

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

PHA Plans

5 Year Plan for Fiscal Years 2000 - 2004

Annual Plan for Fiscal Year 2003

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

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

**PHA Plan
Agency Identification**

PHA Name: HOUSING AUTHORITY OF JACKSON COUNTY

PHA Number: OR015

PHA Fiscal Year Beginning: (mm/yyyy) 01/2003

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)

TO PROVIDE, DEVELOP AND PRESERVE DECENT, SAFE AND AFFORDABLE HOUSING TO FAMILIES AND INDIVIDUALS WHILE COORDINATING EFFORTS TOWARD SELF-SUFFICIENCY.

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)

Application is pending for an additional 56 Fairshare Vouchers, 75 Mainstream Vouchers and 70 Reallocation Vouchers. The Authority has been awarded 20 Rural Development units for migrant farmworkers. The Pre-Application for 20 additional

units of housing for permanent farmworkers has been approved and the Final Application is being prepared. The Authority has submitted an application to the State of Oregon for Low Income Housing Tax Credit funding for 42 units of affordable housing. The Authority is looking for land for the next affordable housing project.

- 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)

The Authority is a high performer under the Management Assessment Indicator. Year 2000 MASS score was 29. SEMAP score is 93.

- 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)
- Investigate the implementation of homeownership and voluntary conversion.**

In the past year Housing Authority has provided voucher mobility counseling, conducted efforts to potential voucher landlords and increased the voucher payment standards.

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)
 YOUTH ACTIVITIES FOR DRUG PREVENTION
 EDUCATIONAL OPPORTUNITIES

The Authority sponsored a daily summer lunch program at all of the multifamily sites including public housing. PHDEP funds were used to support a summer program for youth involved in film making, for YMCA programs, music lessons and other activities that enriched the lives of children. The elimination of the PHDEP program will curtail these programs.

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)

In the past year the Agency is continuing to assist families in the Family Self Sufficiency Program with employability issues.

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)

Housing Authority is providing assistance to any potential landlords to make units suitable for tenants with disabilities.

Other PHA Goals and Objectives: (list below)

Annual PHA Plan
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 Jackson County, in the next year, intends to manage existing programs effectively. The agency will pursue opportunities that might arise to increase the availability of affordable housing. The Authority has instituted a series of quarterly meetings with local law enforcement agencies as a result of the TA grant from HUD. Staff will continue to work with residents to establish a resident organization.

The Authority will continue the policy of screening tenants more extensively than required by regulation. We have increased the payment standard to a higher percentage of the FMRs to more accurately reflect market conditions and assist tenants in being able to find suitable units. This also makes it easier to meet the 40% limit on the tenants contributions. The agency has instituted a \$50 minimum rent. Flat rents have been established for all Public Housing units. Interim recertifications are not required if the family has an increase in income.

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.

NA

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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
- FY 2003 Capital Fund Program Annual Statement - **(OR015a01)**
- Most recent board-approved operating budget

OTHER: THE PROGRESS REPORT ON THE 5 – YEAR PLAN IS A STATEMENT UNDER EACH GOAL ON THE PLAN. (SEE ABOVE)

Optional Attachments:

- PHA Management Organizational Chart
- FY 2003 Capital Fund Program 5 Year Action Plan – **(OR015a01)**
- Public Housing Drug Elimination Program (PHDEP) Plan)
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- Resident Membership of the PHA Governing Board –At the end of document – **attachment b**
- X **ATTACHMENT c**– Membership of the Resident Advisory Board – At the end of document.

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 |
| √ | PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations | 5 Year and Annual Plans |
| √ | State/Local Government Certification of Consistency with the Consolidated Plan | 5 Year and Annual Plans |
| √ | Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement. | 5 Year and Annual Plans |
| √ | Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction | Annual Plan: Housing Needs |
| √ | Most recent board-approved operating budget for the public housing program | Annual Plan: Financial Resources; |
| √ | Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP] | Annual Plan: Eligibility, Selection, and Admissions Policies |
| √ | Section 8 Administrative Plan | Annual Plan: Eligibility, Selection, and Admissions Policies |
| √ | Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis | Annual Plan: Eligibility, Selection, and Admissions Policies |
| √ | 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 |
| √ | Schedule of flat rents offered at each public housing development | Annual Plan: Rent Determination |

| List of Supporting Documents Available for Review | | |
|----------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|
| Applicable & On Display | Supporting Document | Applicable Plan Component |
| | <input type="checkbox"/> check here if included in the public housing A & O Policy | |
| √ | Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan | Annual Plan: Rent Determination |
| | Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation) | Annual Plan: Operations and Maintenance |
| √ | Public housing grievance procedures <input 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 checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan | Annual Plan: Grievance Procedures |
| √ | The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year | Annual Plan: Capital Needs |
| | Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant | Annual Plan: Capital Needs |
| √ | Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option) | Annual Plan: Capital Needs |
| | Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing | Annual Plan: Capital Needs |
| | Approved or submitted applications for demolition and/or disposition of public housing | Annual Plan: Demolition and Disposition |
| | Approved or submitted applications for designation of public housing (Designated Housing Plans) | Annual Plan: Designation of Public Housing |
| | Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act | Annual Plan: Conversion of Public Housing |
| | Approved or submitted public housing homeownership programs/plans | Annual Plan: Homeownership |
| | Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan | Annual Plan: Homeownership |
| | Any cooperative agreement between the PHA and the TANF agency | Annual Plan: Community Service & Self-Sufficiency |
| √ | FSS Action Plan/s for public housing and/or Section 8 | Annual Plan: Community Service & Self-Sufficiency |
| | Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports | Annual Plan: Community Service & Self-Sufficiency |
| √ | The most recent Public Housing Drug Elimination Program (PHEDEP) semi-annual performance report for any open grant | Annual Plan: Safety and Crime Prevention |

| List of Supporting Documents Available for Review | | |
|----------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|
| Applicable & On Display | Supporting Document | Applicable Plan Component |
| | and most recently submitted PHDEP application (PHDEP Plan) | |
| √ | 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 |
| √ | Community Service Requirement | |
| √ | HA Pet Policy | |

1. Statement of Housing Needs

[24 CFR Part 903.79 (a)]

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

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

| Housing Needs of Families in the Jurisdiction by Family Type | | | | | | | |
|-------------------------------------------------------------------------|----------------|----------------------|---------------|----------------|----------------------|-------------|-----------------|
| Family Type | Overall | Affordability | Supply | Quality | Accessibility | Size | Location |
| Income <= 30% of AMI | 4838 | 5 | 5 | 3 | 1 | 4 | 5 |
| Income >30% but <=50% of AMI | 4072 | 5 | 5 | 3 | 1 | 4 | 4 |
| Income >50% but <80% of AMI | 5570 | 3 | 4 | 2 | 1 | 3 | 3 |
| Elderly | 4754 | 4 | 5 | 4 | 4 | 3 | 3 |
| Families with Disabilities | Unkown | 5 | 5 | 4 | 5 | 3 | 5 |
| HISPANIC | 638 | 4 | 4 | 4 | 1 | 4 | 4 |
| BLACK | 24 | 3 | 3 | 3 | 1 | 3 | 3 |
| NATIVE AMERICAN | Unkown | | | | | | |

| Housing Needs of Families in the Jurisdiction by Family Type | | | | | | | |
|-----------------------------------------------------------------|---------|---------------|--------|---------|---------------|------|----------|
| Family Type | Overall | Affordability | Supply | Quality | Accessibility | Size | Location |
| ASIAN & PACIFIC ISLANDER | Unknown | | | | | | |

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: 1995
- U.S. Census data: the Comprehensive Housing Affordability Strategy (“CHAS”) dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)

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

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

| Housing Needs of Families on the Waiting List | | | |
|------------------------------------------------------|-------------------------------------------------------------------------|---------------------|-----------------|
| Waiting list type: (select one) | | | |
| <input checked="" type="checkbox"/> | Section 8 tenant-based assistance | | |
| <input type="checkbox"/> | Public Housing | | |
| <input type="checkbox"/> | Combined Section 8 and Public Housing | | |
| <input type="checkbox"/> | Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 2812 | | 144 |

| Housing Needs of Families on the Waiting List | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|------|--|
| Extremely low income <=30% AMI | 1996 | 70% | |
| Very low income (>30% but <=50% AMI) | 768 | 27% | |
| Low income (>50% but <80% AMI) | 91 | 3% | |
| Families with children | 1012 | 36% | |
| Elderly families | 258 | 9% | |
| Families with Disabilities | 587 | 21% | |
| HISPANIC | 149 | 5% | |
| BLACK | 44 | 1.5% | |
| AMERICAN INDIAN | 32 | 1.1% | |
| ASIAN | 6 | .2% | |
| Characteristics by Bedroom Size (Public Housing Only) | | | |
| 1BR | 1279 | 45% | |
| 2 BR | 1085 | 38% | |
| 3 BR | 436 | 15% | |
| 4 BR | 51 | 2% | |
| 5 BR | 7 | .2 % | |
| 5+ BR | | | |
| 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 | | | |

| |
|------------------------------------------------------|
| Housing Needs of Families on the Waiting List |
|------------------------------------------------------|

Housing Needs of Families on the Waiting List

Waiting list type: (select one)

- Section 8 tenant-based assistance
 Public Housing
 Combined Section 8 and Public Housing
 Public Housing Site-Based or sub-jurisdictional waiting list (optional)

If used, identify which development/subjurisdiction:

| | # of families | % of total families | Annual Turnover |
|-------------------------------------------------------------|---------------|---------------------|-----------------|
| Waiting list total | 2331 | | 32 |
| Extremely low income <=30% AMI | 1634 | 70% | |
| Very low income (>30% but <=50% AMI) | 594 | 26% | |
| Low income (>50% but <80% AMI) | 101 | 4% | |
| Families with children | 771 | 33% | |
| Elderly families | 224 | 9.6% | |
| Families with Disabilities | 499 | 21% | |
| HISPANIC | 113 | 4.8% | |
| BLACK | 41 | 1.8% | |
| AMERICAN INDIAN | 23 | 1% | |
| ASIAN | 7 | .3% | |
| Characteristics by Bedroom Size (Public Housing Only) | | | |
| 1BR | 1213 | 52% | |
| 2 BR | 910 | 39% | |
| 3 BR | 179 | 8% | |
| 4 BR | 29 | 1% | |
| 5 BR | 0 | 0% | |
| 5+ BR | 0 | 0% | |

Housing Needs of Families on the Waiting List

Is the waiting list closed (select one)? No Yes

If yes:

How long has it been closed (# of months)?

Does the PHA expect to reopen the list in the PHA Plan year? No Yes

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

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 903.79 (b)]

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

| Financial Resources: Planned Sources and Uses | | |
|---------------------------------------------------------------------------------------|-------------------|---------------------|
| Sources | Planned \$ | Planned Uses |
| 1. Federal Grants (FY 2003 grants) | | |
| a) Public Housing Operating Fund | \$253,250 | |
| b) Public Housing Capital Fund | \$282,359 | |
| c) HOPE VI Revitalization | \$0 | |
| d) HOPE VI Demolition | \$0 | |
| e) Annual Contributions for Section 8 Tenant-Based Assistance | \$8,000,000 | |
| f) Public Housing Drug Elimination Program (including any Technical Assistance funds) | \$0 | |
| g) Resident Opportunity and Self-Sufficiency Grants | \$0 | |
| h) Community Development Block Grant | \$0 | |
| i) HOME | \$0 | |
| Other Federal Grants (list below) | | |
| | | |

| Financial Resources: Planned Sources and Uses | | |
|-------------------------------------------------------------------------------|-----------------------|-------------------------------------------|
| Sources | Planned \$ | Planned Uses |
| 2. Prior Year Federal Grants (unobligated funds only) (list below) | | |
| FY 2001 PUBLIC HOUSING CAPITAL FUND | \$202,865 | CAPITAL IMPROVEMENTS AND OPERATIONS |
| FY 2002 PUBLIC HOUSING CAPITAL FUND | \$282,359 | |
| FY 2001 PUBLIC HOUSING DRUG ELIMINATION PROGRAM | \$24,519.75 | DRUG ELIMINATION AND PREVENTION |
| 3. Public Housing Dwelling Rental Income | | |
| | \$332,000 | PH OPERATIONS |
| | | |
| 4. Other income (list below) | | |
| INTEREST | \$2,300 | PH OPERATIONS |
| TENANT CHARGES | \$46,000 | PH OPERATIONS |
| 4. Non-federal sources (list below) | | |
| | | |
| | | |
| | | |
| Total resources | \$9,425,652.75 | |

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)
- ONE MONTH
- Other: (describe)

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

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

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

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

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

(2)Waiting List Organization

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

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

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

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

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

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

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

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

4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?

- PHA main administrative office
- All PHA development management offices
- Management offices at developments with site-based waiting lists
- At the development to which they would like to apply
- Other (list below)

(3) Assignment

a. How many vacant unit choices are applicants ordinarily given before they fall to the bottom of or are removed from the waiting list? (select one)

- One
- Two
- Three or More

b. Yes No: Is this policy consistent across all waiting list types?

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

(4) Admissions Preferences

a. Income targeting:

- Yes No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?

b. Transfer policies:

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

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

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

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

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

1 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- 2 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)

Component 3, (6) Deconcentration and Income Mixing

- a. Yes No: Does the PHA have any general occupancy (family) public housing developments covered by the deconcentration rule? If no, this section is complete. If yes, continue to the next question.
- b. Yes No: Do any of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments? If no, this section is complete.

If yes, list these developments as follows:

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

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)

Rental History with the Housing Authority of Jackson County. All information from the file is available.

(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:

1. Tenant proof they have been diligently looking for a unit or that they were unable to look for a unit because of unusual circumstances.
2. Portability Vouchers

(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)

1. Families inappropriately housed in various Housing Authority programs may be given a voucher to correct the situation, for example, in an inappropriate geographic location. This would be an administrative decision.
2. Persons involuntarily displaced and eligible for relocation benefits as the result of government action or the result of action by a nonprofit agency or government agency in the development of affordable housing.

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

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)
- 2** Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- 3** Other preference(s) (list below)
 - 1. Families inappropriately housed in Housing Authority programs.
 - 2. Persons involuntarily displaced by government or nonprofit action.

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)
 1. When family composition changes.
 2. Changes in income to a zero income family.

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)

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:

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 | Expected Turnover |
|---------------------|-----------------------------------------|--------------------------|
|---------------------|-----------------------------------------|--------------------------|

| | Beginning | |
|---------------------------------------------------------------------|------------------|--|
| Public Housing | | |
| Section 8 Vouchers | | |
| Section 8 Certificates | | |
| Section 8 Mod Rehab | | |
| Special Purpose Section 8 Certificates/Vouchers (list individually) | | |
| Public Housing Drug Elimination Program (PHDEP) | | |
| | | |
| Other Federal Programs(list individually) | | |
| | | |
| | | |

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)
- (2) Section 8 Management: (list below)

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

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

A. Public Housing

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

If yes, list additions to federal requirements below:

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

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

B. Section 8 Tenant-Based Assistance

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

If yes, list additions to federal requirements below:

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

- PHA main administrative office
 Other (list below)

7. Capital Improvement Needs

[24 CFR Part 903.79 (g)]

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

A. Capital Fund Activities

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

(1) Capital Fund Program Annual Statement

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

Select one:

- The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name) OR015a01

-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 OR015a01
- 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: |
| 1b. Development (project) number: |
| 2. Designation type: Occupancy by only the elderly <input type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/> |
| 3. Application status (select one) |

| |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Approved; included in the PHA's Designation Plan <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/> |
| 4. Date this designation approved, submitted, or planned for submission: (DD/MM/YY) |
| 5. If approved, will this designation constitute a (select one) <input type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan? |
| 6. Number of units affected: 7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development |

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 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

- a. How many of the PHA's developments are subject to the Required Initial Assessments?
ALL OF THE DEVELOPMENTS THE AUTHORITY OWNS ARE SUBJECT TO THE REQUIRED INITIAL ASSESSMENTS (EIGHT DEVELOPMENTS).
- 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 developments not general occupancy projects)? **ZERO, ALL ARE GENERAL OCCUPANCY PROJECTS.**
- c. How many Assessments were conducted for the PHA's covered developments?
The Authority is in the process of conducting detailed assessments for all eight developments.
- d. Identify PHA developments that may be appropriate for conversion based on the required Initial Assessments: **The Authority is not at a point of making this determination.**

e. If the PHA has not completed the Required Initial Assessments, describe the status of these assessments: **The Housing Authority is in the process of assessing the feasibility of converting its single family housing stock to newer, more efficient housing. The Authority is completing a detailed financial analysis of the costs of operating the Public Housing Program verses converting the units to Housing Choice vouchers. The Authority is investigating the possibility of using a Section 18 Disposition Action. The proceeds from the sale of the single-family homes would be used to build new affordable housing, leveraging additional funds in certain cases. The Authority has contacted HUD Director of Special Applications, Ainars Rodins, but has not received a reply. We are in the early stages of this analysis.**

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

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

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

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

2. Activity Description

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

**Public Housing Homeownership Activity Description
(Complete one for each development affected)**

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

B. Section 8 Tenant Based Assistance

1. Yes No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982 ? (If "No", skip to component 12; if "yes", describe each program using the table below (copy and complete questions for each program identified), unless the PHA is eligible to complete a streamlined submission due to high performer status. **High performing PHAs** may skip to component 12.)

2. Program Description:

a. Size of Program

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

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

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

b. PHA-established eligibility criteria

- Yes No: Will the PHA's program have eligibility criteria for participation in its Section 8 Homeownership Option program in addition to HUD criteria? If yes, list criteria below:

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (l)]

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

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

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

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

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

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

B. Services and programs offered to residents and participants

(1) General

a. Self-Sufficiency Policies

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

(select all that apply)

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

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 |
|----------------------------------------------------------------------------------------------------------------|

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.79 (m)]

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

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

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

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

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

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

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

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)

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)

D. Additional information as required by PHDEP/PHDEP Plan

PHAs eligible for FY 2003 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

- Yes No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes No: Has the PHA included the PHDEP Plan for FY 2003 in this PHA Plan?
- Yes No: This PHDEP Plan is an Attachment. (Attachment Filename)

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

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 903.79 (r)]

A. Resident Advisory Board Recommendations

1. Yes No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
- Attached at Attachment (File name)
- Provided below:
3. In what manner did the PHA address those comments? (select all that apply)
- Considered comments, but determined that no changes to the PHA Plan were necessary.
- The PHA changed portions of the PHA Plan in response to comments
List changes below:
- Other: (list below)

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

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

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

3. Description of Resident Election Process

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

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

b. Eligible candidates: (select one)

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

c. Eligible voters: (select all that apply)

- All adult recipients of PHA assistance (public housing and section 8 tenant-based assistance)
 Representatives of all PHA resident and assisted family organizations
 Other (list) **Interested residents submit applications to the County Commissioners who make the selection.**

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: CITY OF MEDFORD, OREGON

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)
APPLY FOR ANY ADDITIONAL VOUCHERS IF AVAILABLE.
APPLY FOR FUNDING FROM SOURCES OTHER THAN HUD TO
DEVELOP MORE AFFORDABLE HOUSING
MAINTAIN EXISTING AFFORDABLE HOUSING
- Other: (list below)

4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)
1. INCREASE AFFORDABLE RENTAL HOUSING FOR LOW, VERY LOW, AND EXTREMELY LOW INCOME HOUSEHOLDS
 2. PROVIDE SUPPORTIVE HOUSING FOR THE ELDERLY AND OTHER SPECIAL NEEDS POPULATIONS

1. Consolidated Plan jurisdiction: STATE OF OREGON

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)
APPLY FOR ANY ADDITIONAL VOUCHERS IF AVAILABLE.
APPLY FOR FUNDING FROM SOURCES OTHER THAN HUD TO
DEVELOP MORE AFFORDABLE HOUSING
MAINTAIN EXISTING AFFORDABLE HOUSING
- Other: (list below)

4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)
- INCREASE THE SUPPLY OF SAFE, DECENT, AFFORDABLE RENTAL HOUSING FOR LOW AND VERY LOW INCOME OREGONIANS

1. Consolidated Plan jurisdiction: CITY OF ASHLAND, OREGON

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)
 APPLY FOR ANY ADDITIONAL VOUCHERS IF AVAILABLE.
 APPLY FOR FUNDING FROM SOURCES OTHER THAN HUD TO
 DEVELOP MORE AFFORDABLE HOUSING
 MAINTAIN EXISTING AFFORDABLE HOUSING
- Other: (list below)

4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)
 INCREASE AFFORDABLE RENTAL HOUSING AVAILABILITY FOR LOW INCOME HOUSEHOLDS

D. Other Information Required by HUD

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

- 903.7(r)(2) A PHA must identify the basic criteria the PHA will use for determining:**
- (i) A substantial deviation from its 5-Year Plan; and
 - (ii) A significant amendment or modification to its 5- Year Plan and Annual Plan.

A significant amendment, modification or substantial deviation to the 5-Year Plan and the Annual Plan is defined as:

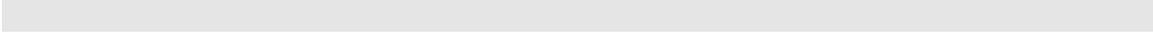
- 1. Changes to rent or admissions policies or organization of the waiting list.**
- 2. Additions of non-emergency work items (items not included in the current Annual Statement or Five-Year Action Plan) or change in the use of replacement reserve funds under the Capital Fund.**
- 3. Any change with regard to demolition or disposition, designation, homeownership programs or conversion activities.**

4. ATTACHMENT b: RESIDENT MEMBERSHIP OF THE PHA GOVERNING BOARD

Kelley Meyers is the resident member of the Housing Authority Board of Commissioners. She is an assisted tenant in the Section 8 program. The tenant board member is appointed by the Jackson County Commissioners. The term is for five years. The Authority sends out information to tenants concerning a position to be filled. Tenants turn in applications to the County Commissioners.

ATTACHMENT c: MEMBERSHIP OF THE RESIDENT ADVISORY BOARD

The Housing Authority of Jackson County did not have a Resident group in place to act as the Advisory Board for the Agency Plan. The Agency decided to name the members of the Family Self Sufficiency Programs in both the Public Housing and the Section 8 programs as members of the Advisory group. Letters were sent to the participants inviting them to participate in the process of determining the policies in the Plan.



CAPITAL FUND PROGRAM TABLES START HERE
Housing Authority of Jackson County OR015
Attachment OR015a01

| Annual Statement/Performance and Evaluation Report | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|-------------------------------------------------------------------------------------------------|---------|------------------------------|----------|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary | | | | | |
| PHA Name: Housing Authority of Jackson County | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | Federal FY of Grant: 2003 | |
| <input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report | | | | | |
| Line No. | Summary by Development Account | Total Estimated Cost | | Total Actual Cost | |
| | | Original | Revised | Obligated | Expended |
| 1 | Total non-CFP Funds | | | | |
| 2 | 1406 Operations | 18,000 | | | |
| 3 | 1408 Management Improvements | 39,000 | | | |
| 4 | 1410 Administration | 28,235 | | | |
| 5 | 1411 Audit | | | | |
| 6 | 1415 Liquidated Damages | | | | |
| 7 | 1430 Fees and Costs | | | | |
| 8 | 1440 Site Acquisition | | | | |
| 9 | 1450 Site Improvement | | | | |
| 10 | 1460 Dwelling Structures | 147,124 | | | |
| 11 | 1465.1 Dwelling Equipment—Nonexpendable | | | | |
| 12 | 1470 Nondwelling Structures | | | | |
| 13 | 1475 Nondwelling Equipment | 50,000 | | | |
| 14 | 1485 Demolition | | | | |
| 15 | 1490 Replacement Reserve | | | | |
| 16 | 1492 Moving to Work Demonstration | | | | |
| 17 | 1495.1 Relocation Costs | | | | |
| 18 | 1499 Development Activities | | | | |
| 19 | 1501 Collateralization or Debt Service | | | | |
| 20 | 1502 Contingency | | | | |
| 21 | Amount of Annual Grant: (sum of lines 2 – 20) | 282,359 | | | |
| 22 | Amount of line 21 Related to LBP Activities | 0 | | | |
| 23 | Amount of line 21 Related to Section 504 compliance | 0 | | | |
| 24 | Amount of line 21 Related to Security – Soft Costs | 0 | | | |
| 25 | Amount of Line 21 Related to Security – Hard Costs | 0 | | | |
| 26 | Amount of line 21 Related to Energy Conservation Measures | 36,400 | | | |

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

Part II: Supporting Pages

| PHA Name: Housing Authority of Jackson County | | Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2003 | | | |
|--------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|----------------------|------------------------------|--------------------|-------------------|-------------------|
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work |
| | | | | Original | Revised | Funds Obligated | Funds Expended | |
| HA-Wide | Operations | 1406 | | 18,000 | | | | |
| HA-Wide | Management Improvements – Soft Costs: (1) Phone System Software (2)Market Study for Disposition. Hard Costs: Phone System | 1408 | Phone system \$32,000 Market Study \$7,000 | 39,000 | | | | |
| HA-Wide | Administration | 1410 | | 28,235 | | | | |
| Project 02 | One major system replaced – furnace, floorcoverings or roof | 1460 | (1) unit | 3,800 | | | | |
| Project 03 | One major system replaced – furnace, floorcoverings or roof | 1460 | (1) unit | 3,800 | | | | |
| Project 04 | Furnaces replaced (\$1,300 each) Air Conditioning added (\$1,800 each) Dishwashers and Garbage Disposals (\$700 each) | 1460 | (28) furnaces (12) air conditioners (10) dishwashers &garbage disposals | 65,124 | | | | |
| Project 05 | One major system replaced – furnace, floorcoverings or roof | 1460 | (1) unit | 3,800 | | | | |
| Project 06 | One major system replaced – furnace, floorcoverings or roof | 1460 | (1) unit | 3,800 | | | | |
| Project 09 | One major system replaced – furnace, floorcoverings or roof | 1460 | (1) unit | 3,800 | | | | |
| Project 11 | Air Conditioning added (\$1,800 each) | 1460 | (4) units | 7,200 | | | | |
| Project 13 | Air Conditioning added (\$1,800 each) | 1460 | (31) units | 55,800 | | | | |
| Non Dwelling Equipment | Two vehicles (\$22,000 each) and two work stations (\$3,000 each) | 1475 | (2) vehicles, (2) work stations | 50,000 | | | | |

Capital Fund Program Five-Year Action Plan Part I: Summary

| PHA Name Housing Authority of Jackson County | | | | | | <input type="checkbox"/> Original 5-Year Plan <input checked="" type="checkbox"/> Revision No: 1 |
|-----------------------------------------------------|------------------|---------------------------------------------------------|---------------------------------------------------------|---------------------------------------------------------|---------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| Development Number/Name/HA-Wide | Year 1 | Work Statement for Year 2 FFY Grant: PHA FY: 2004 | Work Statement for Year 3 FFY Grant: PHA FY: 2005 | Work Statement for Year 4 FFY Grant: PHA FY: 2006 | Work Statement for Year 5 FFY Grant: PHA FY: 2007 | |
| | Annual Statement | | | | | |
| Project 02 | | 3,800 | 3,800 | 27,800 | 37,724 | |
| Project 03 | | 3,800 | 3,800 | 36,800 | 50,600 | |
| Project 04 | | 79,676 | 0 | 36,000 | 0 | |
| Project 05 | | 3,800 | 3,800 | 18,800 | 34,600 | |
| Project 06 | | 3,800 | 3,800 | 20,577 | 53,600 | |
| Project 09 | | 3,800 | 3,800 | 9,800 | 48,600 | |
| Project 11 | | 2,800 | 12,000 | 8,000 | 0 | |
| Project 13 | | 59,700 | 194,124 | 15,876 | 0 | |
| HA – WIDE | | 121,183 | 57,235 | 108,706 | 57,235 | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| CFP Funds Listed for 5-year planning | | | | | | |
| | | | | | | |
| Replacement Housing Factor Funds | | | | | | |

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

| Activities for Year 1 | Activities for Year :__2_ FFY Grant: 2004 PHA FY: 2004 | | | Activities for Year: __3_ FFY Grant: 2005 PHA FY: 2005 | | |
|-----------------------|--------------------------------------------------------------|-------------------------------------------------------------|----------------|--------------------------------------------------------------|-------------------------------------------------------------|----------------|
| | Development Name/Number | Major Work Categories | Estimated Cost | Development Name/Number | Major Work Categories | Estimated Cost |
| See Annual Plan | Project 02 | One major system replaced – furnace, floorcoverings or roof | 3,800 | Project 02 | One major system replaced – furnace, floorcoverings or roof | 3,800 |
| | Subtotal | | 3,800 | | | 3,800 |
| | Project 03 | One major system replaced – furnace, floorcoverings or roof | 3,800 | Project 03 | One major system replaced – furnace, floorcoverings or roof | 3,800 |
| | Subtotal | | 3,800 | | | 3,800 |
| | Project 04 | New Appliances, refrigerators, ranges & hoods (28 units) | 25,200 | Project 04 | | 0 |
| | | New Floorcoverings (14 units) | 42,000 | | | |
| | | Dishwashers & Garbage Disposals (18 units) | 12,476 | | | |
| | Subtotal | | 79,676 | | | 0 |
| | Project 05 | One major system replaced – furnace, floorcoverings or roof | 3,800 | Project 05 | One major system replaced – furnace, floorcoverings or roof | 3,800 |
| | Subtotal | | 3,800 | | | 3,800 |
| | Project 06 | One major system replaced – furnace, floorcoverings or roof | 3,800 | Project 06 | One major system replaced – furnace, floorcoverings or roof | 3,800 |
| | Subtotal | | 3,800 | | | 3,800 |
| | Project 09 | One major system replaced – furnace, floorcoverings or roof | 3,800 | Project 09 | One major system replaced – furnace, floorcoverings or roof | 3,800 |
| | Subtotal | | 3,800 | | | 3,800 |

| Activities for Year 1 | Activities for Year :__2_ FFY Grant: 2004 PHA FY: 2004 | | | Activities for Year: __3_ FFY Grant: 2005 PHA FY: 2005 | | |
|-----------------------------|--------------------------------------------------------------|---------------------------------------------------------|-------------------|--------------------------------------------------------------|----------------------------------------------------|-------------------|
| | Development Name/Number | Major Work Categories | Estimated Cost | Development Name/Number | Major Work Categories | Estimated Cost |
| | Project 11 | Dishwashers & Garbage Disposals (4) | 2,800 | Project 11 | New floorcoverings (4) | 12,000 |
| | Subtotal | | 2,800 | | | 12,000 |
| | Project 13 | Dishwashers & Garbage Disposals (31) | 21,700 | Project 13 | Remodel to add Interior & Exterior Storage (25) | 75,000 |
| | | Remodel to add Interior & Exterior Storage (6) | 18,000 | | New Floorcoverings (24) | 73,000 |
| | | New Floorcoverings (7) | 20,000 | | Carports (31) | 31,000 |
| | | | | | Landscaping (15) | 15,124 |
| | Subtotal | | 59,700 | | | 194,124 |
| | HA - Wide | Operations -1406 | 18,000 | HA -WIDE | Operations | 18,000 |
| | | Administration - 1410 | 28,235 | | Administration | 28,235 |
| | 1408 | Management Imp. – Projection System | 7500 | | Software Upgrades | 5,000 |
| | 1408 | Software Upgrades | 5000 | | | |
| | 1475 | Non-dwelling equipment – two replacement vehicles | 44,000 | | Two new workstations | 6,000 |
| | 1475 | Office Furniture – Conference Room | 12,448 | | | |
| | 1475 | Two new workstations | 6,000 | | | |
| | Subtotal | | 121,183 | | | 57,235 |
| | Total CFP Estimated Cost | | \$ 282,359 | | | \$ 282,359 |

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

| Activities for Year : ___4_ FFY Grant: 2006 PHA FY: 2006 | | | Activities for Year: _5_ FFY Grant: 2007 PHA FY: 2007 | | |
|----------------------------------------------------------------|-------------------------------------------------------------|-----------------------|-------------------------------------------------------------|-------------------------------------------------------------|-----------------------|
| Development Name/Number | Major Work Categories | Estimated Cost | Development Name/Number | Major Work Categories | Estimated Cost |
| Project 02 | One major system replaced – furnace, floorcoverings or roof | 3,800 | Project 02 | One major system replaced – furnace, floorcoverings or roof | 3,800 |
| 1460 | Windows | 18,000 | | Windows | 3,000 |
| | | | | New Roof and Gutters | 3,800 |
| | | | | Kitchen & Bath Remodel | 10,000 |
| | | | | Exterior Paint (2) | 6,000 |
| | | | | Floorcoverings (3) | 11,124 |
| 1450 | Landscaping and Concrete | 6,000 | | | |
| Subtotal | | 27,800 | | | 37,724 |
| Project 03 | One major system replaced – furnace, floorcoverings or roof | 3,800 | Project 03 | One major system replaced – furnace, floorcoverings or roof | 3,800 |
| 1460 | Windows | 3000 | | Windows | 9,000 |
| | | | | New Roof and Gutters | 3,800 |
| | | | | Kitchen & Bath Remodel (2) | 20,000 |
| | | | | Exterior Paint (2) | 6,000 |
| | | | | Floorcoverings (2) | 8,000 |
| 1450 | Landscaping and Concrete | 30,000 | | | |
| Subtotal | | 36,800 | | | 50,600 |
| Project 04 | Landscaping (6 sites) | 28,000 | Project 04 | | 0 |
| 1450 | Carports (8) | 8,000 | | | |
| Subtotal | | 36,000 | | | 0 |
| Project 05 | One major system replaced – furnace, floorcoverings or roof | 3,800 | Project 05 | One major system replaced – furnace, floorcoverings or roof | 3,800 |
| 1460 | Windows | 3,000 | | Windows | 3,000 |
| | | | | New Roof and Gutters | 3,800 |

Activities for Year : 4
 FFY Grant: 2006
 PHA FY: 2006

Activities for Year: 5
 FFY Grant: 2007
 PHA FY: 2007

| Development Name/Number | Major Work Categories | Estimated Cost | Development Name/Number | Major Work Categories | Estimated Cost |
|-------------------------|-------------------------------------------------------------|----------------|-------------------------|-------------------------------------------------------------|----------------|
| Project 05 (cont.) | | | Project 05 (cont.) | | |
| | | | | Kitchen & Bath Remodel | 10,000 |
| | | | | Exterior Paint (2) | 6,000 |
| | | | | New Floorcoverings(2) | 8,000 |
| 1450 | Landscaping | 12,000 | | | |
| Subtotal | | 18,800 | | | 34,600 |
| Project 06 | One major system replaced – furnace, floorcoverings or roof | 3,800 | Project 06 | One major system replaced – furnace, floorcoverings or roof | 3,800 |
| 1460 | Windows | 4,777 | | Windows | 12,000 |
| | | | | New Roof and Gutters | 3,800 |
| | | | | Kitchen & Bath Remodel (2) | 20,000 |
| | | | | Exterior Paint (2) | 6,000 |
| | | | | New Floorcoverings(2) | 8,000 |
| 1450 | Landscaping | 12,000 | | | |
| Subtotal | | 20,577 | | | 53,600 |
| Project 09 | One major system replaced – furnace, floorcoverings or roof | 3,800 | Project 09 | One major system replaced – furnace, floorcoverings or roof | 3,800 |
| 1460 | Windows | 6,000 | | Windows | 3,000 |
| | | | | New Roof and Gutters | 3,800 |
| | | | | Kitchen & Bath Remodel (2) | 20,000 |
| | | | | Exterior Paint (2) | 6,000 |
| | | | | New Floorcoverings(3) | 12,000 |
| Subtotal | | 9,800 | | | 48,600 |
| Project 11 | Landscaping | 4,000 | Project 11 | | 0 |
| 1450 | Carports (4) | 4,000 | | | |
| Subtotal | | 8,000 | | | 0 |
| | | | | | |
| | | | | | |
| | | | | | |

Activities for Year : 4
 FFY Grant: 2006
 PHA FY: 2006

Activities for Year: 5
 FFY Grant: 2007
 PHA FY: 2007

| Development Name/Number | Major Work Categories | Estimated Cost | Development Name/Number | Major Work Categories | Estimated Cost |
|---------------------------------|------------------------------------------------------|-----------------------|--------------------------------|------------------------------|-----------------------|
| Project 13 1450 | Landscaping | 15876 | Project 13 | | 0 |
| Subtotal | | 15876 | | | 0 |
| HA – WIDE | Operations - 1406 | 18,000 | HA - WIDE | Operations | 18,000 |
| | Administration 1410 | 28,235 | | Administration | 28,235 |
| 1408 | Management Imp. – New Computer Software System | 56,471 | | Software Upgrades | 5,000 |
| 1475 | Two work Stations | 6,000 | | Two work stations | 6,000 |
| Subtotal | | 108,706 | | | 57,235 |
| Total CFP Estimated Cost | | \$282,359 | | | \$282,359 |

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

| | | |
|-----------------------------------------------|---------------------------------------------------------------------------------------------------------------|------------------------------|
| PHA Name: Housing Authority of Jackson County | Grant Type and Number Capital Fund Program Grant No: OR16P01550101 Replacement Housing Factor Grant No: | Federal FY of Grant: 2001 |
|-----------------------------------------------|---------------------------------------------------------------------------------------------------------------|------------------------------|

Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending:
 Final Performance and Evaluation Report
June 30, 2002

| Line No. | Summary by Development Account | Total Estimated Cost | | Total Actual Cost | |
|----------|-----------------------------------------------------------|----------------------|---------|-------------------|----------|
| | | Original | Revised | Obligated | Expended |
| 1 | Total non-CFP Funds | | | | |
| 2 | 1406 Operations | 90,377 | | 90,377 | 90,377 |
| 3 | 1408 Management Improvements | 10,000 | | 4,135 | 4,135 |
| 4 | 1410 Administration | | | | |
| 5 | 1411 Audit | | | | |
| 6 | 1415 Liquidated Damages | | | | |
| 7 | 1430 Fees and Costs | | | | |
| 8 | 1440 Site Acquisition | | | | |
| 9 | 1450 Site Improvement | 2,600 | | | |
| 10 | 1460 Dwelling Structures | 69,400 | | | |
| 11 | 1465.1 Dwelling Equipment—Nonexpendable | | | | |
| 12 | 1470 Nondwelling Structures | 125,000 | | | |
| 13 | 1475 Nondwelling Equipment | | | | |
| 14 | 1485 Demolition | | | | |
| 15 | 1490 Replacement Reserve | | | | |
| 16 | 1492 Moving to Work Demonstration | | | | |
| 17 | 1495.1 Relocation Costs | | | | |
| 18 | 1499 Development Activities | | | | |
| 19 | 1501 Collateralization or Debt Service | | | | |
| 20 | 1502 Contingency | | | | |
| 21 | Amount of Annual Grant: (sum of lines 2 – 20) | 297,377 | | 94,512 | 94,512 |
| 22 | Amount of line 21 Related to LBP Activities | | | | |
| 23 | Amount of line 21 Related to Section 504 compliance | | | | |
| 24 | Amount of line 21 Related to Security – Soft Costs | | | | |
| 25 | Amount of Line 21 Related to Security – Hard Costs | | | | |
| 26 | Amount of line 21 Related to Energy Conservation Measures | | | | |

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

Part II: Supporting Pages

| PHA Name: Housing Authority of Jackson County | | Grant Type and Number Capital Fund Program Grant No: OR16P01550101 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2001 | | | |
|-----------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|----------|----------------------|------------------------------|-------------------|----------------|----------------|
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work |
| | | | | Original | Revised | Funds Obligated | Funds Expended | |
| HA – WIDE | Operations | 1406 | | 90,377 | | 90,377 | 90,377 | Complete |
| HA – WIDE | Management Improvements, Computer Enhancements | 1408 | | 10,000 | | 4,135 | 4,135 | In Process |
| Project 02 | Furnaces, Exterior Paint | 1460 | | 9,059 | | 0 | 0 | In Process |
| Project 03 | Roofs, Furnaces, Exterior Paint | 1460 | | 16,089 | | 0 | 0 | In Process |
| Project 04 | Roofs | 1460 | | 18,849 | | 0 | 0 | In Process |
| Project 05 | Roofs | 1460 | | 5,880 | | 0 | 0 | In Process |
| Project 06 | Furnaces, Exterior Paint | 1460 | | 8,149 | | 0 | 0 | In Process |
| Project 09 | Roof, Furnaces | 1460 | | 11,374 | | 0 | 0 | In Process |
| Project 09 | Fence | 1450 | | 2,600 | | 0 | 0 | In Process |
| HA - WIDE | Non Dwelling Structures, Office expansion for Community Room | 1470 | | 125,000 | | 0 | 0 | In Process |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
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**Annual Statement/Performance and Evaluation Report
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
 Part III: Implementation Schedule**

| PHA Name: Housing Authority of Jackson County | | Grant Type and Number Capital Fund Program No: OR16P01550101 Replacement Housing Factor No: | | | | Federal FY of Grant: 2001 | |
|--------------------------------------------------|---------------------------------------------|---------------------------------------------------------------------------------------------------|--------|---------------------------------------------|---------|------------------------------|---------------------------------------|
| Development Number Name/HA-Wide Activities | All Fund Obligated (Quarter Ending Date) | | | All Funds Expended (Quarter Ending Date) | | | Reasons for Revised Target Dates |
| | Original | Revised | Actual | Original | Revised | Actual | |
| HA – WIDE, 1406 | Dec., 2002 | | | June, 2004 | | | |
| HA – WIDE, 1408 | Dec., 2002 | | | June, 2004 | | | |
| Project 02, 1460 | Dec., 2002 | 3-31-03 | | June, 2004 | | | Staff Changes and Program Development |
| Project 03, 1460 | Dec., 2002 | 3-31-03 | | June, 2004 | | | Staff Changes and Program Development |
| Project 04, 1460 | Dec., 2002 | 3-31-03 | | June, 2004 | | | Staff Changes and Program Development |
| Project 05, 1460 | Dec., 2002 | 3-31-03 | | June, 2004 | | | Staff Changes and Program Development |
| Project 06, 1460 | Dec., 2002 | 3-31-03 | | June, 2004 | | | Staff Changes and Program Development |
| Project 09, 1460 | Dec., 2002 | 3-31-03 | | June, 2004 | | | Staff Changes and Program Development |
| Project 09, 1450 | Dec., 2002 | 3-31-03 | | June, 2004 | | | Staff Changes and Program Development |
| HA – WIDE, 1470 | Dec., 2002 | 3-31-03 | | June, 2004 | | | Staff Changes and Program Development |
| | | | | | | | |
| | | | | | | | |
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| | | | | | | | |

CAPITAL FUND PROGRAM TABLES START HERE
Housing Authority of Jackson County OR015
Attachment OR015a01

| Annual Statement/Performance and Evaluation Report | | | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|---------|-------------------|------------------------------|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary | | | | | |
| PHA Name: Housing Authority of Jackson County | | Grant Type and Number Capital Fund Program Grant No: OR16P01550102 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2002 |
| <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no: 1) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report June 30, 2002 | | | | | |
| Line No. | Summary by Development Account | Total Estimated Cost | | Total Actual Cost | |
| | | Original | Revised | Obligated | Expended |
| 1 | Total non-CFP Funds | | | | |
| 2 | 1406 Operations | 110,919 | 0 | | |
| 3 | 1408 Management Improvements | 0 | 56,471 | | |
| 4 | 1410 Administration | 0 | 28,235 | | |
| 5 | 1411 Audit | | | | |
| 6 | 1415 Liquidated Damages | | | | |
| 7 | 1430 Fees and Costs | | | | |
| 8 | 1440 Site Acquisition | | | | |
| 9 | 1450 Site Improvement | | | | |
| 10 | 1460 Dwelling Structures | 68,000 | 68,000 | | |
| 11 | 1465.1 Dwelling Equipment—Nonexpendable | | | | |
| 12 | 1470 Nondwelling Structures | 125,000 | 125,000 | | |
| 13 | 1475 Nondwelling Equipment | 0 | 4,653 | | |
| 14 | 1485 Demolition | | | | |
| 15 | 1490 Replacement Reserve | | | | |
| 16 | 1492 Moving to Work Demonstration | | | | |
| 17 | 1495.1 Relocation Costs | | | | |
| 18 | 1499 Development Activities | | | | |
| 19 | 1501 Collateralization or Debt Service | | | | |
| 20 | 1502 Contingency | | | | |
| 21 | Amount of Annual Grant: (sum of lines 2 – 20) | 303,919 | 282,359 | | |
| 22 | Amount of line 21 Related to LBP Activities | 0 | 0 | | |
| 23 | Amount of line 21 Related to Section 504 compliance | 0 | 0 | | |
| 24 | Amount of line 21 Related to Security – Soft Costs | 0 | 0 | | |
| 25 | Amount of Line 21 Related to Security – Hard Costs | 0 | 0 | | |
| 26 | Amount of line 21 Related to Energy Conservation Measures | 46,000 | 46,000 | | |

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

| PHA Name: Housing Authority of Jackson County | | Grant Type and Number Capital Fund Program Grant No: OR16P01550102 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2002 | | | |
|-----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|----------------------|------------------------------|-------------------|----------------|----------------|
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work |
| | | | | Original | Revised | Funds Obligated | Funds Expended | |
| HA-Wide | Operations | 1406 | | 110,919 | 0 | | | |
| HA-Wide | Management Improvements – Computer Software, Systems Developer | 1408 | | 0 | 56,471 | | | In Planning |
| HA-Wide | Administration | 1410 | | 0 | 28,235 | | | |
| Project 02 | Insulation, window and/or slider replacements to four single family houses. Exterior paint on four single family houses. | 1460 | 4 units weatherized - \$2096 4 units painted - \$8800 | 10,896 | 10,896 | | | In Planning |
| Project 03 | Insulation, window and/or slider replacements to fourteen single family houses. Exterior paint on two single family houses. | 1460 | 14 units weatherized - \$23307 2 units painted - \$4400 | 27,707 | 27,707 | | | In Planning |
| Project 05 | Insulation, window and/or slider replacements to four single family houses | 1460 | 4 units weatherized - \$2968 | 2,968 | 2,968 | | | In Planning |
| Project 06 | Insulation, window and/or slider replacements to nine single family houses. Exterior Paint on three single family houses. | 1460 | 9 units weatherized - \$11363 3 units painted - \$6600 | 17,963 | 17,963 | | | In Planning |
| Project 09 | Insulation, window and/or slider replacements to six single family houses. Exterior paint on one single family house. | 1460 | 6 units weatherized - \$6266 1 unit painted - \$2200 | 8,466 | 8,466 | | | In Planning |

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

| PHA Name: Housing Authority of Jackson County | | Grant Type and Number Capital Fund Program Grant No: OR16P01550102 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2002 | | | |
|--------------------------------------------------|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|----------|----------------------|------------------------------|--------------------|-------------------|-------------------|
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work |
| | | | | Original | Revised | Funds Obligated | Funds Expended | |
| Non Dwelling Structures | The second half of an office expansion for the purpose of adding a community room | 1470 | | 125,000 | 125,000 | | | In Planning |
| Non Dwelling Equipment | Computer Hardware | 1475 | | 0 | 4,653 | | | In Planning |

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

| PHA Name: Housing Authority of Jackson County | | Grant Type and Number Capital Fund Program No: OR16P01550102 Replacement Housing Factor No: | | | Federal FY of Grant: 2002 | | |
|--------------------------------------------------|---------------------------------------------|---------------------------------------------------------------------------------------------------|--------|---------------------------------------------|------------------------------|--------|----------------------------------|
| Development Number Name/HA-Wide Activities | All Fund Obligated (Quarter Ending Date) | | | All Funds Expended (Quarter Ending Date) | | | Reasons for Revised Target Dates |
| | Original | Revised | Actual | Original | Revised | Actual | |
| HA-WIDE | December 2003 | | | June, 2005 | | | |
| Dwelling, Projects 02,03,05,06,09 | December 2003 | | | June, 2005 | | | |
| Non Dwelling Structures | December 2003 | | | June, 2005 | | | |
| | | | | | | | |