657.00	(\$60,657.00)	\$0.00	completed 9/30/2002, on-going CFP2002
PHA Wide	1408.4502.00	Training	\$25,000.00	\$25,457.58	(\$25,457.58)	\$0.00	completed 9/30/2002, on-going CFP2002
PHA Wide	1408.5502.00	HTVN	\$6,400.00	\$6,600.00	(\$6,600.00)	\$0.00	completed 6/30/2002

Fort Myers Housing Authority

CFP 2001, FL14P04750101 - PROJECT STATUS

As of 1/16/2003

		1408 total	\$214,400.00	\$214,400.00	(\$214,400.00)	\$0.00	
PHA Wide	1410.1502.00	Modernization Coordinator	\$59,000.00	\$49,309.89	(\$49,309.89)	\$0.00	completed 9/30/2002, on-going CFP2002
PHA Wide	1410.2502.00	Modernization Assistant	\$52,000.00	\$50,689.05	(\$50,689.05)	\$0.00	completed 9/30/2002, on-going CFP2002
PHA Wide	1410.3502.00	HQS Inspector	\$27,000.00	\$22,005.62	(\$22,005.62)	\$0.00	completed 9/30/2002, on-going CFP2002
PHA Wide	1410.4502.00	Employee Benefits	\$15,000.00	\$30,215.82	(\$30,215.82)	\$0.00	completed 9/30/2002, on-going CFP2002
PHA Wide	1410.5502.00	Mod. Office Supplies	\$2,500.00	\$3,279.62	(\$3,279.62)	\$0.00	completed 9/30/2002, on-going CFP2002
		1410 total	\$155,500.00	\$155,500.00	(\$155,500.00)	\$0.00	
PHA Wide	1430.1502.00	Fees & Costs	\$40,000.00	\$30,491.97	(\$30,538.87)	(\$46.90)	Phase I completed. On-going in CFP2002
PHA Wide	1430.2502.00	Project Costs	\$2,000.00	\$2,000.00	(\$1,953.10)	\$46.90	Phase I completed. On-going in CFP2002
		1430 total	\$42,000.00	\$32,491.97	(\$32,491.97)	\$0.00	
PHA Wide	1450.1501.00	Landscaping	\$213,522.00	\$213,522.00	(\$130,468.30)	\$83,053.70	work in progress
PHA Wide	1450.2502.00	Security/Site Lighting	\$40,000.00	\$40,000.00	(\$29,089.84)	\$10,910.16	work in progress
PHA Wide	1450.3502.00	Recreational Facilities	\$40,000.00	\$40,000.00	(\$33,087.12)	\$6,912.88	work in progress
PHA Wide	1450.4502.00	Site Improvement	\$98,545.00	\$98,545.00	\$0.00	\$98,545.00	work in progress
		1450 total	\$392,067.00	\$392,067.00	(\$192,645.26)	\$199,421.74	
Dev #	Acct #	Description	Budget Amt	Budget Rev 2	Expenses	Balance	
PHA Wide	1460.1502.00	Interior/Exterior Painting	\$150,000.00	\$176,242.09	(\$176,242.09)	\$0.00	Phase I completed. On-going in CFP2002
PHA Wide	1460.2502.00	Prep Units	\$88,000.00	\$100,674.75	(\$100,674.75)	\$0.00	Phase I completed. On-going in CFP2002
		1460 total	\$238,000.00	\$276,916.84	(\$276,916.84)	\$0.00	
PHA Wide	1465.1502.00	Appliances	\$90,000.00	\$122,519.00	(\$122,519.00)	\$0.00	Phase I completed. On-going in CFP2002
		1465 total	\$90,000.00	\$122,519.00	(\$122,519.00)	\$0.00	
PHA Wide	1470.1502.00	Admin Bldg Renovations	\$45,000.00	\$86,933.70	(\$86,933.70)	\$0.00	Phase I completed. On-going in CFP2002
PHA Wide	1470.2502.00	Resident Common Areas	\$50,000.00	\$9,630.39	(\$9,630.39)	\$0.00	Phase I completed. On-going in CFP2002
		1470 total	\$95,000.00	\$96,564.09	(\$96,564.09)	\$0.00	
PHA Wide	1475.1502.00	Computer Equipment	\$30,000.00	\$26,025.64	(\$26,025.64)	\$0.00	Phase I completed. On-going in CFP2002
		1475 total	\$30,000.00	\$26,025.64	(\$26,025.64)	\$0.00	
PHA Wide		Totals	\$1,426,967.00	\$1,486,484.54	(\$1,287,062.80)	\$199,421.74	
CFP 2001	TOTALS		\$1,927,417.00	\$1,927,417.00	(\$1,714,463.06)	\$212,953.94	

Housing Authority of the City of Fort Myers

Capital Fund Grant Number:
FL14P04750102

FFY of Grant Approval: 04/2002

P & E Report - 09/30/02

Line No.	Summary by Development Account	Original Budget	Total Obligated Cost	Total Expended	Budget vs. Expense	Total Draws	Draws Vs. Expense	Draws Vs. Budget
1	Total Non-CGP Funds							
2	1406 Operations	\$75,000.00	\$75,000.00	(\$75,000.00)	\$0.00	\$75,000.00	\$0.00	\$0.00
3	1408 Management Improvements	\$176,600.00	\$22,800.00	(\$18,882.10)	\$157,717.90	\$12,360.97	(\$6,521.13)	\$164,239.03
4	1410 Administration	\$192,000.00	\$20,000.00	(\$17,381.18)	\$174,618.82	\$17,048.49	(\$332.69)	\$174,951.51
5	1411 Audit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	1415 Liquidated Damages	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	1430 Fees and Costs	\$37,000.00	\$5,000.00	(\$1,202.70)	\$35,797.30	\$0.00	(\$1,202.70)	\$37,000.00
8	1440 Site Acquisition	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9	1450 Site Improvement	\$263,584.00	\$3,000.00	(\$2,671.33)	\$260,912.67	\$1,231.53	(\$1,439.80)	\$262,352.47
10	1460 Dwelling Structures	\$820,833.00	\$115,000.00	(\$112,926.22)	\$707,906.78	\$92,324.90	(\$20,601.32)	\$728,508.10
11	1465.1 Dwelling Equipment-Nonexpendable	\$90,000.00	\$15,000.00	(\$14,960.00)	\$75,040.00	\$14,960.00	\$0.00	\$75,040.00
12	1470 Nondwelling Structures	\$126,800.00	\$3,000.00	(\$2,686.48)	\$124,113.52	\$0.00	(\$2,686.48)	\$126,800.00
13	1475 Nondwelling Equipment	\$30,000.00	\$12,000.00	(\$11,728.10)	\$18,271.90	\$10,386.00	(\$1,342.10)	\$19,614.00
14	1485 Demolition	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
15	1490 Replacement Reserve	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
16	1492 Moving to Work Demonstration	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
17	1495.1 Relocation Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
18	1498 Mod Used for Development	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
19	1502 Contingency	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
20	Amount of Annual Statement (Sum of lines 2-19)	\$ 1,811,817.00	\$ 270,800.00	\$ (257,438.11)	\$1,554,378.89	\$223,311.89	(\$34,126.22)	\$1,588,505.11
21	Amount of line 20 Related to LBP Activities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
22	Amount of line 20 Related to Section 504 Compliance	\$51,000.00	\$ -	\$ -	\$0.00	\$0.00	\$0.00	\$0.00
23	Amount of line 20 Related to Security	\$40,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
24	Amount of line 20 Related to Energy Conservation Measures	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Housing Authority of the City of Fort Myers

Project Status as of September 30, 2002

Capitol Fund Program FY 2002

Dev #	Acct #	Description	Budget Amt	Expenses	Balance	Project Status
47-01 Southward Village	1460.1503.01	Flooring	\$50,000.00	(\$6,845.32)	\$43,154.68	Work in Progress.
	1460.2503.01	Roofs	\$3,000.00	\$0.00	\$3,000.00	Not Started
	1460.3503.01	Ceiling Fans	\$10,000.00	\$0.00	\$10,000.00	Not Started
		Totals	\$63,000.00	(\$6,845.32)	\$56,154.68	
47-02 Bonair Towers	1450.1503.02	Entry Canopy	\$3,000.00	\$0.00	\$3,000.00	Received Quotes for approval
	1460.1503.02	Roof	\$500.00	\$0.00	\$500.00	Not Started
	1460.2503.02	Reconnect AC Drains	\$3,000.00	\$0.00	\$3,000.00	Not Started
		Totals	\$6,500.00	\$0.00	\$6,500.00	
47-03 Palmetto Court	1460.1503.03	Flooring	\$50,000.00	(\$6,515.13)	\$43,484.87	Work in Progress.
	1460.2503.03	Roofs	\$1,000.00	\$0.00	\$1,000.00	Not Started
	1460.3503.03	Install Rangehoods	\$35,000.00	(\$11,406.86)	\$23,593.14	Force Account - Work in Progress.
	1460.4503.03	Install GFI's Bathrooms	\$20,000.00	(\$6,630.12)	\$13,369.88	Force Account - Work in Progress.
		Totals	\$106,000.00	(\$24,552.11)	\$81,447.89	
47-04 Royal Palm Towers	1460.1503.04	Roof	\$500.00	\$0.00	\$500.00	Not Started
	1460.2503.04	Repair AC Drains	\$3,000.00	\$0.00	\$3,000.00	Not Started
	1460.3503.04	Repl Bathrm Lavatories	\$7,500.00	\$0.00	\$7,500.00	Not Started
	1460.4503.04	Elevators Modernization	\$135,000.00	\$0.00	\$135,000.00	Process of receiving architect/engineering drawing
	1470.1502.04	ADA/504 Compliance	\$20,000.00	\$0.00	\$20,000.00	Not Started
		Totals	\$166,000.00	\$0.00	\$166,000.00	
47-06 Michigan Family & Flossie Riley Garden Apts	1460.1503.06	Roofs (elderly/family)	\$25,000.00	\$0.00	\$25,000.00	Not Started
	1460.2503.06	Unit Mod/Family (100 units)	\$118,700.00	(\$5,309.70)	\$113,390.30	Force Account - Work in Progress.
	1460.3503.06	Flooring (FMRGA)	\$30,000.00	\$0.00	\$30,000.00	Not Started
	1460.4503.06	Emergency Lights (FMRGA)	\$40,000.00	\$0.00	\$40,000.00	Not Started
	1470.1503.06	ADA/504 Compliance	\$31,000.00	\$0.00	\$31,000.00	Not Started
		Totals	\$244,700.00	(\$5,309.70)	\$239,390.30	
PHA Wide	1406.1502.00	Operations	\$75,000.00	(\$75,000.00)	\$0.00	completed
		1406 total	\$75,000.00	(\$75,000.00)	\$0.00	
PHA Wide	1408.1503.00	Computer Software/Support	\$70,000.00	(\$9,013.46)	\$60,986.54	Work in Progress.
	1408.2503.00	Resident Initiatives	\$50,000.00	(\$6,284.20)	\$43,715.80	Work in Progress.
	1408.3503.00	Operational Improvements	\$35,000.00	\$0.00	\$35,000.00	Not Started
	1408.4503.00	Training	\$15,000.00	(\$3,584.44)	\$11,415.56	Work in Progress.
	1408.5503.00	HTVN	\$6,600.00	\$0.00	\$6,600.00	Not Started
		1408 total	\$176,600.00	(\$18,882.10)	\$157,717.90	
e	1410.1503.00	Modernization Coordinator	\$52,000.00	(\$1,852.02)	\$50,147.98	In Progress.
	1410.2503.00	Modernization Assistant	\$52,000.00	(\$2,596.09)	\$49,403.91	In Progress.
	1410.3503.00	Modernization Office Clerk	\$30,000.00	(\$3,461.52)	\$26,538.48	In Progress.

Housing Authority of the City of Fort Myers

Project Status as of September 30, 2002

Capitol Fund Program FY 2002

	Acct #	Description	Budget Amt	Expenses	Balance	Project Status
PHA Wide	1410.4503.00	HQS Inspector	\$30,000.00	(\$2,772.00)	\$27,228.00	In Progress.
	1410.5503.00	Employee Benefits	\$25,500.00	(\$6,387.34)	\$19,112.66	In Progress.
	1410.6503.00	Mod. Office Supplies	\$2,500.00	(\$312.21)	\$2,187.79	In Progress.
		1410 total	\$192,000.00	(\$17,381.18)	\$174,618.82	
PHA Wide	1430.1503.00	Fees & Costs	\$35,000.00	(\$968.05)	\$34,031.95	Work in Progress.
	1430.2503.00	Project Costs	\$2,000.00	(\$234.65)	\$1,765.35	Work in Progress.
		1430 total	\$37,000.00	(\$1,202.70)	\$35,797.30	
PHA Wide	1450.1503.00	Landscaping	\$120,584.00	(\$365.84)	\$120,218.16	Force Account - Work in Progress.
	1450.2503.00	Security/Site Lighting	\$40,000.00	(\$2,005.53)	\$37,994.47	Force Account - Work in Progress.
	1450.3503.00	Recreational Facilities	\$50,000.00	(\$299.96)	\$49,700.04	Force Account - Work in Progress.
	1450.4503.00	Site Improvement	\$50,000.00	\$0.00	\$50,000.00	Not Started
	1450 total	\$260,584.00	(\$2,671.33)	\$257,912.67		
PHA Wide	1460.1503.00	Interior/Exterior Painting	\$200,633.00	(\$51,187.29)	\$149,445.71	Force Account - Work in Progress.
	1460.2503.00	Prep Units	\$88,000.00	(\$25,031.80)	\$62,968.20	Work in Progress.
		1460 total	\$288,633.00	(\$76,219.09)	\$212,413.91	
Dev #	Acct #	Description	Budget Amt	Expenses	Balance	
PHA Wide	1465.1503.00	Appliances	\$90,000.00	(\$14,960.00)	\$75,040.00	Work in Progress.
		1465 total	\$90,000.00	(\$14,960.00)	\$75,040.00	
PHA Wide	1470.1503.00	Admin Bldg Renovations	\$45,800.00	(\$2,686.48)	\$43,113.52	Force Account - Work in Progress.
	1470.2503.00	Resident Common Areas	\$30,000.00	\$0.00	\$30,000.00	Not Started
		1470 total	\$75,800.00	(\$2,686.48)	\$73,113.52	
PHA Wide	1475.1503.00	Computer Equipment	\$30,000.00	(\$11,728.10)	\$18,271.90	Work in Progress.
		1475 total	\$30,000.00	(\$11,728.10)	\$18,271.90	
PHA Wide		Totals	\$1,225,617.00	(\$220,730.98)	\$1,004,886.02	
CFP 2002 TOTALS			\$1,811,817.00	(\$257,438.11)	\$1,554,378.89	

