

*PHA Plans for the  
Housing Authority of the  
City of McKinney*

5 Year Plan for Fiscal Years 2003 - 2007  
Annual Plan for Fiscal Year 2003

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

**PHA Plan  
Agency Identification**

**PHAName:** *Housing Authority of the City of McKinney*

**PHANumber:** *TX027*

**PHAFiscal Year Beginning:** (mm/yyyy) *07/2003*

**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**  
**PHAF ISCAL YEARS 2003 -2006**  
[24CFRPart903.5]

**A.Mission**

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

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

*The Housing Authority's mission is to be results oriented and citizen -centered as it strives to serve the needs of low -income, very low -income and extremely low-income families in the PHA's jurisdiction and to (1) increase the availability of decent, safe and affordable housing in its communities; (2) ensure equal opportunity in housing; (3) promote self -sufficiency and asset development of families and individuals; and (4) improve community quality of life and economic viability.* **The Housing Authority shall use its financial, administrative and human resources to provide residents with opportunities to obtain affordable housing, to take part in community life and governance, to build healthy family relationships and cultural values, to participate in establishing standards of acceptable behavior in their community and to access a wide range of personal, educational and economic opportunities.**

**B.Goals**

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHA 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 EN COURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS .** (Quantifiable measures would include target such as: numbers of families served or PHAS scores achieved.) PHA should identify these measures in the space 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: **When NOFA's are published**
  - Reduce public housing vacancies:

- Leverage private or other public funds to create additional housing opportunities:
- Acquire or build units or developments **PHA Plan to apply for funding. Depending on money received this will determine how many units will be built.**
- Other (list below)

**Progress Statement:** During FYB2002, the PHA was successful in building two duplexes. Plans for the upcoming year are to build a high rise for senior citizens.

- PHA Goal: Improve the quality of assisted housing  
Objectives:
  - Improve public housing management: (PHAS score)  
**Maintain high performer status**
  - Improve voucher management: (SEMAP score)  
**Maintain passing score**
  - Increase customer satisfaction: **On-going activity.**
  - 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)

**Progress Statement:** During FYB2002, the PHA completed the last stage of its single construction contract to change the appearance of the buildings so that they look like market rentals. Work items on this contract included concrete walkways, concrete steps, fascia, etc.

- PHA Goal: Increase assisted housing choices  
Objectives:
  - Provide voucher mobility counseling: **A team briefing for new participants and with each unit transfer for current participants.**
  - Conduct outreach efforts to potential voucher landlords **The PHA will conduct outreach to landlords.**
  - Increase voucher payment standards **, when needed (ongoing activity)**
  - 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)

**Progress Statement:** During FY2002, the PHA was successful in achieving the objectives selected and will continue on an on-going basis.

**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) **Maintain existing program, i.e., police patrol, fencing, crime -watch program.**

**Progress Statement** – During FYB 2002, the PHA has been successful in achieving this goal.

**HUD Strategic Goal: Promote self-sufficiency and asset development of families and individuals –N/A**

- 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 support services to improve assistance recipients' employability:
  - Provide or attract support services to increase independence for the elderly or families with disabilities.
  - Other: (list below)

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

- 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: **Units are handicapped accessible.**
  - Other: (list below)

**Progress Statement:** During FYB2002, the PHA Board's plan to build a 4plex for housing persons with disabilities became a reality when they were completed in January 2003.

**Other PHA Goals and Objectives: (list below)**

**Planning and Administration**

- PHA Goal: Knowledge of New Laws and Changes in Housing Needs  
Objectives:
  - *On-going, through continuous training, the PHA will make the staff and board members knowledgeable as needed regarding the new housing requirements as they occur.*
  - *On-going, the PHA may utilize funds to coordinate the planning activities for the development of the annual plan, budgets, and conduct training, necessary surveys, meetings and reviews.*
  
- PHA Goal: Up -To-Date Policies –New, Revised or Reviewed  
Objective:
  - *On-going, existing policies and procedures will be reviewed to incorporate all necessary requirements and if warranted, develop written recommendations for policy revisions to the Board of Commissioners. The PHA may contract with professionals for these services.*
  
- PHA Goal: Operational Provisions  
Objective:
  - *On-going, the PHA shall provide for staffing, training, equipment, facilities and other related items to ensure the efficient administration, management, supervision, human, economic and community resource development, procurement, fiscal management, reporting and auditing of PHA operations. The activities may be budgeted and charged as a direct program cost on a pro-rated basis or as planning and administrative costs, as budgeted.*
  
- PHA Goal: Develop and Maintain Database  
Objective:
  - *Ongoing, the PHA shall appoint staff members to gather, input data, and maintain information by county, census data, community profiles, participant and applicant data. Data will be updated as needed or annual basis to provide for needs of agency and agency representatives.*
  
- PHA Goal: Reimbursement for Plan Development Cost  
Objective:
  - *On-going, the PHA shall provide for the reimbursement of administrative costs associated with the development of the Five Year or Annual Plan(s).*

- PHAGoal:ReviewAnnualPlanandBudgets,PrepareModificationsor Revisions  
Objective:
  - Annually,thePHAshallre viewtheannualplangoals,objectives,budgets, andprepareneededmodificationsbaseduponthesereviewsandidentified constraintsordelaysinimplementationandsubmitforapprovalbythe BoardofCommissioners.

**ProgressStatement** –DuringFYB2002th ePHAwassuccessfulinachievinggoals. TheBoardofCommissionersapprovedupdatedandrevisedpoliciesthroughoutthe year.ThePHAstaffattendedvarioustrainingssessionsonmaintenance,Section8, PublicHousingandPHAS.

### **FinancialResources**

- PHA Goal:ManagementofResources  
Objective:
  - *On-going, the PHA shall obtain assistance in providing written financial management and investment of funds procedures that comply with applicable regulatory requirements to be approved by the Board of Commissioners.*
  
- PHAGoal:ManagementOperationalServices  
Objectives:
  - *On-going, the PHA establishes internal procedures and public housing marketingstrategiestomeettheincometargetingstipulations.*
  
- PHAGoal:PositiveCashFlow  
Objective:
  - *By 6 -30-03, the PHA may establish a reserve for the repair and replacement of components for housing units and provide for future funding for modernization repairs and replacements and other housing purposesasidentifiedinfutureyears.*
  - *The PHA shall continue activities for the Section 8 rental assistance programoperations.*
  - *By 6 -30-03, the PHA will draw down funds as allowed for investments and/or operations and invest these funds in approved investments according to regulatory requirements, amounts allowed for the purpose andtheinvestmentpolicyofthePHA.*

**ProgressStatement** –ItemsthatarescheduletobecompletedduringFYB2002are onscheduleforcompletion.

## Housing Management Services

### ■ PHA Goal: Continue Operation and Administration of Housing Units.

#### Objective:

- *On-going, the PHA will provide for the development and maintenance of a waiting list of applicants in accordance with program regulations.*
- *On-going, the PHA will maintain data relative to housing stock and participants/occupants.*
- *On-going, the PHA will provide for updating of applicant data as changes occur, and for the verification of the applicant data prior to admission.*
- *By 6 -30-03, the PHA will contract with a professional to perform a job comparability study and review organizational structure and write new job descriptions.*
- *By 6 -30-03, the PHA will seek professional assistance in preparing a Physical Needs Assessment.*
- *On-going, according to regulations and policies, the PHA will maintain housing and home ownership units in standard condition.*
- *By 6 -30-03, the PHA will provide for insurance, inspections, renovations and construction or repairs and other needs as determined by a Physical Needs Assessment.*
- *On-going, the PHA will like participants to housing and supportive services including, housing counseling, case management, consumer education, budgeting, credit counseling, maintenance, and other housing supportive services.*

**Progress Statement** – Every building at the Senior Citizen complex has been made completely handicapped accessible. The City's comparability has been completed but not presented to the City Council. The PHA still intend to use it as a comparison for updating its own, as soon as presented to the Council.

## Modernization

### ■ PHA Goal: Service and Activities

#### Objective:

- *To provide staffing, facilities, equipment and other related costs for the provision of modernization services and activities as detailed below:*
  - *On-going, the purchase of construction equipment, materials and supplies.*
  - *By 6 -30-03, warehouse and inventory of materials, equipment and supplies.*
  - *By 6 -30-03, complete modernization repairs as detailed within the plan to provide for the rehabilitation of units. On-going with vacated units.*
  - *On-going, provide training concerning the Uniform Inspection System used by HUD.*
  - *On-going, provide for annual unit inspections.*
  - *On-going, ensure inspection code compliance.*

- *On-going, provide for all accounts receivable, payable and records management.*
- *On-going, provide monthly and other required reports.*
- *On-going, provide for program fund audits.*

■ PHA Goal: Continuation of Modernization Activities

Objectives:

- *On-going, continue the modernization activities as previously awarded according to existing agreements, budgets and timelines and provide additional assistance using HUD funds.*
- *Annually, the PHA will continue to identify future needs for the development of future plans.*

■ PHA Goal: Funding for Affordable Housing

Objectives:

- *Annually, utilize HUD and/or other funding for affordable housing activities through equity investments, interest-bearing loans or advances, non-interest bearing loans or advances interest subsidies, loan guarantees or any other form of assistance that has been determined to be consistent with the HUD purpose.*
- *On-going, the PHA will invest funding as budgeted for affordable housing activities as previously detailed. Interest of the invested funds may be placed into a reserve for future rehabilitation/modernization of PHA units.*
- *On-going, the PHA will develop program guidelines for the delivery of homeownership construction programs that utilize the investment funding earned or leveraged for affordable housing activities. The activity plans will be developed and incorporated into subsequent annual plans.*
- *On-going, to provide for the construction of 24 units by utilizing leveraged funding and/or resources other than HUD funding.*

■ PHA Goal: Funding for Affordable Housing Activities

Objective:

- *By 6-30-03, utilize HUD and/or other funding for affordable housing activities that have been determined to be consistent with the HUD purposes. Interest earned from the investments may be placed into a rehabilitation program reserve to establish funding for the program and for use in future years.*
- *By 6-30-03, the PHA will invest funds as budgeted for affordable housing activities as outlined in goal.*
- *By 6-30-04, the PHA will develop program guidelines for the delivery of homeownership acquisition programs that utilize the investment funding earned/leveraged for affordable housing activities, the activity plans will be developed and incorporated into subsequent annual plans.*

**Progress Statement** –During FYB2002, the construction funds requested in the 2002 Capital Fund Program were approved. The PHA expects to request bid proposals by September 2003.

## **Rehabilitation**

- PHA Goal: Promotion of Resident Services  
Objectives:
  - *On-going, to maintain activities and services that promote homeownership, self-sufficiency, resident organizations and community development.*
  - *On-going, promote resident and resident organization activities in the area of:
    - *Fire-safety*
    - *Child-safety*
    - *Crime prevention**
  
- PHA Goal: Provision for Safety and Crime Prevention  
Objective:
  - *On-going, the PHA shall provide for the provision of PHA security services, the provision of crime prevention and safety services/activities of PHA properties in accordance with identified needs, budgets and in consultation with local law enforcement.*
  - *On-going, the officers shall provide for patrolling of housing areas, security services, crime prevention and safety activities according to job descriptions, policies and procedures.*

**Progress Statement** –The affordable homes built and sold to “blue collar” workers during 2002 was so successful that additional lots have been purchased in order to continue this activity.

## **Section 8 Program Management Assessment Program**

- PHA Goal: Indicator #1 (15 points) Section 8 Waiting List  
Objectives: To obtain the maximum score under SEMAP Indicator #1
  - *On-going, have a written admissions policies in the Administrative Plan and demonstrate that 98% of the applicants/admission swere selected from the waiting list in accordance with the policies.*
  - *On-going, adopt a written Administrative Plan including Waiting List Selection criteria.*
  
- PHA Goal: Indicator #2 (20 points) Rent Reasonableness  
Objective: To obtain the maximum score under SEMAP Indicator #2
  - *On-going, the PHA has a written method and documents at least 98% at initial lease.*
  
- PHA Goal: Indicator #3 (20 points) Determination of Adjusted Income

Objective: To obtain the maximum score under SEMAP Indicator #3

- *On-going, in at least 90% of sample files, the PHA obtains and uses third party verification of reported income (or file documents why it was not obtained); the PHA applies the correct deductions; and uses the appropriate utility allowances for the leased unit.*
- *On-going, review and revise verification systems as needed.*

■ PHA Goal: Indicator #4 (5 points) Utility Allowance Schedule

Objective: To obtain the maximum score under SEMAP Indicator #4

- *Annually, the PHA has reviewed utility rates with in twelve months and adjusted schedule if there has been a change of 10% or more in a utility rates since the last schedule was revised.*
- *Maintain annually the system developed to document annual utility allowance reviews.*
- *Maintain annually, the system developed to perform the annual review.*

■ PHA Goal: Indicator #5 (5 points) HQS Quality Control Inspection

Objective: To obtain the maximum score under SEMAP Indicator #5

- *On-going, five percent (5%) of approved unit inspections are re-inspected for quality control.*
- *On-going, procedures in place to track and document.*

■ PHA Goal: Indicator #6 (10 points) Housing Quality Standard Enforcement

Objective: To obtain the maximum score under SEMAP Indicator #6

- *On-going, the PHA takes appropriate action; correction of life-threatening deficiencies within 24 hours and in at least 98% of sample files, all HQS deficiencies are corrected within 30 days (or within PHA extension). If family is determined to have caused certain defects, the PHA takes prompt action to enforce family obligations.*
- *On-going, develop and implement procedures to meet goal.*

■ PHA Goal: Indicator #7 (5 points) Expanding Housing Opportunities

Objective: To obtain the maximum score under SEMAP Indicator #7

- *On-going, the PHA will adopt and implement a written policy and take action to encourage participation by owners outside; provide maps of jurisdiction and neighboring jurisdictions; provide a list of owners willing to rent to Section 8 or organization to help families find units outside poverty areas; explains portability in briefings and provide 3s contact; analyzes families difficulties findings units and seeks HUD approval for area exception rent if applicable.*
- *On-going, to keep participant families aware of the full range of areas where they may lease units, including a list of landlords or other parties, both inside and outside of the PHA's jurisdiction, and that are in low poverty and minority areas.*

- PHAGoal:Indicator#8(5points)FairMarketRent  
Objective:ToobtainthemaximumscoreunderSEMAPIndicator#8

  - *On-going,excludingtheover-FMRtenancies,thePHAwillmakecertainat least98%ofinitialcertificategrossrentsareatorbelowFMR/exceptions rentandvoucherpaymentsstandardisnogreaterthanFMR/exceptionrent andisnotlessthan80%ofFMR/exceptionrentlimit(unlessapprovedby HUD).*
  - *On-going,verifyMTCSdata.*
  
- PHAGoal:Indicator#9(10points)AnnualRe-examinations  
Objective:ToobtainthemaximumscoreunderSEMAPIndicator#9

  - *On-going,lessthan5%offree-examsareconductedlate.*
  - *Maintainestablishe dsystemstomonitordocumentannualre-exams.*
  - *On-going,verifyproperMTCSreporting.*
  
- PHAGoal:Indicator#10(5points)CorrectTenantRentCalculations  
Objective:ToobtainthemaximumscoreunderSEMAPIndicator#10

  - *On-going,twopercent(2%)offewer rentcalculationserrors.*
  - *On-going,reviewandreviseproceduresasneeded.*
  
- PHAGoal:Indicator#11(5points)Pre-ContractInspection  
Objective:ToobtainthemaximumscoreunderSEMAPIndicator#11

  - *Two percent (2%) or more units passed inspection before the HAP contract effective date.*
  - *On-going,developprocedures to make certain that all newly leased units passHQSinspectiononorbeforethebeginningdateoftheassistedlease andHAPcontract.*
  
- PHAGoal:Indicator#12(10points)AnnualHQSInspections  
Objective:ToobtainthemaximumscoreunderSEMAPIndicator#12

  - *On-going,fewerthanfivepercent(5%)ofHQSannualinspectionsarenot madewithina12monthperiod.*
  - *On-going,establishprocedures to conduct on-timeHQSinspections on all unitsunderleaseatleasteverytwelve(12)months.*

**Progress Statement** –During2002,QualityControlforHQSiscontinuestobe functional.TheSEMAPscorehasnotbeenpublished.

**AnnualPHAPlan**  
**PHAFiscalYear2003**  
[24CFRPart903.7]

**i. AnnualPlanType:**

Selectw hichtypeofAnnualPlanthePHAwillsubmit.

**StandardPlan**

**StreamlinedPlan:**

- HighPerformingPHA**
- SmallAgency(<250PublicHousingUnits)**
- AdministeringSection8Only**

**TroubledAgencyPlan**

**ii. ExecutiveSummaryoftheAnnualPHAPlan**

[24CFRPart903.79(r)]

ProvideabriefoverviewoftheinformationintheAnnualPlan,includinghighlights ofmajorinitiatives anddiscretionarypolicies thePHAhasincludedi ntheAnnualPlan.

*The Housing Authority of the City of McKinney, Texas has prepared this Annual PHA Plan in compliance with Section 511 of the Quality Housing and Work Responsibility Act of 1998 and the ensuing HUD requirements.*

*The purpose of the Annual Plan is to provide a framework for local accountability and an easily identifiable source by which public housing residents, participants in the tenant-based assistance program and other members of the public may locate basic PHA policies, rules and requirements related to the operations, programs and services of the agency.*

*The Mission Statement and the Goals and Objectives were based on information contained in our jurisdiction's Consolidated Plan and will assure that our residents will receive the best customer service.*

*Excellent customer service and fulfillment of the Mission Statement and Goals and Objectives is ensured by implementation of a series of policies that are on display with this Plan. The Admissions and Occupancy Policy and Section 8 Administrative Plan are the two primary policies on display. These important documents cover the public housing tenant selection and assignment plan, outreach services, PHA's responsibility to Section 8 owners/landlords, grievance procedures, etc.*

*The most important challenges to be met by the Housing Authority of the City of McKinney during FY2003 include:*

- *Preserve and improve the public housing stock through the Capital Funds activities;*
- *Involve the public housing residents and the Section 8 participants through the Annual Plan Resident Advisory Board;*
- *Train staff and commissioners to fully understand and take advantage of opportunities in the new law and regulations to better serve our residents and the community; and*
- *Identify, develop and leverage services to enable low -income families to become self-sufficient.*

*In closing, this Annual PHA Plan exemplifies the commitment of the Housing Authority of the City of McKinney to meet the housing needs of the full range of low -income residents. The Housing Authority of the City of McKinney, in partnership with agencies from all levels of government, the business community, non -profit community groups, and residents will use this plan as a road map to reach the “higher quality of life” destination for the City of McKinney and Collin County.*

### **iii. Annual Plan Table of Contents**

[24CFR Part 903.79(r)]

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

#### **Table of Contents**

	<u>Page#</u>
<b>Annual Plan</b>	
i. Executive Summary	1
ii. Table of Contents	2
1. Housing Needs	7
2. Financial Resources	14
3. Policies on Eligibility, Selection and Admissions	15
4. Rent Determination Policies	24
5. Operations and Management Policies	28
6. Grievance Procedures	30
7. Capital Improvement Needs	31
8. Demolition and Disposition	33
9. Designation of Housing	34
10. Conversions of Public Housing	35
11. Homeownership	37
12. Community Service Programs	39
13. Crime and Safety	42
14. Pets (Inactive for January 1 PHAs)	43
15. Civil Rights Certifications (included with PHA Plan Certifications)	43

16. Audit	44
17. Asset Management	44
18. Other Information	45

### 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 filename in parentheses in the space to the right of the title.

#### Required Attachments:

- Admissions Policy for Deconcentration **-tx027a02**
- FY2003 Capital Fund Program Annual Statement **tx027b02**
- Most recent board -approved operating budget (Required Attachment for PHA's that are troubled or at risk of being designated troubled ONLY)
- Other (List below, providing each attachment name)
  - Substantial Deviation and Significant Amendment or Modification* **-tx027d02**
  - Pet Policy (family)* **tx027e02**
  - Pet Policy (elderly/disabled)* **tx027f02**
  - Resident Member on the PHA Governing Board* **tx027g02**
  - Membership of the Resident Advisory Board or Boards* **tx027h02**
  - Summary of Policy or Program Changes for the Upcoming Year* **tx027i02**
  - Section 8 Homeownership Capacity Statement* **tx027j02**
  - Deconcentration attachment* **tx027k02**
  - Voluntary Conversion assessment* **tx027l02**

#### Optional Attachments:

- PHA Management Organizational Chart
- FY2003 Capital Fund Program 5 Year Action Plan **tx027c02**
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- Other (List below, providing each attachment name)
  - 2000 Performance and Evaluation Report* **tx027m02**
  - 2001 Performance and Evaluation Report* **tx027n02**
  - 2002 Performance and Evaluation Report* **tx027o02**

## Supporting Documents Available for Review

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

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

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
<b>X</b>	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
<b>X</b>	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
<b>X</b>	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A&O Policy	Annual Plan: Grievance Procedures
<b>X</b>	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
<b>X</b>	The HUD -approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
<b>X</b>	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
<b>X</b>	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
<b>N/A</b>	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
<b>N/A</b>	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
<b>N/A</b>	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
<b>N/A</b>	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
<b>N/A</b>	Approved or submitted public housing home ownership programs/plans	Annual Plan: Homeownership
<b>N/A</b>	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
<b>X</b>	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
<b>N/A</b>	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
<b>N/A</b>	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
<b>N/A</b>	The most recent Public Housing Drug Elimination Program (PHDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
<b>X</b>	The most recent fiscal year audit of the PHA conducted	Annual Plan: Annual Audit

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	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	
<i>N/A</i>	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

# 1.StatementofHousingNeeds

[24CFRPart903.79(a)]

## **A.HousingNeedsofFamiliesintheJurisdiction/sServedbythePHA**

Basedupontheinformationcontain edintheConsolidatedPlan/sapplicabletothejurisdiction,and/or otherdataavailabletothePHA,provideastatementofthehousingneedsinthejurisdictionbycompleting thefollowingtable.Inthe“Overall”Needscolumn,providetheestimatednumb erofrenterfamiliesthat havehousingneeds.Fortheremainingcharacteristics,ratetheimpactofthatfactoronthehousingneeds foreachfamilytype,from1to5,with1being“noimpact”and5being“severeimpact.”UseN/Ato indicatethatno informationisavailableuponwhichthePHAcanmakethisassessment.

<b>HousingNeedsofFamiliesintheJurisdiction byFamilyType</b>							
FamilyType	Overall	Afford- ability	Supply	Quality	Access- ibility	Size	Loca- tion
Income<=30% ofAMI	<b>3,398</b>	<b>5</b>	<b>5</b>	<b>4</b>	<b>4</b>	<b>5</b>	<b>5</b>
Income>30%but <=50%ofAMI	<b>3,054</b>	<b>5</b>	<b>5</b>	<b>4</b>	<b>4</b>	<b>5</b>	<b>5</b>
Income>50%but <80%ofAMI	<b>6,560</b>	<b>5</b>	<b>5</b>	<b>4</b>	<b>4</b>	<b>5</b>	<b>5</b>
Elderly	<b>1,591</b>	<b>5</b>	<b>5</b>	<b>4</b>	<b>4</b>	<b>5</b>	<b>5</b>
Familieswith Disabilities	<b>*</b>	<b>5</b>	<b>5</b>	<b>4</b>	<b>4</b>	<b>5</b>	<b>5</b>
<i>Black</i>	<b>908</b>	<b>5</b>	<b>5</b>	<b>4</b>	<b>4</b>	<b>5</b>	<b>5</b>
<i>Hispanic</i>	<b>1,389</b>	<b>5</b>	<b>5</b>	<b>4</b>	<b>4</b>	<b>5</b>	<b>5</b>
<i>Other</i>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>

\* *Nod ataavailable*

WhatsourcesofinformationdidthePHAusetoconductthisanalysis?(Checkallthat apply;allmaterials mustbemadeavailableforpublicinspection.)

- ConsolidatedPlanoftheJurisdiction/s  
Indicateyear:
- U.S.Censusdata:theComprehensiveHousingAffordabilityStrategy(“CHAS”) dataset
- AmericanHousingSurveydata  
Indicateyear:
- Otherhousingmarketstudy  
Indicateyear:
- Othersources:(listandindicateyearofinformation)

## B. Housing Needsof Familieson thePublicHousingandSection8 Tenant-BasedAssistanceWaitingLists(PHA tosupply)

State thehousingneedsof thefamilieson thePHA'swaitinglist/s. **Completeonetableforeachtypeof PHA-widewaitinglistadministeredbythePHA.** PHA mayprovideseperatetablesforsite -basedor sub-jurisdictionalpublichousingwaitinglistsattheiropion.

HousingNeedsof Familieson theWaitingList			
Waitinglisttype:(selectone)			
<input type="checkbox"/> Section8tenant -basedassistance			
<input checked="" type="checkbox"/> PublicHousing			
<input type="checkbox"/> CombinedSection8andPublicHousing			
<input type="checkbox"/> PublicHousingSite -Basedorsub -jurisdictionalwaitinglist(optional)			
Ifused,identifywhichdevelopment/subjurisdiction:			
	#offamilies	%oftotalfamilies	AnnualTurnover
Waitinglisttotal	253		102
Extremelylow income<=30%AMI	177	70%	
Verylowincome (>30%but<= 50%AMI)	76	30%	
Lowincome (>50%but<80%AMI)	0	0	
Familieswith children	132	52%	
Elderlyfamilies	12	5%	
Familieswith Disabilities	22	9%	
Caucasian	114	45%	
African/American	81	32%	
Hispanic	51	21%	
Other	7	3%	
Characteristics by BedroomSize (PublicHousing Only)			
1BR	145	57%	18
2BR	74	30%	51
3BR	34	13%	33
4BR	0	0	
5BR	0	0	0
5+BR	0	0	0

HousingNeedsofFamilieson theWaitingList	
Isthewaitinglistclosed(selectone)?	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes
Ifyes:	
Howlonghasitbeenclosed(# ofmonths)?	
DoesthePHAexpecttoopentheListinthePHAPlanyear?	<input type="checkbox"/> No <input type="checkbox"/> Yes
DoesthePHApermitspecificcategoriesoffamiliesontothewaitinglist,evenifgenerallyclosed?	<input type="checkbox"/> No <input type="checkbox"/> Yes

HousingNeedsofFamiliesontheWaitingList			
Waitinglisttype:(selectone)			
<input checked="" type="checkbox"/> Section8tenant -basedassistance			
<input type="checkbox"/> PublicHousing			
<input type="checkbox"/> CombinedSection8andPublicHousing			
<input type="checkbox"/> PublicHousingSite -Basedorsub -jurisdictionalwaitinglist(optional)			
Ifused,identifywhichdevelopment/subjurisdiction:			
	#offamilies	%oftotalfamilies	AnnualTurnover
Waitinglisttotal	783		44
Extremelylow income<=30%AMI	579	74%	
Verylowincome (>30%but<=50%AMI)	180	23%	
Lowincome (>50%but<80%AMI)	24	3%	
Familieswith children	509	65%	
Elderlyfamilies	78	10%	
Familieswith Disabilities	91	12%	
Caucasian	324	41%	
African/American	316	40%	
Hispanic	116	15%	
Other	27	3%	
Characteristicsby BedroomSize (PublicHousing Only)			
1BR	N/A	N/A	N/A
2BR	N/A	N/A	N/A
3BR	N/A	N/A	N/A

Housing Needs of Families on the Waiting List			
4BR	N/A	N/A	N/A
5BR	N/A	N/A	N/A
5+BR	N/A	N/A	N/A
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes If yes: How long has it been closed (# of months)?    2 Does the PHA expect to open the list in the PHA Plan year? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes Does the PHA permit specific categories of families on to the waiting list, even if generally closed? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			

### C. Strategy for Addressing Needs

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

#### (1) Strategies

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

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

Select all that apply

- Employ effective maintenance and management policies to minimize the number of public housing units off -line
- Reduce turnover time for vacated public housing units
- Reduce time to renovate public housing units
- Seek replacement of public housing units lost to the inventory through mixed financed development
- Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources
- Maintain or increase section 8 lease -uprates by establishing payment standards that will enable families to rent throughout the jurisdiction
- Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- Maintain or increase section 8 lease -uprates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- Maintain or increase section 8 lease -uprates by effectively screening Section 8 applicants to increase owner acceptance of program
- Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- Other (list below)

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

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 w30% 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 the 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: N/A**

Select all that apply

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

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

**Strategy 1: Target available assistance to Families with Disabilities: N/A**

Select all that apply

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

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

**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)  
*Section 8 Counselors will implement a periodic landlord training seminar beginning May 2002.*

**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

[24CFR 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 these for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing support services, Section 8 tenant-based assistance, Section 8 support services or other.

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2003 grants)</b>		
a) Public Housing Operating Fund	286,706.00	
b) Public Housing Capital Fund	323,762.00	
c) HOPEVI Revitalization		
d) HOPEVI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	2,227,946.00	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants		
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
As of 12/31/02		
2001 CFP 70,171.33		
2002 CFP 334,626.00	404,857.33	Public housing capital improvements
<b>Sub-total</b>	<b>3,243,271.33</b>	
<b>3. Public Housing Dwelling Rental Income</b>	392,196.00	Public Housing Operations
<b>4. Other income (list below)</b>	341.04	Public Housing Operations
Interest on General Funds Investments:		
Other income: legal fees, maintenance;		
Charges to tenants, late fees, NSF check charges, etc.		
<b>4. Non-federal sources (list below)</b>		
<b>Sub-total</b>	392,537.04	
<b>Total resources</b>	<b>3,635,808.37</b>	

### **3.PHAPoliciesGoverningEligibility,Selection,andAdmissions**

[24CFRPart903.79 (c)]

#### **A.PublicHousing**

Exemptions:PHAsthatdonotadministerpublichousingarenotrequiredto completesubcomponent3A.

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

a. WhendoesthePHAverifyeligibilityforadmissiontopublichousing?(selectallthat apply)

- Whenfamiliesarewithinacertainnumberofbeingofferedaunit:(statenumber)  
***1-4(dependsonhowmanyunitsareavailable)***
- Whenfamiliesarewithinacertaintimeofbeingofferedaunit:(statetime)
- Other:(describe)

b. Whichnon -income(screening)factorsdoesthePHAusetoestablisheligibilityfor admissiontopublichousing(selectallthatapply)?

- CriminalorDrug -relatedactivity
- Rentalhistory
- Housekeeping
- Other(describe)
- Citizenship/LegalStatusCheck***

c.  Yes  No:DoesthePHArequestcriminalrecordsfromlocallawenforcement agenciesforscreeningpurposes?

d.  Yes  No:DoesthePHArequestcriminalrecordsfromStatelawenforcement agenciesforscreeningpurposes?

e.  Yes  No:DoesthePHAaccessFBIcriminalrecordsfromtheFBIfor screeningpurposes?(eitherdirectlyorthroughanNCIC - authorizedsource)

##### **(2)WaitingListOrganization**

a. WhichmethodsdoesthePHAplantousetoorganizeitstopublichousingwaitinglist (selectallthatapply)

- Community-widelist
- Sub-jurisdictionallists
- Site-basedwaitinglists
- Other(describe)

b. Wheremayinterestedpersonsapplyforadmissiontopublichousing?

- PHAmainadministrativeoffice
- PHAdevelopmentsitem anagementoffice
- Other(listbelow)

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

***The PHA will not operate site-based waiting lists***

1. How many site-based waiting lists will the PHA operate in the coming year? **0**
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: *N/A*

**(4) Admissions Preferences**

a. Income targeting:

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

b. Transfer policies:

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

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

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

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

2 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

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

4. Relationship of preferences to income targeting requirements:

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

**(5) Occupancy**

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

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

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

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

**(6) Deconcentration and Income Mixing** *see attachment tx027k02*

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

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

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

- Adoption of site-based waiting lists  
If selected, list targeted developments below:
- Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments  
If selected, list targeted developments below:
- Employing new admission preferences at targeted developments  
If selected, list targeted developments below:
- Other (list policies and development targeted below)

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

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

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

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

**N/A**

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

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

**N/A**

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

## B. Section 8

Exemptions: PHA 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) **Last known tenant address**  
**Current & previous landlords name and address**

### (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: **Documentation of difficulty, i.e., illness, death in family.**

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

3.IfthePH Awillemployadmissionspreferences,pleaseprioritizebyplacinga“1”in thespace thatrepresentsyourfirstpriority,a“2”intheboxrepresentingyour secondpriority,andsoon.Ifyougiveequalweighttooneormoreofthese choices(either throughanabsolutehierarchyorthroughapointsystem),placethe samenumbertoeach.Thatmeansyoucanuse“1”morethanonce,“2”more thanonce,etc.

1 DateandTime

FormerFederalpreferences

- 1 InvoluntaryDisplacement(Disaster,GovernmentAction,ActionofHousing Owner,Inaccessibility,PropertyDisposition)
- 1 Victimsofdomesticviolence
- 1 Substandardhousing
- 1 Homelessness
- 1 Highrentburden

Otherpreferences(selectallthatapply)

- 2 Workingfamiliesandthoseunabletoworkbecauseofageordisability
- Veteransandveterans’families
- 2 Residentstholiveand/orworkinyourjurisdiction
- 1 Thoseenrolledcurrentlyineducational,training,orupwardmobilityprograms
- Householdsthatcontribute tomeetingincomegoals(broadrangeofincomes)
- Householdsthatcontribute tomeetingincomerequirements(targeting)
- Thosepreviouslyenrolledineducational,training,orupwardmobility programs
- 1 Victimsofreprisalsorhatecrimes
- Otherpreference(s)(listbelow)

4.Amongapplicantsonthewaitinglistwiththeequalpreferencestatus,howare applicantsselected?(selectone)

- Dateandtimeofapplication
- Drawing(lottery)orotherrandomchoicetechnique

5.IfthePHAplanstoemploypreferencesfor“residentstholiveand/orworkinthe jurisdiction”(selectone)

- ThispreferencehaspreviouslybeenreviewedandapprovedbyHUD
- ThePHArequestsapprovalforthispreferencethroughthisPHAPlan

6.Relationshipofpreference toincometargetingrequirements:(selectone)

- ThePHAappliespreferenceswithinincometiery
- Notapplicable:thepoolofapplicantfamiliesensuresthatthePHAwillmeet incometargetingrequirements

**(5) Special Purpose Section 8 Assistance Programs**

a. In which documents or other reference materials are the policies governing eligibility, selection, and admission to any special -purpose section 8 program administered by the 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 program to the public?

- Through published notices
- Other (list below)

**4. PHA Rent Determination Policies**

[24 CFR Part 903.79(d)]

**A. Public Housing**

Exemptions: PHA 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 : **N/A**

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: **N/A**

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)

**Exclude increases in income up to \$450.00 annually**

e. Ceiling rents No ceiling rents effective 9/30/02

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)  
**N/A**

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) **N/A**

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

f. Rent re-determinations:

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

- Never
- At family option
- Anytime the family experiences an income increase
- Anytime a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold) **over \$450.00 ANNUALLY**
- Other (list below)

g.  Yes  No: Does the PHA plan to implement individual savings accounts for residents (ISAs) as an alternative to the required 12-month disallowance of fear net 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) **HUD set -a-side (Manor House Apartments)**

## 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) **N/A**

- 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)MinimumRent**

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** - *Not required –high performer*  
 [24CFR Part 903.79(e)]

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

**A. PHA Management Structure**

Describe the PHA's management structure and organization.

(select one)

- An organization chart showing the 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 Beginning	Expected Turnover
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.ManagementandMaintenancePolicies**

ListthePHA’spublichousingmanagementandmaintenancemaintenancepolicydocuments,manualsandhandbooks thatcontaintheAgency’srules,standards,andpoliciesgoverningmaintenanceandmanagementofpublic housing,inclodingadescriptionofanymeasuresnecessaryfortheventionoreradicationofpest infestation(whichincludescockroachinfestation)andthepoliciesgoverningSection8management.

(1)PublicHousingMaintenanceandManagement:(listbelow)

(2)Section8Management:(listbelow)

**6. PHA Grievance Procedures** – *Not Required – high performer*

[24CFR Part 903. 79(f)]

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

**A. Public Housing**

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

If yes, list additions to federal requirements below:

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

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

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

1.  Yes  No: Has the 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 24CFR 982?

If yes, list additions to federal requirements below:

2. Which PHA offices 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**

[24CFR Part 903.79(g)]

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

### **A. Capital Fund Activities**

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

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

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

Select one:

The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name) *tx027b02*

-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 Form 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) *tx027c02*  
*2000 Performance and Evaluation Report tx027m02*  
*2001 Performance and Evaluation Report tx027n02*  
*2002 Performance and Evaluation Report tx027o02*

-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.HOPEVI and Public Housing Development and Replacement Activities (Non -Capital Fund)

Applicability of sub -component 7B: All PHAs administering public housing. Identify any approved HOPEVI 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 HOPEVI revitalization grant? (if no, skip to question c; if yes, provide response to question b for each grant, copying and completing as many times as necessary)
- b) Status of HOPEVI revitalization grant (complete one set of questions for each grant)

1. Development name: *n/a*

2. Development (project) number:

3. Status of grant: (select the statement that best describes the current status)

- Revitalization Plan under development
- Revitalization Plans submitted, pending approval
- Revitalization Plan approved
- Activities pursuant to an approved Revitalization Plan underway

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

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

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

## **8. Demolition and Disposition**

[24CFR Part 903.79(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 N/A

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

<b>Demolition/Disposition Activity Description</b>	
1a. Development name:	
1b. Development (project) number:	
2. Activity type: 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.Designationof PublicHousingforOccupancybyElderlyFamilies orFamilieswithDisabilitiesorElderlyFamiliesandFamilieswith Disabilities**

[24CFRPart903.79(i)]

ExemptionsfromComponent9;Section8onlyPHAsarenotrequiredtocompletethissection.

1.  Yes  No: HasthePHAdesignatedorappliedforapprovaltodesignateor doesthePHAplantoapplytodesignateanypublichousingfor occupancyonlybytheelderlyfamiliesoronlybyfamilieswith disabilities,orb yelderlyfamiliesandfamilieswithdisabilitiesor willapplyfordesignationforoccupancybyonlyelderlyfamilies oronlyfamilieswithdisabilities,orbyelderlyfamiliesand familieswithdisabilitiesasprovidedbysection7oftheU.S. HousingActof1937(42U.S.C.1437e)intheupcomingfiscal year? (If“No”,skiptocomponent10.If“yes”,completeone activitydescriptionforeachdevelopment,unlessthePHAis eligibletocompleteastreamlinedsubmission;PHAscompleting streamlinedsubmissionsmayskiptocomponent10.)

2.ActivityDescription N/A

Yes  No: HasthePHAprovidedallrequiredactivitydescription informationforthiscomponentinthe **optional**PublicHousing AssetManagementTable?If “yes”,skiptocomponent10.If “No”,completetheActivityDescriptiontablebelow .

<b>DesignationofPublicHousingActivityDescription</b>	
1a.Developmentname:	
1b.Development(project)number:	
2.Designationtype:	
Occupancybyonlytheelderly	<input type="checkbox"/>
Occupancybyfamilieswithdisabilities	<input type="checkbox"/>
Occupancybyonlyelderlyfamiliesandfamilieswithdisabilities	<input type="checkbox"/>
3.Applicationstatus(selectone)	
Approved;includedinthePHA’sDesignationPlan	<input type="checkbox"/>
Submitted,pendingapproval	<input type="checkbox"/>
Plannedapplication	<input type="checkbox"/>
4.Datethisdesignationapproved,submitted,orplannedforsubmission: (DD/MM/YY)	
5.Ifapproved,willthisdesignationconstitutea(selectone)	
<input type="checkbox"/> NewDesignationPlan	
<input type="checkbox"/> Revisionofapreviously -approvedDesignationPlan?	
6. Numberofunitsaffected:	
7.Coverageofaction(selectone)	
<input type="checkbox"/> Partofthedevelopment	
<input type="checkbox"/> Totalde velopment	

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

[24CFR Part 903.79(j)]

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

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

1.  Yes  No: Have any of the PHA's developments or portions of developments been identified by HUD or the PHA as covered under section 202 of the HUD FY1996 HUD Appropriations Act? (If "No", skip to component 11; if "yes", complete one activity description for each identified development, unless eligible to complete as a streamlined submission. PHAs completing streamlined submissions may skip to component 11.)

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

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

Units addressed in a pending or approved HOPEVI Revitalization Plan  
(date submitted or approved: )

Requirements no longer applicable: vacancy rates are less than 10 percent

Requirements no longer applicable: site now has less than 300 units

Other: (describe below)

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

*Voluntary Conversion Required Initial Assessment tx027102*

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

# 11.HomeownershipProgramsAdministeredbythePHA

[24CFRPart903.79(k)]

## **A.PublicHousing**

ExemptionsfromComponent11A:Section8only PHAsarenotrequiredtocomplete11A.

1.  Yes  No: DoesthePHAadministeranyhomeownershipprograms administeredbythePHAunderanapprovedsection5(h) homeownershipprogram(42U.S.C.1437c(h)),oranapproved HOPE Iprogram(42U.S.C.1437aaa)orhasthePHAappliedor plantoapplytoadministeranyhomeownershipprogramsunder section5(h),theHOPEIprogram,orsection32oftheU.S. HousingActof1937(42U.S.C.1437z -4).(If“No”,skipto component 11B;if“yes”,completeoneactivitydescriptionfor eachapplicableprogram/plan,unlesseligibletocompletea streamlinedsubmissiondueto **smallPHA** or **highperforming PHA**status.PHAscompletingstreamlinedsubmissionsmayskip tocomponent11B.)

2.ActivityDescription N/A

Yes  No: HasthePHAprovidedallrequiredactivitydescription informationforthiscomponentinthe **optional**PublicHousing AssetManagementTable?(If“yes”,skiptocomponent12.If “No”,completetheActivityDescriptiontablebelow.)

<b>PublicHousingHomeownershipActivityDescription (Completeoneforeachdevelopmentaffected)</b>
1a.Developmentname: 1b.Development(project)number:
2.FederalProgramauthority: <input type="checkbox"/> HOPEI <input type="checkbox"/> 5(h) <input type="checkbox"/> TurnkeyIII <input type="checkbox"/> Section32oftheUSHAof1937(effective10/1/99)
3.Applicationstatus:(selectone) <input type="checkbox"/> Approved;includedinthePHA’sHomeownershipPlan/Program <input type="checkbox"/> Submitted,pendingapproval <input type="checkbox"/> Plannedapplication
4.DateHomeownershipPlan/Programapproved,submitted,orplannedforsubmission: (DD/MM/YYYY)
5. Numberofunitsaffected: 6.Coverageofaction:(selectone) <input type="checkbox"/> Partofthedevelopment <input type="checkbox"/> Totaldevelopment

## 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 streamlined submission due to high performer status. **High performing PHAs** may skip to component 12.)

2. Program Description: N/A

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** – Not required – High Performer

[24CFR Part 903.79(1)]

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

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

1. Cooperative agreements:

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

If yes, what was the date that agreement was signed? 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 programsto eligible families
- Jointly administer programs
- Partner to administer a HUD Welfare -to-Work voucher program
- Joint administration of other demonstration program
- Other (describe)

**B. Services and programs offered to residents and participants** – N/A

**(1) General**

a. Self -Sufficiency Policies

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

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



**C. Welfare Benefit Reductions -N/A**

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.PHASafetyandCrimePreventionMeasures**

[24CFRPart903.79(m)]

ExemptionsfromComponent13:HighperformingandsmallPHAsnotparticipatinginPHDEPand  
Section8OnlyPHAsmayskiptoc omponent15.HighPerformingandsmallPHAsthatareparticipating  
inPHDEPandaesubmittingaPHDEPPlanwiththisPHAPlanmayskiptosub -componentD.

#### **A.Needformeasurestoensurethesafetyofpublichousingresidents -N/A**

1.Describethene edformeasurestoensurethesafetyofpublichousingresidents(select allthatapply)

- Highincidenceofviolentand/or drug -relatedcrimeinsomeorallofthePHA's developments
- Highincidenceofviolentand/or drug -relatedcrimeintheareassurroundingor adjacenttothePHA'sdevelopments
- Residentsfearfulfortheirsafetyand/orthesafetyoftheirchildren
- Observedlower -levelcrime,vandalismand/orgraffiti
- Peopleonwaitinglistunwillingtomoveintooneormoredevelopmentsdueto perceivedand/oractuallevelsofviolentand/or drug -relatedcrime
- Other(describellow)

2.WhatinformationordatadidthePHAusedtodeterminetheneed forPHAactionsto improvesafetyofresidents(selectallthatapply).

- Safetyandsecuritysurveyofresidents
- Analysisofcrimestatisticovertimeforcrimescommitted“inandaround” publichousingauthority
- Analysisofcosttrendsovertimeforrepairofvandalismandremovalofgraffiti
- Residentreports
- PHAemployeereports
- Policereports
- Demonstrable,quantifiablesuccesswithpreviousorongoinganticrime/antidrug programs
- Other(describellow)

3.Whichdevelopmentsaremostaffected?(listbelow)

#### **B.CrimeandDrugPreventionactivitiesthePHAhasundertakenorplansto undertakeinthenextPHAfisc allyear- N/A**

1.ListthecrimepreventionactivitiesthePHAhasundertakenorplanstoundertake: (selectallthatapply)

- Contractingwithoutsideand/orresidentorganizationsforthe provisionofcrime and/or drug -preventionactivi ties
- CrimePreventionThroughEnvironmentalDesign
- Activitiestargetedtoat -riskyouth,adults,orseniors
- VolunteerResidentPatrol/BlockWatchersProgram

Other(describ below)

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

**C.Coordination between PHA and the police –N/A**

1.DescribethecoordinationbetweenthePHAandtheappropriatepoliceprecinctsfor carryingoutcrimepreventionmeasuresandactivities:(selectallthatapply)

- Policeinvolvementindevelopment,implementation,and/orongoingevaluation ofdrug -eliminationplan
- Policeprovidecrimedatatohousingauthoritystaffforanalysisandaction
- Policehaveestablishedaphysicalpresenceonhousingauthorityproperty(e.g., communitypolicingoffice,officerinresidence)
- Policeregularlytestifyinandotherwisesupportevictioncases
- PoliceregularlymeetwiththePHAmanagementandresidents
- AgreementbetweenPHAandlocallawenforcementagencyforprovisionof above-baselinelawenforcementservices
- Otheractivities(listbelow)

2.Whichdevelopmentsaremostaffected?(listbelow)

**D.AdditionalinformationasrequiredbyPHDEP/PHDEPPlan *Nolongerrequired***

PHAseligibleforFY2002PHDEPfundsmustprovideaPHDEPPlanmeetingspecifiedrequirements priortoreceiptofPHDEPfund.

Yes  No: IsthePHAeligibletoparticipateinthePHDEPinthefiscalyear coveredbythisPHAPlan?

Yes  No: HasthePHAincludedthePHDEPPlanforFY2002inthisPHAPlan?

Yes  No: ThisPHDEPPlanisanAttachment.(AttachmentFilename:

**14.RESERVEDFORPETPOLICY**

[24CFRPart903.79(n)]

*PetPolicy(Family) -tx027e02*

*PetPolicy(Elderly/Disabled) -tx027f02*

**15.CivilRightsCertifications**

[24CFRPart903.79(o)]

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

## **16. Fiscal Audit**

[24CFR Part 903.79(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? **N/A**  
If yes, how many unresolved findings remain? \_\_\_\_
5.  Yes  No: Have responses to any unresolved findings been submitted to HUD? **N/A**  
If not, when are they due (state below)?

## **17. PHA Asset Management** – *Not required High Performer*

[24CFR Part 903.79(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**

[24CFR Part 903.7 9(r)]

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

1.  Yes  No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?

2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)

Attached at Attachment (Filename)

Provided below:

- Request additional parking for senior citizen development

- More flowers for landscaping

- Update playground equipment

- Garbage disposals

- News sinks

- New countertops (partially completed)

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 there a 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 **N/A**

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 assistance) -based
- Representatives of all PHA resident and assisted family organizations
- Other (list)

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

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

1. Consolidated Plan jurisdiction: *State of Texas*

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)
  - *Reduce vacancies in public housing.*
  - *Expand the Voucher Program*
  - *Modernize units*
- Other: (list below)

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

- ◆ *To preserve and rehabilitate the City's existing housing stock primarily for extremely low, very low and low income families (0 -80 percent of median income).*
- ◆ *To expand economic opportunities in the community particularly for lower income residents.*

- ◆ *To continue to encourage and support non-profit organizations in seeking additional funding sources and assist them in obtaining such funding whenever possible.*

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

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

## Attachments

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

# PHA Plan for McKinney H.A. Table Library

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

**Annual Statement** *See attachment: tx027b02*  
**Capital Fund Program (CFP) Part I: Summary**

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

Original Annual Statement

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

**Annual Statement** *See attachment: tx027b02*  
**Capital Fund Program (CFP) Part II: Supporting Table**

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost

**AnnualStatement**     *Seeattachment:tx027b02*  
**CapitalFundProgram(CFP)PartIII:ImplementationSchedule**

Development Number/Name HA-WideActivities	AllFundsObligated (QuarterEndingDate)	AllFundsExpended (QuarterEndingDate)



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

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

Optional 5 -Year Action Plan Tables				
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development	
Description of Needed Physical Improvements or Management Improvements			Estimated Cost	Planned Start Date (HA Fiscal Year)
<i>See attachment: tx027c02</i>				
<b>Totalestimatedcostovernext5years</b>				

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



*Attachment:tx027a02*

**DE-CONCENTRATION AND INCOME TARGETING POLICY  
FOR THE  
HOUSING AUTHORITY OF THE CITY OF  
McKINNEY, TEXAS**

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**DE-CONCENTRATIONANDINCOMETARGETINGPOLICY**  
*(ofthePublicHousingAdmissionsandOccupancyPolicy)*

Sub-Title A, Section 513 of the Quality Housing and Work Responsibility Act of 1998 (QHWRA), establishes two interrelated requirements for implementation by Public Housing Authorities: (1) Economic De-concentration of public housing developments and(2)Income Targetingto assurethatfamiliesinthe“extremelylow”incomecategory areproportionatelyrepresentedinpublichousingandthatpocketsofpovertyarereduced or eliminated. In order to implement these new requirements the PHA must promote these provisions as policies and revise their Admission and Occupancy policies and procedures to comply.

Therefore, the Housing Authority of the City of McKinney, Texas (hereinafter referred to as PHA) hereby affirms its commitment to implementation of the two requirements by adopting the following policies:

A. Economic De-concentration:

Admission and Continued Occupancy Policies are revised to include the PHA’s policy of promoting economic de-concentration. Implementation of this program may require the PHA to determine the median income of residents in each development, determine the average income of residents in all developments, compute the Established Income Range (EIR), determine developments outside the EIR, and provide adequate explanations and/or policies as needed to promote economic de-concentration.

Implementation may include one or more of the following options:

- S Skipping families on the waiting list based on income;
- S Establishing preferences for working families;
- S Establish preferences for families in job training programs;
- S Establish preferences for families in education or training programs;
- S Marketing campaign geared toward targeting income groups for specific developments;
- S Additional supportive services;
- S Additional amenities for all units;
- S Flat rents for developments and unit sizes;
- S Different tenant rent percentages per development;
- S Different tenant rent percentages per bedroom size;
- S Saturday and evening office hours;
- S Security Deposit waivers;
- S Revised transfer policies;
- S Site-based waiting lists;
- S Mass Media advertising/Public service announcements; and
- S Giveaways.

## B. Income Targeting

As public housing dwelling units become available for occupancy, responsible PHA employees will offer units to applicants on the waiting list. In accordance with the Quality Housing and Work Responsibility Act of 1998, the PHA encourages occupancy of its developments by a broad range of families with incomes up to eighty percent (80%) of the median income for the jurisdiction in which the PHA operates. Depending on the availability of applicants with proper demographics, at a minimum, 40% of all new admissions to public housing **on an annual basis** may be families with incomes at or below thirty percent (30%), (extremely low -income) of the area median income. The offer of assistance will be made without discrimination because of race, color, religion, sex, national origin, age, handicap or familial status.

In order to implement the income targeting program, the following policy is adopted:

- < The PHA may select, based on date and time of application and preferences, two (2) families in the extremely low -income category and two (2) families from the lower/very low -income category alternately until the forty percent (40%) admission requirement of extremely low -income families is achieved (2plus2policy).
- < After the minimum level is reached, all selections may be made based solely on date, time and preferences. Any applicants passed over as a result of implementing this 2plus2 policy will retain their place on the waiting list and will be offered a unit in order of their placement on the waiting list.
- < To the maximum extent possible, the offers will also be made to effect the PHA's policy of economic de -concentration.
- < The PHA reserves the option, at any time, to reduce the targeting requirement for public housing by no more than ten percent (10%), if it increases the target figure for its Section 8 program from the required level of seventy -five percent (75%) of annual new admissions to no more than eighty -five percent (85%) of its annual new admissions. (Optional for PHAs with both Section 8 and Public Housing programs)

**CAPITAL FUND PROGRAM TABLES START HERE**

Attachment: tx027b02

**Annual Statement/Performance and Evaluation Report**  
**Capital Funds Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary**

PHAName: <b>Housing Authority of the City of McKinney</b>	Grant Type and Number: Capital Fund Program No: <b>TX21P02750103</b> Replacement Housing Factor Grant No:	Federal FY of Grant: <b>2003</b>
--	---	-------------------------------------

Original Annual Statement  Reserved for Disasters/Emergencies  Revised Annual Statement/Revision Number \_\_\_\_\_  
**Performance and Evaluation Report for Program Year Ending** **Final Performance and Evaluation Report for Program Year Ending**

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-Capital Funds				
2	1406 Operations	0.00			
3	1408 Management Improvements	25,000.00			
4	1410 Administration	7,512.00			
5	1411 Audit	8,000.00			
6	1415 Liquidated Damages	0.00			
7	1430 Fees and Costs	3,500.00			
8	1440 Site Acquisition	0.00			
9	1450 Site Improvement	18,000.00			
10	1460 Dwelling Structures	21,000.00			
11	1465.1 Dwelling Equipment-Nonexpendable	11,200.00			
12	1470 Nondwelling Structures	226,500.00			
13	1475 Nondwelling Equipment	3,050.00			
14	1485 Demolition	0.00			
15	1490 Replacement Reserve	0.00			
16	1492 Moving to Work Demonstration	0.00			
17	1495.1 Relocation Costs	0.00			
18	1499 Development Activities	0.00			
19	1501 Collateralization or Debt Service	0.00			
20	1502 Contingency	0.00			
21	<b>Amount of Annual Grant (sums of lines 2-20)</b>	<b>\$323,762.00</b>			
22	Amount of line 21 Related to LBP Activities	0.00			
23	Amount of Line 21 Related to Section 504 Compliance	0.00			
24	Amount of Line 21 Related to Security-Soft Costs	0.00			
25	Amount of Line 21 Related to Security-Hard Costs	0.00			
26	Amount of Line 21 Related to Energy Conservation Measures	0.00			













**CapitalFundsProgramFiveYearActionPlan  
PartII:SupportingPages--WorkActivities**

Activities for Year1	ActivitiesforYear:4 FFYGrant:2006 PHAFY:2006			ActivitiesforYear:4 FFYGrant:2006 PHAFY:2006		
	Development Name/Number	MajorWork Categories	EstimatedCost	Development Name/Number	MajorWork Categories	
See	TX027	<b>SitelImprovement:</b>		TX027	<b>ManagementImprovements:</b>	
	HA-Wide	Improvementstosite	18,000.00	HA-Wide	Purchasesoftwareforcomputers	
		<b>Subtotal</b>	<b>18,000.00</b>		Providefor5-YearPlanConsulting	
					ProvideTrainingforExecutiveDirector&Staff	
		<b>DwellingStructures:</b>			<b>Subtotal</b>	
Annual		LaborandmaterialforHVACindwellingunits	21,000.00			
		<b>Subtotal</b>	<b>21,000.00</b>		<b>Administration:</b>	
					Part-timehelpduringCFP,includingsnon-technical	
		<b>ComprehensiveMOD: (appr.26units)</b>			<b>Sundry</b>	
		Replacecabinets,installdishwashers,	185,500.00		<b>Subtotal</b>	
Statement		garbagedisposals,replacedeteriorated				
		bathubs,addvanity,replacerottenfloors.			<b>Audit:AuditFees</b>	
		<b>Subtotal1460</b>	<b>206,500.00</b>		<b>Subtotal</b>	
					<b>Fees&amp;Costs:</b>	
					On-siteInspectoromonitorworkingprogress	
					Architect/engineersservicestodevelopdrawings&	
			-		specifications,carryoutbidprocurement,administer	
					contract&makeon-siteobservationofworkingprogress.	
					<b>Subtotal</b>	
					<b>DwellingEquipment:</b>	
					Purchaserefrigerators@\$500ea.	
					Purchaseranges@\$310ea.	
					<b>Subtotal</b>	
					<b>Non-DwellingEquipment:</b>	
					Purchasecomputers	
					<b>Subtotal</b>	
		<b>Sub-TotalCFPEstimatedCost</b>	<b>245,500.00</b>		<b>TOTALCFPESTIMATEDCOS</b>	



Housing Authority of the City of McKinney  
**Attachment: tx027d02**

- A. Substantial Deviation from the 5-Year Plan:
- Any change to the Mission Statement;
  - 50% deletion from or addition to the goals and objectives as a whole; and
  - 50% or more decrease in the quantifiable measurement of any individual goal or objective.
- B. Significant Amendment or Modification to the Annual Plan:
- Any increase or decrease over 50% in the funds projected in the Financial Resource Statement and/or the Capital Fund Program Annual Statement;
  - Any change in a policy or procedure that requires a regulatory 30 day posting, **such as changes in the Admission's policy, changes affecting rent or the organization of the Waiting List;**
  - Any **change being submitted** to HUD that requires a separate notification to residents, such as **changes in the** Hope VI, Public Housing Conversion, Demolition/Disposition, Designated Housing or **Public Housing** Homeownership programs; and
  - Any change **in policy or operation that is** inconsistent with the **applicable** Consolidated Plan.

Attachmenttx027e02  
**PETOWNSHIP**  
**(FAMILY)**  
**FOR**  
**THEHOUSINGAUTHORITYOFTHE**  
**CITYOFMCKINNEY,TEXAS**



## PET OWNERSHIP

### OVERVIEW

Section 526 of the Quality Housing and Work Responsibility Act of 1998 added a new Section 31 ("Pet Ownership in Public Housing") to the United States Housing Act of 1937. Section 31 establishes pet ownership requirements for residents of public housing other than Federally assisted rental housing for the elderly or persons with disabilities. In brief, this section states that: A resident of a dwelling unit in public housing may own 1) or more common household pets or have such pets present in the dwelling unit. Allowance of pet \_\_\_\_\_ is subject to reasonable requirements of the PHA.

The Housing Authority of the City of McKinney (herein referred to as PHA) will notify eligible new and current residents of their right to own pets subject to the PHA's rules and will provide them a copy of the PHA's Pet Ownership Rules. To obtain permission, pet owners must agree to abide by those Rules.

In consulting with residents currently living in the PHA's developments, the PHA will notify all such residents that:

- A. all residents are permitted to own and keep common domesticated household pets, such as a cat, dog, bird, and fish, in their dwelling units, in accordance with PHA pet ownership rules;
- B. a non-refundable nominal pet fee of \$300.00 will be charged and is intended to cover the reasonable operating costs to the development directly attributable to a pet or pets in the unit (i.e., fumigation of a unit). A refundable pet deposit of \$150.00 will be assessed and is intended to cover additional costs not otherwise covered (i.e., damages \_\_\_\_\_ to the unit, yard, fumigation of a unit, etc.);
- C. animals that are used to assist the are excluded from the size weight, type and non-refundable fee requirements pertaining to ownership of service animals; however, they will be required to assure that proper licensing, inoculations, leash restraints, etc. are observed;
- D. residents may request a copy of the PHA's pet ownership rules or proposed amendments to the rules at any time; and,
- E. if the dwelling lease of a resident prohibits pet ownership, the \_\_\_\_\_ resident may request that the lease be amended to permit pet ownership, in accordance with the PHA's pet ownership rules shown below;
- F. Section 31 does not alter, in any way, the regulations applicable to Federally assisted housing for the elderly and persons with disabilities found at Section 227 of the Housing

(1/15/01)

andUrban -RuralRecoveryActof1983andlocatedin24CFRpart5,subpartC.

- G. **NewSection960.705of24CFRclarifiesthattheregulationsaddedinSection31do not apply to service animals that assist persons with disabilities. This exclusion applies to both service animals that reside in public housing and service animals that visit PHA developments. Nothing in this rule limits or impairs the rights of persons with disabilities, authorizes PHAs to limit or impair the rights of persons with disabilities, oraffectsanyauthorityPHAsmayhavetoregulateserviceanimals thatassistpersonswithdisabilities.**

## HOUSING AUTHORITY OF THE CITY OF MCKINNEY

### PetOwnershipRulesforFamilies

1. Common household pet means a domesticated cat, dog, bird, gerbil, hamster, Guinea pig and fish in aquariums. Reptiles of any kind, with the exception of small turtles or lizards in a terrarium, as well as mice and rats are prohibited. These definitions do not include any wild animal, bird of prey, dangerous fish, snakes, spiders or other insects, or any farm animals.
2. Each household shall have only one pet (except fish or birds). The limit for birds is two (2).
3. The pet owners shall have only a small cat or dog. The animal's weight shall not exceed *twenty (20) pounds*. The animal's height shall not exceed *fifteen (15) inches*. Such limitations do not apply to a **service animal** used to assist a disabled resident.
4. Pet owners shall license their pets (if required by state or local law) yearly with the City of McKinney as required. The pet owner must show the PHA proof of rabies and distemper booster inoculations and licensing annually. The pet owner must also carry renter's liability or other form of liability insurance which covers household pets.
5. No pet owners shall keep a pet in violation of State or local health or humane laws or ordinances. Any failure of these pet ownership rules to contain other applicable State or local laws or ordinances does not relieve the pet owner of the responsibility for complying with such requirements.
6. The pet owners shall have his or her cat or dog spayed or neutered and shall pay the cost thereof. A veterinarian shall verify that the spaying or neutering has been accomplished. The pet owners shall house the pet inside the pet owner's dwelling unit. The pet owners shall keep a cat or dog on a leash and shall control the animal when it is taken out of the dwelling unit for any purpose. The owner of a bird(s) shall confine them to a cage at all times. No pet owners shall allow his or her pet to be unleashed or loose outside the pet owner's dwelling unit.
7. No pet shall be permitted in any common area except as necessary to directly enter and exit the building. This restriction is not applicable to service animals.
8. No pet (other than birds or fish) shall be permitted to remain in an apartment overnight while the resident is away.
9. Management shall furnish to the household a pet sticker if the pet is a dog or cat which must be displayed on the front entrance door of the unit.

10. Residents shall provide the PHA a color photograph of the pet(s).
11. All dogs and cats shall wear a collar at all times. Attached to the collar shall be an ID tag listing the pet owner's name and address.
12. Any resident having a dog or cat shall obtain some type of "scooper" to clean up after the pet outdoors. The resident is responsible for placing all waste in sealed plastic bags and disposing of such material in a trash container.
13. Resident is required to take whatever action necessary to insure that their pet does not bring any fleas or ticks into the building. This may include, but is not limited to, the use of flea collars and flea powder. The resident is responsible for the cost of flea/tick extermination.
14. No residents shall keep, raise, train, breed or maintain any pet of any kind at any location, either inside or outside the dwelling unit, for any commercial purpose.
15. No pet owners shall keep a vicious or intimidating pet on the premises (i.e. pit bulls or any other vicious or intimidating breeds). If the pet owner declines, delays or refuses to remove such a pet from the premises, the PHA shall do so, in order to safeguard the health and welfare of other residents.
16. No pet owners shall permit this or her pet to disturb, interfere or diminish the peaceful enjoyment of the pet owner's neighbors or other residents. The terms "disturb, interfere or diminish" shall include but not be limited to barking, howling, biting, scratching, chirping and other activities of a disturbing nature. If the pet owner declines, delays or refuses to remove the pet from the premises, the PHA shall do so.
17. The owner of a cat shall feed the animal at least once per day; provide a litter box inside the dwelling unit; clean the litter box at least every two (2) days; and take the animal to a veterinarian at least once per year. The pet owner shall not permit refuse from the litter box to accumulate or to become unsanitary or unsightly, and shall dispose of such droppings by placing them in a plastic bag in a designated trash container outside the building where the pet owner lives.
18. The owner of a dog shall feed the animal at least once per day; take the animal for a walk at least twice per day; remove the animal's droppings at least twice per day; and take the animal to a veterinarian at least once per year. The pet owner shall not permit dog droppings to accumulate or to become unsanitary or unsightly, and shall dispose of such droppings by placing them in a plastic bag in a designated trash container outside the building where the pet owner lives.
19. The pet owner shall take the precautions and measures necessary to eliminate pet odors within and around the dwelling unit, and shall maintain the dwelling unit in a sanitary

condition at all times, as determined by the PHA.

20. The pet owners shall keep the pet, dwelling unit, and surrounding areas free of fleas, ticks and/or other vermin.
21. No pet owners shall alter the dwelling unit or the surrounding premises to create a space, hole, container or enclosure for any pet.
22. Resident agrees that the PHA shall have the right to remove any pet should the pet become vicious, displays symptoms of severe illness or demonstrate other behavior that constitutes an immediate threat to the health or safety of the tenancy as a whole. If the PHA requests that the resident remove the pet from the premises and the resident refuses to do so, or if the PHA is unable to contact the resident to make the request, the PHA may take such actions as deemed necessary, e.g. placing the pet in a facility that will provide the pet with care and shelter at the expense of the pet owner for a period not to exceed thirty (30) days. PHA staff shall enter a dwelling unit where a pet has been left unattended for twenty-four (24) hours, remove the pet and transfer it to the proper local authorities, subject to any revisions of State or local law or ordinances in this regard. The PHA shall accept no responsibility for the pet under such circumstances.
23. Each pet owner shall pay a non-refundable pet fee of \$150.00 and a refundable pet deposit of \$150.00. There is no pet deposit for birds, gerbils, hamsters, guinea pigs or turtles. The pet fee/deposit is not part of the rent payable by the pet owner, and is in addition to any other financial obligation generally imposed on residents of the development where the pet owner lives. The PHA shall use the non-refundable pet fee only to pay reasonable expenses directly attributable to the presence of the pet in the development, including, but not limited to the cost of repairs and replacements to, and the fumigation of, the pet owner's dwelling unit. The refundable deposit will be used, if appropriate, to correct damage to the presence of the pet.
24. The refundable pet deposit will be placed in an escrow account and the PHA will refund the unused portion to the resident within thirty (30) days after the pet owner moves from the dwelling unit or no longer owns or keeps a pet in the dwelling unit.
25. Should State or local law require that the pet deposit be placed in an interest bearing account, the PHA will provide for such deposit and will account for all interest individually by pet owner family. Should the State or local law not specifically address the issue of pet deposit interest, the PHA shall determine payment or non-payment of interest based on State or local law with respect to rental security deposit requirements.
26. All residents are prohibited from feeding, housing or caring for stray animals or birds. Such actions shall constitute having a pet without permission of the PHA.
27. Each pet owner shall identify an alternate custodian for his or her pet. If the pet owner is ill or absent from the dwelling unit and unable to care for his or her pet, the alternate custodian shall assume responsibility for the care and keeping of the pet, including, if

necessary, the removal of the pet from PHA premises.

28. Should any pet housed in the PHA's facilities give birth to a litter, the residents shall remove from the premises all of said pets except one as soon as the baby's are able to survive on their own (a maximum of six (6) weeks).
29. Pet Violation Procedures: Resident agrees to comply with the following:
  - a. Notice of Pet Rule Violation: If the PHA determines on the basis of objective facts, supported by written statements, that a pet owner has violated a rule governing the keeping of pets, the PHA will serve a notice to the owner of pet rule violation. The notice of pet rule violation will be in writing and will:
    - (1) Contain a brief statement of the factual basis for the determination and the pet rule or rules alleged to be violated.
    - (2) State that the pet owner has ten (10) days from the effective date of service of the notice to correct the violation (including in appropriate circumstances, removal of the pet) or to make a written request for a meeting to discuss the violation.
    - (3) State that the pet owner is entitled to be accompanied by another person of his or her choice at the meeting.
    - (4) State that the pet owner's failure to correct the violation, to request a meeting, or to appear at a requested meeting may result in initiation of procedure to have the pet removed and/or terminate the pet owner's lease or both.
  - b. Pet Rule Violation Meeting: If the pet owner makes a request, within five (5) days of the notice of pet rule violation, for a meeting to discuss the alleged violation, the PHA will establish a mutually agreeable time and place for the meeting within fifteen (15) days from the effective date of service of the notice of pet rule violation. At the pet rule violation meeting, the pet owner and PHA shall discuss any alleged pet rule violation and attempt to correct it. The PHA, may as a result of the meeting, give the pet owner additional time to correct the violation.
  - c. Notice for Pet Removal: If the PHA determines that the pet owner has failed to correct the pet rule violation within the time permitted by Paragraph b. of this section (including any additional time permitted by the PHA), or if the parties are unable to resolve the problem, the PHA may serve a notice to the pet owner requiring the pet owner to remove the pet. The notice will be in writing and will:
    - (1) Contain a brief statement of the factual basis for the determination and the

pet rule or rule that has been violated.

- (2) State that the pet owner must remove the pet within ten (10) days of the effective date of the notice of pet removal (or the meeting, if notice is served at the meeting).
  - (3) State that failure to remove the pet may result in initiation of the procedures to have the pet removed or terminate the pet owner's lease or both.
- d. The procedure does not apply in cases where the pet in question presents an immediate threat to the health, safe, of others or if the pet is being treated in an inhuman manner. In such cases paragraph 24 shall apply.
30. The PHA will not be responsible for any pet which gets out of a unit when maintenance employees enter for the purpose of making repairs. The family is responsible for removing the pet when maintenance is scheduled or assuring that a responsible family member is present to control the pet.
31. If a resident, including a pet owner, breaches any of the rules set forth above, the PHA may revoke the pet permit and evict the resident or pet owner.

## **AGREEMENT FOR CARE OF PET**

In accordance with the Pet Policy of the Housing Authority of the City of McKinney and the Addendum to the Residential Dwelling Lease Agreement dated \_\_\_\_\_ between:

THEHOUSINGAUTHORITYOFTHECITYOFMCKINNEY  
1200N.TennesseeStreet  
McKinney,TX75069

AND,

\_\_\_\_\_ (Resident'sName)

\_\_\_\_\_ (Resident'sAddress)

Iherebyagreethatshould \_\_\_\_\_ becomeincapable  
ofcaringfor \_\_\_\_\_ a  
(NameofPet) (TypeofPet)

for any reason what soever, I will assume full responsibility for removal of the pet from the  
premisesandforthecareandwellbeingoftheanimal.

Further, the pet shall not be permitted to return to the premises until approval is given by the  
HousingAuthorityoftheCityofMcKinney.

AcopyoftheAddendumtotheResidentialDwellingLeaseAgreementisattached.

Signature

Swornandsubscribedbefore  
methis \_\_\_\_\_ dayof  
\_\_\_\_\_, \_\_\_\_\_.

NotaryofPublic

MyCommissionExpires:

**PETPOLICYADDENDUM**

Ihavereadandunderstandtheabovepetownershiprulesandagreetoabidebythem.

\_\_\_\_\_  
Resident'sSignature

PHAStaffmember'sSignature

Date

Date

TypeofAnimalandBreed

NameofPet

DescriptionofPet(color,size,weight,sex,etc.)

Thealternatecustodianformypetis:

Custodian'sfirst,middleandlastname;postofficebox;streetaddress;zipcode;areatelephone  
codeandtelepho nenum ber:

\_\_\_\_\_  
Resident'sSignature

Date

RefundableDamageDeposit

\_\_\_\_\_  
AmountPaid

Date

Non-refundableDamageDeposit

\_\_\_\_\_  
AmountPaid

Date

E:\2003\AuthorityPolicies \ConsortiumMembers \McKinney,TX \CurrentPolicies \updatedPetPolicyFamily1 -15pjm.wpd

### NOTICE

**Althoughwehavemadeourbestefforttocomplywithregulations,laws,andFederal/local  
policies the Nelrod Company does not offer advice on legal matters or render legal  
opinions. Werecommen dthatthispolicybereviewedbytheHousingAuthority'sgeneral  
counciland/orattorneypriortoapprovalbytheBoardofCommissioners.**

**The Nelrod Company is not responsible for any changes made to these policies by any  
partyotherthantheNelrodComp any.**

Attachmenttx027f02  
**PETOWNERSHIP**  
**(ELDERLY/DISABLEDRESIDENTS)**  
**FOR**  
**THEHOUSINGAUTHORITYOFTHE**  
**CITYOFMCKINNEY,TEXAS**



## **PET OWNERSHIP**

Housing Authority residents who reside in developments specifically designated for elderly and/or disabled are permitted to own and keep pets in their dwelling units. The Housing Authority of the City of McKinney (herein referred to as PHA) will notify eligible new and current residents of that right and provide them copies of the PHA's Pet Ownership Rules. To obtain permission, pet owners must agree to abide by those Rules.

In consulting with residents currently living in the PHA's developments for the elderly or disabled, the PHA will notify all such residents that:

- A. elderly or disabled residents are permitted to own and keep common domesticated household pets, such as a cat, dog, bird, and fish, in their dwelling units, in accordance with PHA pet ownership rules;
- B. animals that are used to assist the are excluded from the size, weight, and type requirements pertaining to ownership of service animals; however, they will be required to assure that proper licensing, inoculations, leash restraints, etc. in accordance with State or local law are observed
- C. residents may request a copy of the PHA's pet ownership rules or proposed amendments to the rules at any time; and,
- D. if the dwelling lease of an elderly or disabled resident prohibits pet ownership, the resident may request that the lease be amended to permit pet ownership, in accordance with the PHA's pet ownership rules shown below.

## HOUSING AUTHORITY OF THE CITY OF MCKINNEY

### Pet Ownership Rules for Elderly/Disabled Residents

1. Common household pet means a domesticated cat, dog, bird, gerbil, hamster, Guinea pig and fish in aquariums. Reptiles of any kind, with the exception of small turtles in a terrarium, as well as mice and rats are prohibited. These definitions do not include any wild animal, bird of prey, dangerous fish, snakes, spiders or other insects, or any farm animals.
2. Each household shall have only one pet (except fish or birds). The limit for birds is two (2).
3. The pet owners shall have only a small cat or dog. The animal's weight shall not exceed *twenty (20) pounds*. The animal's height shall not exceed *fifteen (15) inches*. Such limitations do not apply to a *service animal* used to assist a disabled resident.
4. Pet owners shall license their pets (if required by state or local law) yearly with the City of McKinney, Texas. The pet owner must show the PHA proof of rabies and distemper booster inoculations and licensing annually. The pet owner must also carry renter's liability or other form of liability insurance which covers household pets. Such insurance shall be in force at all times, with proof of same provided at each recertification or at such other times as the PHA may request.
5. No pet owners shall keep a pet in violation of State or local health or humane laws or ordinances. Any failure of these pet ownership rules to contain other applicable State or local laws or ordinances does not relieve the pet owner of the responsibility for complying with such requirements.
6. The pet owners shall have his or her cat or dog spayed or neutered and shall pay the cost thereof. A veterinarian shall verify that the spaying or neutering has been accomplished. If the animal is less than six (6) months old, resident must agree to have the appropriate procedures performed when the animal reaches the age of six (6) months. Exceptions to this requirement shall be granted only upon certification from a veterinarian that permanent harm may result from this procedure due to the pet's age or illness.
7. All cats shall be declawed. Proof of compliance shall be furnished to management.
8. The pet owners shall house the pet inside the pet owner's dwelling unit. The pet owner shall keep a cat or dog on a leash and shall control the animal when it is taken out of the dwelling unit for any purpose. The owner of a bird(s) shall confine them to a cage at all times. No pet owners shall allow his or her pet to be unleashed or loose outside the pet

owner'sdwellingunit.

9. Nopetshall bepermittedinanycommonareaexceptasnecessarytodirectlyenterand exitthebuilding.Thisrestrictionisnotapplicabletoserviceanimals.
10. Nopet(otherthanbirdsorfish)shallbepermittedtoremaininapartmentovernight whiletheresidentisaway.
11. Managementshallfurnishtothehouseholdapetstickerifthepetisadogorcatwhich mustbedisplayedonthefrontentrancedooroftheunit.
12. ResidentshallprovidethePHAacolorphotographofthepet(s).
13. Alldogsandcatsshallwearacollaratalltimes.AttachedtothecollarshallbeanIDtag listingthepetowner'snameandaddress.
14. Anyresidenthavingadogorcatshallobtainssometypeof"scooper"tocleanupafterthe petoutdoors.Theresidentisresponsibleforplacingallwasteinsealedplasticbagsand disposingofsuchmaterialinatrashcontainer.
15. Residentisrequiredtotakewhateveractionnecessarytoinsurethattheirpetdoesnot bringanyfleasorticksintothebuilding.This mayinclude,butisnotlimitedto,theuse offleacollarsandflea powder.Theresidentisresponsibleforthecostofflea/tick extermination.
16. Noresidentshallkeep,raise,train,breedormaintainanypetofanykindatanylocation, eitherinsideoroutsidethedwellingunit,foranycommercialpurpose.
17. Nopetownershallkeepaviciousorintimidatingpetonthepremises(i.e.pitbullsorany otherviciousorintimidatingbreeds).Ifthepetownerdeclines,delayesorrefusesto removethepetfromthepremises,thePHAshalldosoinordertosafeguardthehealth andwelfareofotherresidents.
18. Nopetownershallpermithisorherpettodisturb,interfereordiminishtepeaceful enjoymentofthepetowner'sneighborsorotherresidents.Therms"disturb,interfere ordiminish"shallincludebutnotbelimitedto barking,howling,biting,scratching, chirpingandotheractivitiesofadisturbingnature.Ifthepetownerdeclines,delayesor refusstoremovethepetfromthepremises,the PHAshalldosoinordertosafeguardthehealth andwelfareofotherresidents.
19. Theownerofacatshallfeedtheanimalatleastonceperday;providelitterboxinside thedwellingunit;cleanthelitterboxatleasteverytwo(2)days;andtaketheanimaltoa veterinarianatleastonceperyear.Thepetownershallnotpermitrefusefromthelitter boxtoaccumulateortobecomeunsanitaryorunsightly,andshalldisposeofsuch droppingsbyplacingtheminasackinadesignatedtrashcontaineroutsidethebuilding

where the pet owner lives.

20. The owner of a dog shall feed the animal at least once per day; take the animal for a walk at least twice per day; remove the animal's droppings at least twice per day; and take the animal to a veterinarian at least once per year. The pet owners shall not permit dog droppings to accumulate or to become unsanitary or unsightly, and shall dispose of such droppings by placing them in a plastic tie sack in a designated trash container outside the building where the pet owner lives.
21. The pet owners shall take the precautions and measures necessary to eliminate pet odors within and around the dwelling unit, and shall maintain the dwelling unit in a sanitary condition at all times, as determined by the PHA.
22. No pet owners shall alter the dwelling unit or the surrounding premises to create a space, hole, container or enclosure for a pet.
23. Resident agrees that the PHA shall have the right to remove any pet should the pet become vicious, displays symptoms of severe illness or demonstrate other behavior that constitutes an immediate threat to the health or safety of the tenancy as a whole. If the PHA requests that the resident remove the pet from the premises and the resident refuses to do so, or if the PHA is unable to contact the resident to make the request, the PHA may take such actions as deemed necessary, e.g. placing the pet in a facility that will provide the pet with care and shelter at the expense of the pet owner for a period not to exceed thirty (30) days. PHA staff shall enter a dwelling unit where a pet has been left unattended for twenty-four (24) hours, remove the pet and transfer it to the proper local authorities, subject to any provisions of State or local law or ordinances in this regard. The PHA shall accept no responsibility for the pet under such circumstances.
24. Each pet owner shall pay a refundable pet deposit of \$150.00. There is no pet deposit for fish, birds, gerbils, hamsters, guinea pigs or turtles. The pet deposit is not part of the rent payable by the pet owner, and is in addition to any other financial obligation generally imposed on residents of the development where the pet owner lives. The PHA shall use the pet deposit only to pay reasonable expenses directly attributable to the presence of the pet in the development, including, but not limited to the cost of repairs and replacements to, and the fumigation of, the pet owner's dwelling unit. refund the unused portion to the pet owner within thirty (30) days after the pet owner moves from the dwelling unit or no longer owns or keeps a pet in the dwelling unit.
25. Should State or local law require that the pet deposit be placed in an interest bearing account, the PHA will provide for such deposit and will account for all interest individually by pet owner family. Should the State or local law not specifically address the issue of pet deposit interest, the PHA shall determine payment or non-payment of interest based on State or local law with respect to rental security deposit requirements.

26. All residents, including the elderly and disabled, are prohibited from feeding, housing or caring for stray animals or birds. Such actions shall constitute having a pet without permission of the PHA.
27. Each pet owner shall identify an alternate custodian for his or her pet. If the pet owner is ill or absent from the dwelling unit and unable to care for his or her pet, the alternate custodian shall assume responsibility for the care and keeping of the pet, including, if necessary, the removal of the pet from PHA premises.
28. Should any pet housed in the PHA's facilities give birth to a litter, the residents shall remove from the premises all of said pets except one as soon as the baby's are able to survive on their own (a maximum of six (6) weeks).
29. The PHA will not be responsible for any pet which gets out of a unit when maintenance employees enter for the purpose of making repairs. The family is responsible for removing the pet when maintenance is scheduled or assuring that a responsible family member is present to control the pet.
30. If a resident, including a pet owner, breaches any of the rules set forth above, the PHA may revoke the pet permit and evict the resident or pet owner.
31. If the pet's health is threatened because of a resident's inability to care for the pet due to illness, absence from the unit, or because of mistreatment of the pet, the PHA will notify the responsible person listed in the Pet Policy Addendum. If the individual is either unwilling or unable to care for the pet, or if the PHA is unable to contact the responsible part, the PHA will place the pet in a shelter for a maximum of thirty (30) days. If no responsible party is found, state or local authorities will be contacted.
32. The residents shall be responsible for arranging for burial or other disposal, off the premises, of pets in the event of the death of the pet.
33. The resident agrees to assume all personal financial responsibility for damage to any personal or PHA property caused by the pet and assumes personal responsibility for personal injury to any party caused by the pet.
34. Pet Violation Procedures: Resident agrees to comply with the following:
  - a. Notice of Pet Rule Violation: If the PHA determines on the basis of objective facts, supported by written statements, that a pet owner has violated a rule governing the keeping of pets, the PHA will serve a notice to the owner of pet rule violation. The notice of pet rule violation will be in writing and will:
    1. Contain a brief statement of the actual basis for the determination and the pet rule or rules alleged to be violated.

2. State that the pet owner has ten (10) days from the effective date of service of the notice to correct the violation (including in appropriate circumstances, removal of the pet) or to make a written request for a meeting to discuss the violation.
  3. State that the pet owner is entitled to be accompanied by another person of his or her choice at the meeting.
  4. State that the pet owner's failure to correct the violation, to request a meeting, or to appear at a requested meeting may result in initiation of procedures to have the pet removed and/or terminate the pet owner's lease or both.
- b. **Pet Rule Violation Meeting:** If the pet owner makes a request, within five (5) days of the notice of pet rule violation, for a meeting to discuss the alleged violation, the PHA will establish a mutually agreeable time and place for the meeting within fifteen (15) days from the effective date of service of the notice of pet rule violation. At the pet rule violation meeting, the pet owner and PHA shall discuss any alleged pet rule violation and attempt to correct it. The PHA, may as a result of the meeting, give the pet owner additional time to correct the violation.
- c. **Notice for Pet Removal:** If the PHA determines that the pet owner has failed to correct the pet rule violation within the time permitted by Paragraph b. of this section (including any additional time permitted by the PHA), or if the parties are unable to resolve the problem, the PHA may serve a notice to the pet owner requiring the pet owner to remove the pet. The notice will be in writing and will:
1. Contain a brief statement of the factual basis for the determination and the pet rule or rule that has been violated.
  2. State that the pet owner must remove the pet within ten (10) days of the effective date of the notice of pet removal (or the meeting, if notice is served at the meeting).
  3. State that failure to remove the pet may result in initiation of the procedures to have the pet removed or terminate the pet owner's lease or both.
- d. The procedure does not apply in cases where the pet in question presents an immediate threat to the health, safe, of others or if the pet is being treated in an inhuman manner. In such cases paragraph 24 shall apply.

**AGREEMENT FOR CARE OF PET**

In accordance with the Pet Policy of the Housing Authority of the City of McKinney and the Addendum to the Residential Dwelling Lease Agreement dated \_\_\_\_\_ between:

THE HOUSING AUTHORITY OF THE CITY OF MCKINNEY  
1200 N. Tennessee Street  
McKinney, TX 75069

AND,

\_\_\_\_\_ (Resident's Name)

\_\_\_\_\_ (Resident's Address)

I hereby agree that should \_\_\_\_\_ become incapable of caring for \_\_\_\_\_ a \_\_\_\_\_ (Name of Pet) \_\_\_\_\_ (Type of Pet)

for any reason whatsoever, I will assume full responsibility for removal of the pet from the premises and for the care and well-being of the animal.

Further, the pet shall not be permitted to return to the premises until approval is given by the Housing Authority of the City of McKinney.

A copy of the Addendum to the Residential Dwelling Lease Agreement is attached.

Signature

Sworn and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

Notary of Public

My Commission Expires:

### PETPOLICYADDENDUM

Ihavereadandunderstandtheabovepetownershiprulesandagreetoabidebythem.

\_\_\_\_\_  
Resident'sSignature PHAStaffmember'sSign ature

\_\_\_\_\_  
Date Date

TypeofAnimalandBreed

NameofPet

DescriptionofPet(color,size,weight,sex,etc.)

Thealternatecustodianformypetis:

Custodian'sfirst,middleandlastname;postofficebox;streetad dress;zipcode;areatelephone  
codeandtelephonenumber:

\_\_\_\_\_  
Resident'sSignature Date

RefundableDamageDeposit \_\_\_\_\_  
AmountPaid Date

Non-refundableDamageDeposit \_\_\_\_\_  
AmountPaid Date

## **NOTICE**

**Although we have made our best effort to comply with regulations, laws, and Federal/local policies the Nelrod Company does not offer advice on legal matters or render legal opinions. We recommend that this policy be reviewed by the Housing Authority's general council and/or attorney prior to approval by the Board of Commissioners.**

**The Nelrod Company is not responsible for any changes made to these policies by any party other than the Nelrod Company.**

# Housing Authority of the City of McKinney

## Required Attachment tx027g02: Resident Member on the PHA Governing Board

1.  Yes  No: Does the PHA governing board include at least one member who is directly assisted by the PHA this year? (if no, skip to #2)

A. Name of resident member(s) on the governing board: **Edna Rascoe**

B. How was the resident board member selected: (select one)?

Elected

Appointed

C. The term of appointment is (include the date term expires): **10/1/01-10/01/03**

2. A. If the PHA governing board does not have at least one member who is directly assisted by the PHA, why not? **N/A**

the PHA is located in a State that requires the members of a governing board to be salaried and serve on a full-time basis

the PHA has less than 300 public housing units, has provided reasonable notice to the resident advisory board of the opportunity to serve on the governing board, and has not been notified by any resident of their interest to participate in the Board.

Other (explain):

B. Date of next term expiration of a governing board member: **10/2003**

C. Name and title of appointing official(s) for governing board (indicate appointing official for the next position):

**Don Dozier, Mayor**

## **Housing Authority of the City of McKinney**

### **Required Attachment *tx027h02*: Membership of the Resident Advisory Board or Boards**

List members of the Resident Advisory Board or Boards: (If the list would be unreasonably long, list organizations represented or otherwise provide a description sufficient to identify how members are chosen.)

Connie Cosby

Donny Hernandez

Margaret May

Michael Morehead

Gloria Hernandez

Jose Garcia

Balsa Garcia

Oscar Flores

Amanda Flathers

Amanda Bunch

Housing Authority of the City of McKinney  
*Attachment:tx027i02*

**Summary of Policy or Program Changes for the Upcoming Year**

In this section, briefly describe changes in policies or programs discussed in last year's PHA Plan that are not covered in other sections of this Update.

*Revised the following:*

- *Deconcentration and Income Targeting Policy*
- *Substantial Deviation and Significant Amendment or Modification definition*

## **Housing Authority of the City of McKinney**

### **Section 8 Homeownership Program Capacity Statement** Attachment tx027j02

The Housing Authority of the City of McKinney demonstrates its capacity to administer the Section 8 Homeownership program has the following policies are adopted:

1. A minimum down payment of 3% is required. At least 1% must come for the family's resources.
2. Financing for purchase of a home will be provided, insured or guaranteed by the state or Federal government; comply with secondary mortgage market underwriting requirements; or comply with generally accepted private sector underwriting standards.

Housing Authority of the City of McKinney  
**Attachment: tx027k02**

**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:

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

Housing Authority of the City of McKinney  
***Attachment: tx027102***

**Agency Plan Component 10 (B) Voluntary Conversion Initial Assessments**

A. How many of the PHA's developments are subject to the Required Initial Assessments?

- All public housing developments are subject to the required initial assessment.

Merritt Homes  
Lloyd Owens  
Cockrell Homes  
Newsome Homes

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)?

- No developments are exempt.

C. How many Assessments were conducted for the PHA's covered developments?

- One assessment was conducted.

D. Identify PHA developments that may be appropriate for conversion based on the Required Initial Assessments:

- The PHA has determined that conversion is not appropriate for any developments at this time.

E. If the PHA has not completed the Required Initial Assessment, describe the status of these assessments.

N/A

**CAPITAL FUND PROGRAM TABLES START HERE**

Attachment: tx027m02

**Annual Statement/Performance and Evaluation Report**  
**Capital Funds Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary**

PHAName: <b>Housing Authority of the City of McKinney</b>	Grant Type and Number: Capital Fund Program No: <b>TX21P02750100</b> Replacement Housing Factor Grant No:	Federal FY of Grant: <b>2000</b>
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Original Annual Statement  Reserved for Disasters/Emergencies  Revised Annual Statement/Revision Number 1  
 Performance and Evaluation Report for Program Year Ending 12/31/02 Final Performance and Evaluation Report for Program Year Ending 12/31/02

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-Capital Funds				
2	1406 Operations				
3	1408 Management Improvements	14,188.00	14,188.00	14,188.00	14,188.00
4	1410 Administration	15,072.00	9,681.23	9,681.23	9,681.23
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	38,350.00	38,350.00	38,350.00	38,350.00
8	1440 Site Acquisition				
9	1450 Site Improvement	11,350.00	12,125.00	12,125.00	12,125.00
10	1460 Dwelling Structures	247,526.00	250,941.63	250,941.63	250,941.63
11	1465.1 Dwelling Equipment-Nonexpendable	7,100.00	9,400.14	9,400.14	9,400.14
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	1,100.00	0.00	0.00	0.00
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	<b>Amount of Annual Grant (sum of lines 2-20)</b>	<b>\$334,686.00</b>	<b>\$334,686.00</b>	<b>\$334,686.00</b>	<b>\$334,686.00</b>
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 and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part II: Supporting Page**

PHAName: <b>Housing Authority of the City of McKinney</b>		Grant Type and Number: Capital Fund Program No: <b>TX21P02750100</b> Replacement Housing Factor Grant No:						Federal FY of Grant: <b>2000</b>
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	Training for Executive Director and staff to include Occupancy Training	1408		12,188.00	12,188.00	12,188.00	12,188.00	Complete
	Computer Software	1408		2,000.00	2,000.00	2,000.00	2,000.00	Complete
	Part-time help, including non-technical	1410		12,831.00	9,681.23	9,681.23	9,681.23	Complete
	Sundry	1410		2,241.00	0.00	0.00	0.00	
	On-site inspector	1430		7,300.00	7,300.00	7,300.00	7,300.00	Complete
	Reproduction costs	1430		2,500.00	2,500.00	2,500.00	2,500.00	Complete
	Architect/Engineer to develop drawings specifications, carry out bid procurement administer contract & make on-site observation of work in progress.	1430		23,550.00	23,550.00	23,550.00	23,550.00	Complete
	Agency Plan Update, Consultant fees, consortia	1430		5,000.00	5,000.00	5,000.00	5,000.00	Complete
	Computer Hardware upgrade	1475		1,100.00	0.00	0.00	0.00	
TX027-HA-1	Landscaping	1450		6,000.00	6,000.00	6,000.00	6,000.00	Complete
Merritt Homes	Redesign Building Entrances	1460		175,000.00	178,415.63	178,415.63	178,415.63	Complete
TX027-HA-2	Landscaping	1450		5,350.00	6,125.00	6,125.00	6,125.00	Complete
Lloyd Owens	Redesign Building Entrances	1460		57,450.00	57,450.00	57,450.00	57,450.00	Complete
	Paint Interior	1460	14 units	15,076.00	15,076.00	15,076.00	15,076.00	Complete
	Ranges	1465		5,500.00	6,650.14	6,650.14	6,650.14	Complete
	Refrigerators	1465		1,600.00	2,750.00	2,750.00	2,750.00	Complete
			<b>TOTAL</b>	<b>\$334,686.00</b>	<b>\$334,686.00</b>	<b>\$334,686.00</b>	<b>\$334,686.00</b>	<b>100% Complete</b>



**CAPITAL FUND PROGRAM TABLES START HERE**

Attachment: tx027n02

**Annual Statement/Performance and Evaluation Report**  
**Capital Funds Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary**

PHAName: <b>Housing Authority of the City of McKinney</b>	Grant Type and Number: Capital Fund Program No: <b>TX21P02750101</b> Replacement Housing Factor Grant No:	Federal FY of Grant: <b>2001</b>
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Original Annual Statement       Reserved for Disasters/Emergencies       Revised Annual Statement/Revision Number \_\_\_\_\_  
 Performance and Evaluation Report for Program Year Ending 12/31/02       Final Performance and Evaluation Report for Program Year Ending \_\_\_\_\_

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-Capital Funds				
2	1406 Operations	0.00		0.00	0.00
3	1408 Management Improvements	21,000.00		14,081.56	14,081.56
4	1410 Administration	6,000.00		332.50	332.50
5	1411 Audit	8,000.00		6,750.00	6,750.00
6	1415 Liquidated Damages	0.00		0.00	0.00
7	1430 Fees and Costs	10,000.00		189.00	189.00
8	1440 Site Acquisition	26,000.00		6,360.08	6,360.08
9	1450 Site Improvement	19,876.00		9,973.49	9,973.49
10	1460 Dwelling Structures	20,000.00		17,535.05	17,535.05
11	1465.1 Dwelling Equipment-Nonexpendable	16,200.00		3,333.00	3,333.00
12	1470 Nondwelling Structures	0.00		0.00	0.00
13	1475 Nondwelling Equipment	3,050.00		1,399.99	1,399.99
14	1485 Demolition	0.00		0.00	0.00
15	1490 Replacement Reserve	0.00		0.00	0.00
16	1492 Moving to Work Demonstration	0.00		0.00	0.00
17	1495.1 Relocation Costs	0.00		0.00	0.00
18	1499 Development Activities	210,000.00		210,000.00	210,000.00
19	1501 Collateralization or Debt Service	0.00		0.00	0.00
20	1502 Contingency	0.00		0.00	0.00
21	<b>Amount of Annual Grant (sum of lines 2-20)</b>	<b>\$340,126.00</b>		<b>\$269,954.67</b>	<b>\$269,954.67</b>
22	Amount of line 21 Related to LBP Activities	0.00		0.00	0.00
23	Amount of Line 21 Related to Section 504 Compliance	0.00		0.00	0.00
24	Amount of Line 21 Related to Security-Soft Costs	0.00		0.00	0.00
25	Amount of Line 21 Related to Security-Hard Costs	0.00		0.00	0.00
26	Amount of Line 21 Related to Energy Conservation Measures	0.00		0.00	0.00

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

**Part II: Supporting Pages**

PHAName: <b>Housing Authority of the City of McKinney</b>		Grant Type and Number: Capital Fund Program No: <b>TX21P02750101</b> Replacement Housing Factor Grant No:				Federal FY of Grant: <b>2001</b>		
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	
TX027-HA Wide	<b>Management Improvements:</b>							
	Purchases software for computers	1408		2,000.00		0.00	0.00	
	Provide for 5-Year Plan Consulting	1408		5,000.00		0.00	0.00	
	Provide Training for Executive Director/Staff	1408		14,000.00		0.00	0.00	
	<b>Subtotal</b>	<b>1408</b>		<b>21,000.00</b>		<b>14,081.56</b>	<b>14,081.56</b>	<b>67% Complete</b>
	<b>Administration:</b>							
	Part-time help during CFP, including non-	1410		4,000.00		0.00	0.00	
	technical			-		0.00	0.00	
	Sundry	1410		2,000.00		0.00	0.00	
	<b>Subtotal</b>	<b>1410</b>		<b>6,000.00</b>		<b>332.50</b>	<b>332.50</b>	<b>6% Complete</b>
	<b>Audit: Audit Fees</b>	1411		8,000.00		0.00	0.00	
	<b>Subtotal</b>	<b>1411</b>		<b>8,000.00</b>		<b>6,750.00</b>	<b>6,750.00</b>	<b>84% Complete</b>
	<b>Fees &amp; Costs:</b>							
	On-site inspector to monitor work in	1430		3,500.00		0.00	0.00	
	progress.			-		0.00	0.00	
	Architect/engineer to develop drawings &	1430		6,500.00		0.00	0.00	
	specifications, carry out bid			-		0.00	0.00	
	procurement, administer contract & make			-		0.00	0.00	
	on-site observation of work in progress.			-		0.00	0.00	
	<b>Subtotal</b>	<b>1430</b>		<b>10,000.00</b>		<b>189.00</b>	<b>189.00</b>	<b>2% Complete</b>
	<b>Dwelling Equipment:</b>							
	Purchase refrigerators @ \$500 ea.	1465	20	10,000.00		0.00	0.00	
	Purchase ranges @ \$310 ea.	1465	20	6,200.00		0.00	0.00	
	<b>Subtotal</b>	<b>1465</b>		<b>16,200.00</b>		<b>3,333.00</b>	<b>3,333.00</b>	<b>21% Complete</b>
	<b>Non-Dwelling Equipment:</b>							
	Purchase computers	1475		3,050.00		0.00	0.00	
	<b>Subtotal</b>	<b>1475</b>		<b>3,050.00</b>		<b>1,399.99</b>	<b>1,399.99</b>	<b>46% Complete</b>
			<b>TOTAL</b>	<b>64,250.00</b>		<b>26,086.05</b>	<b>26,086.05</b>	





**CAPITAL FUND PROGRAM TABLES START HERE**

Attachment: tx027o02

**Annual Statement/Performance and Evaluation Report**

**Capital Funds Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary**

PHAName: <b>Housing Authority of the City of McKinney</b>	Grant Type and Number: Capital Fund Program No: <b>TX21P02750102</b> Replacement Housing Factor Grant No:	Federal FY of Grant: <b>2002</b>
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Original Annual Statement     
  Reserved for Disasters/Emergencies     
  Revised Annual Statement/Revision Number \_\_\_\_\_  
 Performance and Evaluation Report for Program Year Ending 12/31/02     
  Final Performance and Evaluation Report for Program Year Ending \_\_\_\_\_

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-Capital Funds				
2	1406 Operations	0.00		0.00	0.00
3	1408 Management Improvements	25,000.00		0.00	0.00
4	1410 Administration	7,512.00		0.00	0.00
5	1411 Audit	8,000.00		0.00	0.00
6	1415 Liquidated Damages	0.00		0.00	0.00
7	1430 Fees and Costs	28,500.00		0.00	0.00
8	1440 Site Acquisition	0.00		0.00	0.00
9	1450 Site Improvement	18,000.00		0.00	0.00
10	1460 Dwelling Structures	21,000.00		0.00	0.00
11	1465.1 Dwelling Equipment-Nonexpendable	11,200.00		0.00	0.00
12	1470 Nondwelling Structures	201,500.00		0.00	0.00
13	1475 Nondwelling Equipment	3,050.00		0.00	0.00
14	1485 Demolition	0.00		0.00	0.00
15	1490 Replacement Reserve	0.00		0.00	0.00
16	1492 Moving to Work Demonstration	0.00		0.00	0.00
17	1495.1 Relocation Costs	0.00		0.00	0.00
18	1499 Development Activities	0.00		0.00	0.00
19	1501 Collateralization or Debt Service	0.00		0.00	0.00
20	1502 Contingency	0.00		0.00	0.00
21	<b>Amount of Annual Grant (sums of lines 2-20)</b>	<b>\$323,762.00</b>		<b>\$0.00</b>	<b>\$0.00</b>
22	Amount of line 21 Related to LBP Activities	0.00		0.00	0.00
23	Amount of Line 21 Related to Section 504 Compliance	0.00		0.00	0.00
24	Amount of Line 21 Related to Security-Soft Costs	0.00		0.00	0.00
25	Amount of Line 21 Related to Security-Hard Costs	0.00		0.00	0.00
26	Amount of Line 21 Related to Energy Conservation Measures	0.00		0.00	0.00

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

**Part II: Supporting Pages**

PHAName: <b>Housing Authority of the City of McKinney</b>		Grant Type and Number: Capital Fund Program No: <b>TX21P02750102</b> Replacement Housing Factor Grant No:				Federal FY of Grant: <b>2002</b>		
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	
TX027-HA Wide	<b>Management Improvements:</b>							
	Purchases of software for computers	1408		2,000.00		0.00	0.00	
	Provide for 5-Year Plan Consulting	1408		5,000.00		0.00	0.00	
	Provide Training for Executive Dir./Staff	1408		18,000.00		0.00	0.00	
	<b>Subtotal</b>	<b>1408</b>		<b>25,000.00</b>		<b>0.00</b>	<b>0.00</b>	
	<b>Administration:</b>							
	Part-time help during CFP, including non-technical	1410		5,512.00		0.00	0.00	
	Sundry	1410		2,000.00		0.00	0.00	
	<b>Subtotal</b>	<b>1410</b>		<b>7,512.00</b>		<b>0.00</b>	<b>0.00</b>	
	<b>Audit: Audit Fees</b>							
		1411		8,000.00		0.00	0.00	
	<b>Subtotal</b>	<b>1411</b>		<b>8,000.00</b>		<b>0.00</b>	<b>0.00</b>	
	<b>Fees &amp; Costs:</b>							
	On-site inspector to monitor work in progress.	1430		3,500.00		0.00	0.00	
	Architect/engineer to develop drawings & specifications, carry out bid procurement, administer contract & make on-site observation of work in progress.	1430		25,000.00		0.00	0.00	
	<b>Subtotal</b>	<b>1430</b>		<b>28,500.00</b>		<b>0.00</b>	<b>0.00</b>	
	<b>Dwelling Equipment:</b>							
	Purchase refrigerators @\$500 ea.	1465	10	5,000.00		0.00	0.00	
	Purchase ranges @\$310 ea.	1465	20	6,200.00		0.00	0.00	
	<b>Subtotal</b>	<b>1465</b>		<b>11,200.00</b>		<b>0.00</b>	<b>0.00</b>	
	<b>Non-Dwelling Equipment:</b>							
	Purchase computers	1475		3,050.00		0.00	0.00	
	<b>Subtotal</b>	<b>1475</b>		<b>3,050.00</b>		<b>0.00</b>	<b>0.00</b>	
			<b>TOTAL</b>	<b>83,262.00</b>		<b>0.00</b>	<b>0.00</b>	



