OMB Approval No: 2577-0226
(exp. 02/28/2006)

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

PHA Plans

5 Year Plan for Fiscal Years 2000 - 2004
Annual Plan for Fiscal Year 2004

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

PHA Plan
Agency Identification

PHA Name: Housing Authority of the City of Sarasota (HACS)

PHA Number: FL008

PHA Fiscal Year Beginning: (mm/yyyy) 04/2004

Public Access to Information

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

☒ Main administrative office of the PHA
☐ PHA development management offices
☐ PHA local offices

Display Locations For PHA Plans and Supporting Documents

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

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

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

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

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

A. Mission

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

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

☒ The PHA's mission is:

The mission of the Housing Authority of the City of Sarasota (HACS) is to create affordable, vibrant, safe, attractive and economically diverse communities that are free from discrimination, by providing quality housing options for eligible families through creative and professional service in partnership with the greater community.

B. Goals

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

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

☐ PHA Goal: Expand the supply of assisted housing
Objectives:
- ☐ Apply for additional rental vouchers:
- ☐ Reduce public housing vacancies:
- ☐ Leverage private or other public funds to create additional housing opportunities:
- ☐ Acquire or build units or developments
- ☐ Other (list below)

☐ PHA Goal: Improve the quality of assisted housing
Objectives:
- ☐ Improve public housing management: (PHAS score)

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- ☐ Improve voucher management: (SEMAP score)
- ☐ Increase customer satisfaction:
- ☐ Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections)
- ☐ Renovate or modernize public housing units:
- ☐ Demolish or dispose of obsolete public housing:
- ☐ Provide replacement public housing:
- ☐ Provide replacement vouchers:
- ☐ Other: (list below)

☐ PHA Goal: Increase assisted housing choices
Objectives:

- ☐ Provide voucher mobility counseling:
- ☐ Conduct outreach efforts to potential voucher landlords
- ☐ Increase voucher payment standards
- ☐ Implement voucher homeownership program:
- ☐ Implement public housing or other homeownership programs:
- ☐ Implement public housing site-based waiting lists:
- ☐ Convert public housing to vouchers:
- ☐ Other: (list below)

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

☐ PHA Goal: Provide an improved living environment
Objectives:

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

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

☐ PHA Goal: Promote self-sufficiency and asset development of assisted households
Objectives:

- ☐ Increase the number and percentage of employed persons in assisted families:
- ☐ Provide or attract supportive services to improve assistance recipients' employability:
- ☐ Provide or attract supportive services to increase independence for the elderly or families with disabilities.
- ☐ Other: (list below)

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

☐ PHA Goal: Ensure equal opportunity and affirmatively further fair housing
Objectives:

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

Other PHA Goals and Objectives: (list below)

Goals and Objectives

The Housing Authority of the City of Sarasota (HACS) has prepared this Agency Plan in compliance with Section 511 of the Quality Housing and Work Responsibility Act of 1998 and the ensuing HUD requirements.

We have adopted the following mission statement to guide the activities of HACS.

The mission of HACS is to create affordable, vibrant, safe, attractive and economically diverse communities that are free from discrimination, by providing quality housing options for eligible families through creative and professional service in partnership with the greater community.

We have also adopted the following goals and objectives for the next five years.

GOAL: Participate in ensuring an adequate supply of affordable housing in economically appreciating neighborhoods.

Objectives

- Apply for an additional 100 rental vouchers
- Reduce Public Housing vacancies to less than 3%

GOAL: Improve the quality of assisted housing

Objectives

- Improve Public Housing management and obtain PHAS High Performer status
- Improve voucher management and obtain SEMAP High Performer status

GOAL: Increase assisted housing choices

Objectives

- Conduct outreach efforts to potential voucher landlords and obtain 50 new landlords
- Develop and implement a homeownership program and enroll 25 families in the homeownership program

GOAL: Improve community quality of life and economic vitality

Objectives

- Implement measures to deconcentrate poverty by bringing higher income public households into lower income developments and through economic self sufficiency programs for existing residents
- Implement measures to promote income mixing by assuring access for lower income Section 8 families into higher income neighborhoods.
- Implement Public Housing security improvements and reduce crime to a level lower than that of the surrounding neighborhood
- Designate McCown Towers for particular resident groups (elderly, persons with disabilities)

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GOAL: Promote self-sufficiency of families and individuals

Objectives

- Increase collaborative partnerships for supportive services with five new organizations to improve employability and income
- Increase collaborative partnerships for increasing independence with five new organizations for the elderly or families with disabilities
- Establish collaborative partnership with Sarasota School Board for supportive services for Housing Authority children to achieve academic excellence

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 ensure accessible housing to persons with all variety of disabilities

Our Annual Plan is based on the premise that if we accomplish our goals and objectives we will be working towards the achievement of our mission.

The plans, statements, budget summary, policies, etc. set forth in the Annual Plan all lead towards the accomplishment of our goals and objectives. Taken as a whole, they outline a comprehensive approach towards our goals and objectives and are consistent with the Consolidated Plan. Here are just a few highlights of our Annual Plan:

- Use Capital Grant funds to address the long-term physical deficiencies of the developments
- Decrease deconcentrations of extremely low income public housing developments through economic uplift measures for the residents and recruitment of mixed incomes to the waiting list

- Increase the availability of housing for Section 8 participants through an increase in the payment standards and recruitment of new landlords
- Improve the overall management of the Housing Authority as demonstrated by improvements in the Public Housing Assessment System score

In summary, we are on course to improve the condition of affordable housing in HACS.

Annual PHA Plan
PHA Fiscal Year 2004
[24 CFR Part 903.7]

i. Annual Plan Type:
Select which type of Annual Plan the PHA will submit.

☒ **Standard Plan**

Streamlined Plan:

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

☐ **Troubled Agency Plan**

ii. Executive Summary of the Annual PHA Plan
[24 CFR Part 903.7 9 (r)]

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

EXECUTIVE SUMMARY

Progress in meeting Five Year Plan Mission and Goals

The Housing Authority of the City of Sarasota (HACS) continued to evidence consistent and marked progress in advancing its Mission Statement by continued focus and achievement of its specified goals.

HACS is achieving its goal to ensure an adequate supply of affordable housing by maintaining attention to this goal's defined objectives. HACS adopted a written policy (Resolution 03-17) to expand diversity of choice for HACS' Housing Choice Voucher (HCV) applicants outside areas of poverty and/or minority concentration. HACS has applied in the past and will apply for all future offerings for HCVs under the Fair Share Allocation of Incremental Vouchers Funding. HACS continues to achieve its goal of reducing public housing vacancies to less than 3% by maintaining an average occupancy rate of 98.6% authority-wide throughout the fiscal year.

HACS continues to strive to enhance the quality of assisted housing by focusing on its public housing management. HACS maintains its Standard Performer status while addressing HUD's Public Housing Assessment System (PHAS) indicators that need additional attention. Unfortunately, HUD-administered funding shortfalls and delays in distribution of eligible HUD funds earned have hampered HACS' progress in this fiscal year. HACS projects a Section 8 Management Assessment Program (SEMAP) performance score of 92.

HACS increased assisted housing choices by conducting outreach efforts to potential HCV landlords and added 80 new landlords to its Section 8 HCV Program this fiscal year. HACS has developed and implemented a homeownership program that currently enrolls 65 families as potential homebuyers. HACS has sold 5 units of its Rosemary Park, A Condominium, Phase I and anticipates to sell the remaining 7 units during the current fiscal year.

HACS improved the community quality of life and economic vitality by promoting its Family Self-Sufficiency (FSS) Program. HACS' FSS Program significantly exceeds its minimum enrollment requirement with 41 participants (an increase of 66% from the previous fiscal year) of which twelve (12) have established escrow accounts.

HACS has introduced new security improvements at the McCown Towers which included upgraded camera equipment and two additional camera installations. Also, HACS recorded a 58% decrease in calls for police service from the previous year period as an illustration of crime reduction.

HACS has exceeded its goal of five new organizations to improve employability and income as well as five new organizations to increase independence for the elderly and disabled through the efforts of HACS' Elderly/Disabled Service Coordinator within this fiscal year. In conjunction with HACS' Hope VI Revitalization initiative, HACS has partnered with Reliable Business Solutions, Jewish Family and Children's Services, Suncoast Workforce Board, Bethesda Outreach Ministries, Project Challenge, and Sarasota County Technical Institute (employability and income), and Coastal Behavioral Healthcare, Sarasota Memorial Healthcare System Community AIDS Network, Jewish Family and Children Services and Family Home Health Services (increasing independence) to mention a few.

To further its goal to ensure equal opportunity and fair housing, HACS has undertaken work projects to provide accessible accommodations to persons with disabilities. In this fiscal year, HACS has installed accessible bathrooms and parking at its Janie Poe housing development's community center; modified three (3) Orange Avenue housing development apartments to accommodate handicapped residents with handicapped parking; remodeled the Maintenance Department restrooms for handicapped accessibility; renovated public restrooms to be handicapped accessible, installed strobe light door bells in certain units, installed handicapped grab bars and toilet sets to accommodate resident needs and installed fire strobe lights in identified units at the McCown Towers elderly hi-rise; renovated four (4) apartments in the McCown Towers' Annex to handicapped accessible units and installed four (4) driveways for existing handicapped apartments in the Bertha Mitchell housing development .

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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

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Annual Plan

i. Executive Summary

ii. Table of Contents

1. Housing Needs
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3. Policies on Eligibility, Selection and Admissions
4. Rent Determination Policies
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6. Grievance Procedures
7. Capital Improvement Needs
8. Demolition and Disposition
9. Designation of Housing
10. Conversions of Public Housing
11. Homeownership
12. Community Service Programs
13. Crime and Safety
14. Pets (Inactive for January 1 PHAs)
15. Civil Rights Certifications (included with PHA Plan Certifications)
16. Audit
17. Asset Management
18. Other Information

Attachments

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

Required Attachments:

☒ Admissions Policy for Deconcentration

☒ FY 2004 Capital Fund Program Annual Statement (fl008a04)

☐ Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

Optional Attachments:

☒ PHA Management Organizational Chart (fl008b04)

☒ FY 2004 Capital Fund Program 5 Year Action Plan (fl008c04)

☐ Public Housing Drug Elimination Program (PHDEP) Plan
☐ Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text) Attached in PHA Plan Text
☐ Other (List below, providing each attachment name)

Supporting Documents Available for Review

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

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

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

List of Supporting Documents Available for Review		
Applicable & On Display	**Supporting Document**	**Applicable Plan Component**
	resident services grant) grant program reports	Service & Self-Sufficiency
	The most recent Public Housing Drug Elimination Program (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U. S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

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

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

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	1641	5	5	5	5	5	5
Income >30% but <=50% of AMI	1590	5	5	5	5	5	5
Income >50% but <80% of AMI	2341	4	4	4	4	4	4
Elderly	1499	4	4	4	4	4	4
Families with Disabilities	1723	5	5	5	5	5	5
Race/Ethnicity	1438	5	5	5	5	5	5
Race/Ethnicity	181	5	5	5	5	5	5
Race/Ethnicity							
Race/Ethnicity							

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

☒ Consolidated Plan of the Jurisdiction/s
Indicate year: 2000-2005
☒ U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") dataset
☐ American Housing Survey data
Indicate year:
☐ Other housing market study
Indicate year:
☐ Other sources: (list and indicate year of information)

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

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

Housing Needs of Families on the Waiting List PUBLIC HOUSING			
Waiting list type: (select one) ☐ Section 8 tenant-based assistance ☒ Public Housing ☐ Combined Section 8 and Public Housing ☐ Public Housing Site-Based or sub-jurisdictional waiting list (optional) If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	207		
Extremely low income <=30% AMI	170	82%	
Very low income (>30% but <=50% AMI)	32	15%	
Low income (>50% but <80% AMI)	5	3%	
Families with children	160		
Elderly families	22		

Housing Needs of Families on the Waiting List PUBLIC HOUSING			
Families with Disabilities	24		
Race/ethnicity Latino	27		
Race/ethnicity Black	126		
Race/ethnicity White	81		
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	92		
2 BR	55		
3 BR	44		
4 BR	13		
5 BR	3		
5+ BR			

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

If yes:

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

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

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

Housing Needs of Families on the Waiting List SECTION 8			
Waiting list type: (select one) ☒ Section 8 tenant-based assistance ☐ Public Housing ☐ Combined Section 8 and Public Housing ☐ Public Housing Site-Based or sub-jurisdictional waiting list (optional) If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	464		
Extremely low income <=30% AMI	338	73%	
Very low income	115	25%	

Housing Needs of Families on the Waiting List SECTION 8			
(>30% but <=50% AMI)			
Low income (>50% but <80% AMI)	11	2%	
Families with children	394		
Elderly families	37		
Families with Disabilities	28		
Race/ethnicity Latino	32		
Race/ethnicity Black	317		
Race/ethnicity White	146		
Race/ethnicity Asian	1		
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			

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

If yes:

How long has it been closed (# of months)? 12

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

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

C. Strategy for Addressing Needs

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

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

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

Strategy 2: Increase the number of affordable housing units by:
Select all that apply

- ☒ Apply for additional section 8 units should they become available
- ☐ Leverage affordable housing resources in the community through the creation of mixed - finance housing
- ☒ Pursue housing resources other than public housing or Section 8 tenant-based assistance.
- ☒ Other: (list below)
  Pursue housing resources through partnerships with for-profit and/or non-profit entities, which could include applying for project-based housing choice vouchers to enhance project feasibility.

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

Strategy 1: Target available assistance to families at or below 30 % of AMI
Select all that apply

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

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

Strategy 1: Target available assistance to families at or below 50% of AMI
Select all that apply

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

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:
Select all that apply

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

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:
Select all that apply

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

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

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

Select if applicable

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

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

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

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

(2) Reasons for Selecting Strategies

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

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

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

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

public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

Financial Resources: Planned Sources and Uses		
Sources	**Planned $**	**Planned Uses**
1. **Federal Grants (FY 2003 grants)**		
a) Public Housing Operating Fund	864,094.00	
b) Public Housing Capital Fund	679,762.00	
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	5,384,194.00	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	.00	
g) Resident Opportunity and Self-Sufficiency Grants	32,320.00	
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
Section 8 N/C Housing Assist.	290,283.00	
2. Prior Year Federal Grants (unobligated funds only) (list below)		
3. Public Housing Dwelling Rental Income	842,076.00	
Section 8 N/C Dwelling Rents	130,000.00	
4. Other income (list below)		
Misc. Income-Tenant Charges	55,000.00	
Interest Income	2,800.00	
4. Non-federal sources (list below)		
Trustee Investments	25,000.00	
Section 8 N/C Misc. Income	700.00	
Total resources	8,306,229.00	

form **HUD 50075** (03/2003)

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.7 9 (c)]

A. Public Housing

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

(1) Eligibility

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

☐ When families are within a certain number of being offered a unit: (state number)
☒ When families are within a certain time of being offered a unit: within 10 days
☐ Other: (describe)

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

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

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

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

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

(2)Waiting List Organization

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

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

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

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

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

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

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

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

4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?
☐ PHA main administrative office
☐ All PHA development management offices
☐ Management offices at developments with site-based waiting lists
☐ At the development to which they would like to apply
☐ Other (list below)

(3) Assignment

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

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

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

(4) Admissions Preferences

a. Income targeting:

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

b. Transfer policies:
In what circumstances will transfers take precedence over new admissions? (list below)

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

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

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

☐ Victims of reprisals or hate crimes
☐ Other preference(s) (list below)

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

Date and Time

Former Federal preferences:
3 Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
Victims of domestic violence
Substandard housing
Homelessness
High rent burden

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

4. Relationship of preferences to income targeting requirements:
☐ The PHA applies preferences within income tiers
☒ Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

(5) Occupancy

a. What reference materials can applicants and residents use to obtain information about the rules of occupancy of public housing (select all that apply)
☒ The PHA-resident lease
☒ The PHA's Admissions and (Continued) Occupancy policy
☒ PHA briefing seminars or written materials

☐ Other source (list)

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

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

(6) Deconcentration and Income Mixing

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

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

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

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

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

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

☐ Other (list policies and developments targeted below)

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

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

☐ Additional affirmative marketing

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

f. Based on the results of the required analysis, in which developments will the PHA make special efforts to attract or retain higher-income families? (select all that apply)
☒ Not applicable: results of analysis did not indicate a need for such efforts
☐ List (any applicable) developments below:

g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower-income families? (select all that apply)
☒ Not applicable: results of analysis did not indicate a need for such efforts
☐ List (any applicable) developments below:

B. Section 8

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

(1) Eligibility

a. What is the extent of screening conducted by the PHA? (select all that apply)
☒ Criminal or drug-related activity only to the extent required by law or regulation
☐ Criminal and drug-related activity, more extensively than required by law or regulation
☐ More general screening than criminal and drug-related activity (list factors below)
☒ Other (list below) Sexual Offender

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)

All applicant or current participant records are available at the landlord's request

(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:

Illness, immediate family death or extraordinary hardship

(4) Admissions Preferences

a. Income targeting

☐ Yes ☒ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the section 8 program to families at or below 30% of median area income?

b. Preferences

1. ☒ Yes ☐ No: Has the PHA established preferences for admission to section 8 tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent **(5) Special purpose section 8 assistance programs**)

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

Former Federal preferences

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

Other preferences (select all that apply)

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

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

Date and Time

Former Federal preferences

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

Other preferences (select all that apply)

- ☐ Working families and those unable to work because of age or disability

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

4. Among applicants on the waiting list with equal preference status, how are applicants selected? (select one)
☐ Date and time of application
☒ Drawing (lottery) or other random choice technique

5. If the PHA plans to employ preferences for "residents who live and/or work in the jurisdiction" (select one)
☒ This preference has previously been reviewed and approved by HUD
☐ The PHA requests approval for this preference through this PHA Plan

6. Relationship of preferences to income targeting requirements: (select one)
☐ The PHA applies preferences within income tiers
☒ Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

(5) Special Purpose Section 8 Assistance Programs

a. In which documents or other reference materials are the policies governing eligibility, selection, and admissions to any special-purpose section 8 program administered by the PHA contained? (select all that apply)
☐ The Section 8 Administrative Plan
☐ Briefing sessions and written materials
☐ Other (list below)

b. How does the PHA announce the availability of any special-purpose section 8 programs to the public?
☐ Through published notices
☐ Other (list below)

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

☐ $0
☐ $1-$25
☒ $26-$50

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

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

Public Housing Admissions & Occupancy Policy

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

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

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

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

☐ For the earned income of a previously unemployed household member
☐ For increases in earned income
☐ Fixed amount (other than general rent-setting policy)
If yes, state amount/s and circumstances below:

☐ Fixed percentage (other than general rent-setting policy)
If yes, state percentage/s and circumstances below:

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

e. Ceiling rents

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

☐ Yes for all developments
☐ Yes but only for some developments
☒ No

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

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

☐ Other (list below)

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

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

f. Rent re-determinations:

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

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

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

(2) Flat Rents

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

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

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 below100% of FMR
☐ 100% of FMR
☒ Above 100% but at or below 110% of FMR
☐ Above 110% of FMR (if HUD approved; describe circumstances below)

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

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

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

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

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

☒ Annually
☐ Other (list below)

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

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

Increase the diversity in housing opportunities for participants

(2) Minimum Rent

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

☐ $0
☐ $1-$25
☒ $26-$50

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

HACS has set the minimum rent at $50.00. However, if the family requests a hardship exemption and HACS grants that request, HACS will suspend the minimum rent for the family beginning the month following the approval date of the family's hardship request.

5. Operations and Management

[24 CFR Part 903.7 9 (e)]

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

A. PHA Management Structure

Describe the PHA's management structure and organization.

(select one)

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

☐ A brief description of the management structure and organization of the PHA follows:

B. HUD Programs Under PHA Management

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

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	524	100
Section 8 Vouchers	728	60
Section 8 Certificates	N/A	N/A
Section 8 Mod Rehab	N/A	N/A

Special Purpose Section 8 Certificates/Vouchers (list individually)	N/A	N/A
Public Housing Drug Elimination Program (PHDEP)	N/A	N/A
Other Federal Programs(list individually)	N/A	

C. Management and Maintenance Policies

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

(1) Public Housing Maintenance and Management:

Admissions & Continued Occupancy Policy
Blood Borne Diseases Policy
Capitalization Policy
Criminal Records Management Policy
Disposition Policy
Drug Free Workplace Policy
Equal Housing Opportunity Policy
Ethics Policy
Facilities Use Policy
Funds Transfer Policy
Grievance Policy
Hazardous Material Policy
Investment Policy
Maintenance Policy
Natural Disaster Policy
Pest Control Policy
Procurement Policy
Pet Policy
Community Service/Self Sufficiency Policy
Satellite Policy
Risk Management Policy

Code of Conduct
Records Retention

(2) Section 8 Management: (list below)

Administrative Plan

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

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

A. Public Housing

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

If yes, list additions to federal requirements below:

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

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

B. Section 8 Tenant-Based Assistance

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

If yes, list additions to federal requirements below:

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

☒ PHA main administrative office
☒ Other (list below)

Section 8 Department

7. Capital Improvement Needs

[24 CFR Part 903.7 9 (g)]

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

A. Capital Fund Activities

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

(1) Capital Fund Program Annual Statement

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

Select one:

☒ The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name) fl008a04

-or-

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

(2) Optional 5-Year Action Plan

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

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

b. If yes to question a, select one:

☒ The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state name) fl008a04

-or-

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

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

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

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

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

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

☒ Yes ☐ No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?
If yes, list development name/s below:
Janie Poe, The Courts, Orange Avenue, Bertha Mitchell

☒ Yes ☐ No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?
If yes, list developments or activities below:
Janie Poe, The Courts, Orange Avenue, Bertha Mitchell

☒ 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:
Janie Poe, The Courts, Orange Avenue, Bertha Mitchell

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]
Applicability of component 8: Section 8 only PHAs are not required to complete this section.

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

2. Activity Description

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

Demolition/Disposition Activity Description
1a. Development name: Janie Poe, The Courts, Orange Avenue, Bertha Mitchell 1b. Development (project) number:FL008
2. Activity type: Demolition ☒ Disposition ☐
3. Application status (select one) Approved ☐ Submitted, pending approval ☐ Planned application ☒
4. Date application approved, submitted, or planned for submission: Unknown
5. Number of units affected: 549 6. Coverage of action (select one) ☐ Part of the development ☒ Total development
7. Timeline for activity: a. Actual or projected start date of activity: Unknown b. Projected end date of activity:

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

[24 CFR Part 903.7 9 (i)]
Exemptions from Component 9; Section 8 only PHAs are not required to complete this section.

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

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

2. Activity Description

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

Designation of Public Housing Activity Description
1a. Development name: McCown Towers 1b. Development (project) number: FL008004
2. Designation type: Occupancy by only the elderly ☒ Occupancy by families with disabilities ☐ Occupancy by only elderly families and families with disabilities ☐
3. Application status (select one) Approved; included in the PHA's Designation Plan ☐ Submitted, pending approval ☐ Planned application ☒ Unknown
4. Date this designation approved, submitted, or planned for submission: (DD/MM/YY)
5. If approved, will this designation constitute a (select one) ☐ New Designation Plan ☐ Revision of a previously-approved Designation Plan?
6. Number of units affected: 100 7. Coverage of action (select one) ☐ Part of the development ☒ Total development

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

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

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

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

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

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

☐ Requirements no longer applicable: vacancy rates are less than 10 percent
☐ Requirements no longer applicable: site now has less than 300 units
☐ Other: (describe below)

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

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

Five of Six Developments

b. How many of the PHA's developments are not subject to the Required Initial Assessments based on exemptions (e.g., elderly and/or disabled developments not general occupancy projects)?

One

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

One

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

Development Name	Number of Units

a. If the PHA has not completed the Required Initial Assessments, describe the status of these assessments.

N/A

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

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

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

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

2. Activity Description

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

Public Housing Homeownership Activity Description (Complete one for each development affected)
1a. Development name: Cohen Way 1b. Development (project) number: FL008001006
2. Federal Program authority: ☐ HOPE I ☐ 5(h) ☐ Turnkey III ☒ Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one) ☒ Approved; included in the PHA's Homeownership Plan/Program ☐ Submitted, pending approval ☐ Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: 06/24/2003

5. Number of units affected: 36
6. Coverage of action: (select one)
☒ Part of the development
☐ Total development

B. Section 8 Tenant Based Assistance

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

2. Program Description:

a. Size of Program
☐ Yes ☐ No: Will the PHA limit the number of families participating in the section 8 homeownership option?

If the answer to the question above was yes, which statement best describes the number of participants? (select one)
☐ 25 or fewer participants
☐ 26 - 50 participants
☐ 51 to 100 participants
☐ more than 100 participants

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

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (l)]
Exemptions from Component 12: High performing and small PHAs are not required to complete this component. Section 8-Only PHAs are not required to complete sub-component C.

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

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

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

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

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

B. Services and programs offered to residents and participants

(1) General

a. Self-Sufficiency Policies

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

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

b. Economic and Social self-sufficiency programs

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

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

(2) Family Self Sufficiency program/s

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2003 Estimate)	Actual Number of Participants (As of: 12/09/03)
Public Housing	0	15
Section 8	5	26

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

C. Welfare Benefit Reductions

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

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

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

HOUSING AUTHORITY OF THE CITY OF SARASOTA

COMMUNITY SERVICE/SELF SUFFICIENCY POLICY

A. Background

The Quality Housing and Work Responsibility Act of 1998 requires that all non-exempt (see definition) public housing adult residents (18 or older) contribute eight (8) hours per month of community service (volunteer work) or participate in eight (8) hours of training, counseling, classes and other activities which help an individual toward self sufficiency and economic independence. This is a requirement of Public Housing Lease.

B. Definitions

Community Service – volunteer work which includes, but is not limited to:

- Work at a local school, hospital, recreation center, senior center or child care center

- Work with youth or senior organizations
- Work at the Authority to help improve physical conditions
- Work at the Authority to help with children's programs
- Work at the Authority to help with senior programs
- Work at the Authority to help in the administrative offices
- Helping neighborhood groups with special projects
- Working through resident organizations to help other residents with problems
- Caring for the children of other residents so they may volunteer
  NOTE: Political activity is excluded.

Self Sufficiency Activities – activities that include, but are not limited to:

- Job training programs
- GED classes
- Substance abuse or mental health counseling
- English proficiency or literacy (reading) classes
- Budgeting and credit counseling
- Any kind of class that helps a person toward economic independence

Exempt Adult – an adult member of the family who

- Is 62 years of age or older
- Has a disability that prevents him/her from being gainfully employed
- Is the caretaker of a disabled person
- Is working at least 20 hours per week
- Is participating in a welfare to work program

- Is receiving assistance from TANF and is in compliance with job training and work activities requirements of the program

C. Requirements of the Program

1. The eight (8) hours per month may be volunteer work, self sufficiency program activities or a combination of the two.
2. At least eight (8) hours of activity must be performed each month. An individual may not skip a month and then double up the following month, unless special circumstances warrant special consideration. The Authority

will make the determination of whether to allow or disallow a deviation from the schedule. If no approval was received from the Authority, the deviation will be considered noncompliance of this policy.

3. Activities must be performed within the community and not outside the jurisdictional area of the Authority.
4. Family obligations:
    - At lease execution or re-examination all adult members (18 or older) of a public housing resident family must:
        (a) provide documentation that they are exempt from Community Service requirement if they qualify for an exemption, and
        (b) sign a certification that they have received and read this policy and understand that if they are not exempt, failure to comply with the Community Service requirement will result in non-renewal of their lease.
    - At each annual re-examination, non-exempt family members must present a completed documentation form (to be provided by the Authority) of activities performed over the previous twelve (12) months. This form will include places for signature of supervisors, instructors, or counselors certifying the number of hours contributed.
    - If a family member is found to be noncompliant at re-examination, he/she and the Head of Household will sign an agreement with the Authority to make up the deficient hours over the next twelve (12) month period.

1. Change in exempt status:
    - If, during the twelve (12) month period, a non-exempt person becomes exempt, it is his/her responsibility to report this to the Authority and provide documentation of such.
    - If, during the twelve (12) month period, an exempt person becomes non-exempt, it is his/her responsibility to report this to the Authority. The Authority will provide the person with the Recording/Certification documentation form and a list of agencies in the community that provide volunteer and/or training opportunities.

A. Authority obligations

1. To the greatest extent possible and practical, the Authority will
    - provide names of agencies and applicable contact personnel that can provide opportunities for residents, including disabled, to fulfill their Community Service obligations. (According to the Quality Housing and Work Responsibility Act, a disabled person who is otherwise able to be gainfully employed is not necessarily exempt from the Community Service requirement.)
2. The Authority will provide the family with exemption verification forms and Recording/Certification documentation forms and a copy of this policy at initial application and at lease execution.
3. The Authority will make the final determination as to whether or not a family member is exempt from the Community Service requirement. Residents may use the Authority's Grievance Procedure if they disagree with the Authority's determination.
4. Noncompliance of family member
    - At least thirty (30) days prior to annual re-examination and/or lease expiration, the Authority will begin reviewing the exempt or non-exempt status and compliance of the family members.
    - If the Authority finds a family member to be noncompliant, the Authority will enter into a written agreement with the noncompliant member and the Head of Household to make up the deficient hours over the twelve (12) month period.
    - If, at the next annual re-examination, the family member still is not compliant, the lease will not be renewed and the entire family will have to vacate, unless the noncompliant member agrees to move out of the unit.
    - The family may use the Authority's Grievance Procedure to protest the lease termination.

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.7 9 (m)]

Exemptions from Component 13: High performing and small PHAs not participating in PHDEP and Section 8 Only PHAs may skip to component 15. High Performing and small PHAs that are

participating in PHDEP and are submitting a PHDEP Plan with this PHA Plan may skip to sub-component D.

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

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

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

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

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

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

The Courts, Cohen Way & Orange Avenue

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

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

☒ Contracting with outside and/or resident organizations for the provision of crime- and/or drug-prevention activities
☐ Crime Prevention Through Environmental Design
☒ Activities targeted to at-risk youth, adults, or seniors

☒ Volunteer Resident Patrol/Block Watchers Program
☐ Other (describe below)

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

All Developments

C. Coordination between PHA and the police

1. Describe the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities: (select all that apply)

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

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

All developments and admissions

D. Additional information as required by PHDEP/PHDEP Plan

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

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

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

HOUSING AUTHORITYOF CITY OF SARASOTA

PET OWNERSHIP POLICY

For Family Developments

APPROVED BY THE BOARD OF COMMISSIONERS

February 19, 2001
APPROVAL DATE

PET OWNERSHIP POLICY
FOR
FAMILY DEVELOPMENTS

The following rules will apply for the keeping of pets by Residents living in the units operated by the Housing Authority of the City of Sarasota (SHA). These rules do not apply to service or companion animals that are needed by a person with a documented disability.

A. PET RULES:

1. Common household pets as authorized by this policy means a domesticated animal, such as a cat, dog, fish, bird, gerbil or a hamster. Reptiles of any kind, with the exception of small turtles, as well as mice and rats are prohibited. These definitions do not include any wild animals, birds or fish.

2. Each household will have only one pet (except fish or birds). Not more than two (2) birds are allowed.

3. The pet owner will have only a small cat or dog. The animal's weight will not exceed 20 pounds. The animal's height will not exceed 12 inches at the shoulders. Such limitations do not apply to a service animal used to assist a disabled resident.

4. Pet owners will license their pets yearly with the appropriate city or as required. The pet owner must produce proof of rabies and distemper booster inoculations to HACS, a statement from a licensed veterinarian as to the overall health of the dog or cat and licensing annually. The pet owner must also carry renter's liability or other form of liability insurance, which covers household pets.

form **HUD 50075** (03/2003)

5. No pet owner will 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 owner will have his or her cat or dog spayed or neutered and will pay the cost thereof. A veterinarian will verify that the spaying or neutering has been accomplished. If the animal is less than six (6) months old, residents must agree to have the appropriate procedures performed when the animal reaches the age of six (6) months. Exceptions to this requirement will 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. The pet owner will house that pet inside the pet owner's dwelling unit. The pet owner will keep a cat or a dog on a leash and will control the animal when it is taken out of the dwelling unit for any purpose. The owner of a bird(s) will confine them to a cage at all times. No pet owner will allow the pet to be unleashed or loose outside the pet owner's dwelling unit.

8. No resident will 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.

9. No pet owner will keep a vicious or intimidating pet on the premises (i.e. pit bull, chow, doberman, german shepherd). If the pet owner declines or delays to remove such a pet, the HACS will do so, in order to safeguard the health and welfare of the residents.

10. No pet owner will permit his/her pet to disturb, interfere or diminish the peaceful enjoyment of the pet owner's neighbors or other residents. The term "disturb, interfere or diminish" will include but not limited to barking, howling, biting, scratching or chirping. If the pet owner declines or refuses to remove the pet from the premises, the HACS will do so.

11. The owner of a cat will 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 a year. The pet owner will not permit refuse from the litter box to accumulate or to become unsanitary or unsightly, and will dispose of such droppings by placing them in a plastic

sack with tie in a designated trash container outside the building where the pet owner lives.

12. The owner of a dog will feed the animal at least once per day; take the animal for a walk at least twice per day; remove the animal droppings at least twice per day; and take the animal to a veterinarian at least once per year. The pet owner will not permit dog droppings to accumulate or to become unsanitary or unsightly, and will dispose of such droppings by placing them in a plastic sack with tie in a designated trash container outside the building where the pet owner lives.

13. The pet owner will take the precautions and measures necessary to eliminate pet odors within and around the dwelling unit, and will maintain the dwelling unit in a sanitary condition at all times, as determined by the HACS.

14. No pet owner will alter the dwelling unit or the surrounding premises to create a space, hole, container or enclosure for any pet.

15. HACS staff will 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 law or ordinances in this regard. The HACS will accept no responsibility for the pet under such circumstances.

16. Each pet owner will pay a non-refundable pet fee of $100.00 times the number of bedrooms in his/her unit for the current pet. If any time that pet is removed or has died, a unit inspection will be done and the deposit will be utilized to remedy the damage, if any, any replacements and fumigation of the unit. If at any time in the future another pet was brought in to the unit, another one-time fee will be charged for that animal with the same calculation as the first time.

17. All residents are prohibited from feeding, housing or caring for stray animals or birds. Such action will constitute having a pet without permission of the HACS.

18. Each pet owner will 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/her pet, the alternate custodian will assume responsibility for the care and keeping of the pet, including the removal of the pet from the HACS premises if necessary.

19. If a resident, including a pet owner, breaches any of the rules set forth above, the HACS may revoke the privilege of having a pet and evict the resident or pet owner.

A. NOTICE OF PET RULE VIOLATION:

1. When the HACS determines on the basis of objective facts supported by written statement, that a pet owner has violated one or more of these rules governing the owning or keeping of pets, the HACS will :

   a. Serve a notice of the pet rule violation on the owner by sending a letter by first class mail, stamped and addressed to the resident at the leased dwelling unit, with a proper return address, or
   b. Serve a copy of the notice on any adult answering the door at the resident's leased dwelling unit, or if no adult responds, by placing the notice under or through the door if possible, or lease by attaching the notice to the door and documenting in the file that the notice has been served on that day.

1. The notice of pet rule violation must contain a brief statement of the factual basis for the determination and the pet rule or rules alleged to be violated.

2. The notice must state that the pet owner has ten (10) days from the effective date of service of notice to correct the violation (including, in appropriate circumstances, removal of the pet). The pet owner may make a written request for a meeting to discuss the violation, (the effective date of service is the day that the notice is delivered or mailed, or in the case of service by posting, on the day that the notice was initially posted).

3. The notice must state that the pet owner can bring another person of his or her choice for the meeting.

4. The notice must 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 terminate the pet owner's Lease.

A. PET RULE VIOLATION MEETING:

1. If the pet owner makes a timely request for a meeting to discuss an alleged pet rule violation, the HACS will establish a mutually agreeable time and place for the meeting. The meeting should be arranged within ten (10) days from the effective date of serving the notice of pet rule violation (unless the HACS agrees to a later date).

2. The HACS and the pet owner will discuss any alleged pet rule violation and attempt to correct it and reach an agreeable understanding.

3. The HACS may, as a result of the meeting, give the pet owner additional time to correct the violation.

4. Whatever decision or agreements that was made should be in writing, signed by both parties, with one copy for the pet owner and one copy placed in the resident's file.

A. NOTICE OF PET REMOVAL:

1. If the pet owner and the HACS are unable to resolve the pet rule violation at the meeting, or if the HACS determines that the pet owner has failed to correct the pet rule violation within any additional time provided for this purpose, then the HACS will require the pet owner to remove the pet.

2. The notice will contain a brief statement of the factual basis for the determination and the pet rule(s) that have been violated and a statement that the pet owner must remove the pet within ten (10) days of the effective date of service of notice.

3. The notice will also state that failure to remove that pet may result in initiation of procedures to terminate the pet owner's residency.

A. INITIATION OF PROCEDURE TO TERMINATE PET OWNER'S RESIDENCY:

1. The HACS will not initiate the termination process of the pet owner's residency based on a pet rule violation unless;

   a. the pet owner has failed to remove the pet or correct the pet rule violation within the specific time period approved by the HACS.

b. the pet rule violation is sufficient to begin the termination process of the pet owner's residency under the terms of the Lease and application regulations, and

c. there is provision in resident's Lease that requires that the residency will be terminated in any violation of the Lease.

A. PROTECTION OF THE PET:

If the health or safety of a pet is threatened by the illness, death or incapacity of the pet owner, or by other factors that render the pet owner unable to care for the pet, the HACS may;

a. contact the responsible party or parties listed in the registration form and ask that they assume responsibility for the pet.

b. If the responsible party or parties are unwilling or unable to care for the pet, the HACS may contact the appropriate state or Local HACS and request to remove the pet.

c. If the HACS is unable to contact the responsible party or parties despite reasonable efforts, the HACS will contact the appropriate state or local agencies and request removal of the pet.

d. If none of the above actions work, the HACS staff may enter the pet owner's unit, remove the pet and place the pet in a facility that will provide care shelter for a maximum of thirty (30) days. This will be done only until the pet owner or a representative of the pet owner is able to assume the responsibility for the pet. The cost of the animal care facility provided under this section will be borne by the pet owner.

A. NUISANCE OR THREAT TO HEALTH OR SAFETY:

Nothing in this Policy prohibits the HACS or the appropriate state or local authorities from removing the pet from the HACS property if the pet's conduct or condition is duly determined to constitute, under the provisions of state or local law, a nuisance or a threat to the health and safety of other occupants or neighbors where the complex is located.

B. APPLICATION OF RULES:

1. Pet owners will be responsible and liable for any and all bodily harm to other residents or individuals. Destruction of personal property

belonging to others caused by owner's pet will be the moral and financial obligation of the pet owner.

2. This pet rule will apply to all residents and their relatives and guests.

HOUSING AUTHORITY OF CITY OF SARASOTA

PET POLICY AGREEMENT

Management considers that keeping the pets is serious responsibility and a risk to each resident in the apartment. If you do not properly control and care for a pet, you will be held liable if it causes any damage or disturbs other residents.

1. Conditional Authorization for Pet: **You** may keep the pet that is described below in the apartment until your Dwelling Lease is terminated. Management may terminate this authorization sooner if your right of occupancy is lawfully terminated or if you or your pet, your guests or any member of hour household violate any of the rules contained in the HACS's Pet Policy or in this Agreement.

2. Pet Fee: The pet fee will be $100.00 X the number of bedrooms in your unit for your current pet. The pet fee is a one time, **non-refundable** charge.

- If, at any time in the future, if you get rid of this pet, the deposit will be used to solve the problems created by the animal. If you decide to have a pet again, another one-time **non-refundable** fee will be charged for the animal.

- This fee will be used to pay reasonable expenses directly attributable to the presence of the complex, including but not limited to, the cost of repairs and replacement to and fumigation of, the apartment.

3. Liability not limited: The fee under this deposit does not limit the resident's liability for property damages, cleaning, deodorization, treatment of flees and replacement of items damaged by the pet and or for bodily injuries.

4. Description of Pet: You can keep only one pet as described below. The pet may not exceed twelve (12) inches in height at the

form **HUD 50075** (03/2003)

shoulders and twenty (20) pounds in adult weight. You may not substitute other pets for this one without amending this Agreement.

Pet's Name:_____Type:_____

Breed: _____ Color: _____Weight: _____ Age: _____

City of License: _____License #_____ Date of last Rabies shot:_____

Name, address and phone number of person(s) able to care for the pet in case of resident's permanent or temporary inability to care for the pet.

Name: _____Phone #_____

Address:_____

NOTE: Certification of licensing and pet inoculation must be updated annually with Lease renewal and a copy of the same must be provided to keep in your file.

I have read and understand the above pet ownership Rules and agree to abide by them.

_____ _____

Head of Household **Date**

_____ _____

Authority Staff **Date**

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

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

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

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

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

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

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

2. What types of asset management activities will the PHA undertake? (select all that apply)

☐ Not applicable
☐ Private management
☐ Development-based accounting
☐ Comprehensive stock assessment
☐ Other: (list below)

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

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

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

2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
☐ Attached at Attachment (File name)
☒ Provided below:

Ms. Susan Foy, McCown Towers expressed concerns regarding the resident's security in her development.

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)
HACS recently installed a new Access Card Entry system to the buildings in her development to provide enhanced security for the residents.

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

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

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

3. Description of Resident Election Process

a. Nomination of candidates for place on the ballot: (select all that apply)
☐ Candidates were nominated by resident and assisted family organizations
☐ Candidates could be nominated by any adult recipient of PHA assistance
☐ Self-nomination: Candidates registered with the PHA and requested a place on ballot
☐ Other: (describe)

b. Eligible candidates: (select one)
☐ Any recipient of PHA assistance
☐ Any head of household receiving PHA assistance

☐ Any adult recipient of PHA assistance
☐ Any adult member of a resident or assisted family organization
☐ Other (list)

c. Eligible voters: (select all that apply)
☐ All adult recipients of PHA assistance (public housing and section 8 tenant-based assistance)
☐ Representatives of all PHA resident and assisted family organizations
☐ Other (list)

C. Statement of Consistency with the Consolidated Plan

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

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

☒ The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
☒ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
☐ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)

☐ Other: (list below)

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

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
Table Library

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

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

Capital Fund Grant Number FFY of Grant Approval: (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	**Amount of Annual Grant (Sum of lines 2-19)**	
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
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

Annual Statement
Capital Fund Program (CFP) Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)	All Funds Expended (Quarter Ending Date)

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)**
Total estimated cost over next 5 years		

Optional Public Housing Asset Management Table

See Technical Guidance for instructions on the use of this table, including information to be provided.

Public Housing Asset Management								
Development Identification		**Activity Description**						
Name, Number, and Location	Number and Type of units	Capital Fund Program Parts II and III *Component 7a*	Development Activities *Component 7b*	Demolition / disposition *Component 8*	Designated housing *Component 9*	Conversion *Component 10*	Home-ownership *Component 11a*	Other (describe) *Component 17*

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

PHA Name:	Grant Type and Number	Federal FY of Grant:
SARASOTA HOUSING AUTHORITY	Capital Fund Program Grant No: **FL14P00850103** Replacement Housing Factor Grant No:	**2003**

☐ Original Annual Statement ☐ Reserve for Disasters/Emergencies ☐ Revised Annual Statement (revision no. -)

☑ Performance and Evaluation Report for Program Year Ending 2004 ☐ Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	80,000.00		80,000.00	80,000.00
3	1408 Management Improvements				
4	1410 Administration	67,976.00		67,976.00	17,920.00
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	25,000.00		25,000.00	12,107.00
8	1440 Site Acquisition				
9	1450 Site Improvement	10,586.00		10,586.00	10,586.00
10	1460 Dwelling Structures	491,200.00		227,000.00	175,865.00
11	1465.1 Dwelling Equipment - Nonexpendable				
12	1470 Nondwelling Structures	-			
13	1475 Nondwelling Equipment	5,000.00		5,000.00	3,042.00
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collaterization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant (Sum of lines 2-20)	$ 679,762.00		$ 415,562.00	$ 299,520.00
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 Conversation Measures	-	-	-	-

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

PHA Name:	Grant Type and Number	Federal FY of Grant:
SARASOTA HOUSING AUTHORITY	Capital Fund Program Grant No: **FL14P00850103** Replacement Housing Factor Grant	**2003**

Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA Wide	Operations	1406		80,000.00		80,000.00	80,000.00	
HA Wide	Administration	1410		67,976.00		67,976.00	17,920.00	
HA Wide	Fees and Costs	1430		25,000.00			12,107.00	
HA Wide	Site Improvements	1450		10,586.00			10,586.00	
HA Wide	Non-Dwelling Equipment	1475		5,000.00			3,042.00	
FL008-04	Replace Existing Windows	1460		175,000.00	-		-	
McCown	& Siding Glass Doors with Wind							
Towers	resistant windows to meet							
	hurricane codes							
	Exterior Paint - 11 Story High-Rise	1460		80,000.00	80,000.00	-	-	
	Building							
	Replace Door Locks	1460		6,200.00	6,200.00	-	-	
	100 Resident Units							
	Reroof 11 Story High Rise Bldg.	1460		120,000.00		89,000.00	51,480.00	

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

PHA Name:	Grant Type and Number	Federal FY of Grant:
SARASOTA HOUSING AUTHORITY	Capital Fund Program Grant No: FL14P00850103 Replacement Housing Factor Grant	2003

Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL008-05B	Replace Roofs Three Bldgs.	1460		110,000.00		110,000.00	124,385.00	
Cohen Way	36 units							
	Totals			679,762.00				

Annual Statement / Performance and Evaluation Report

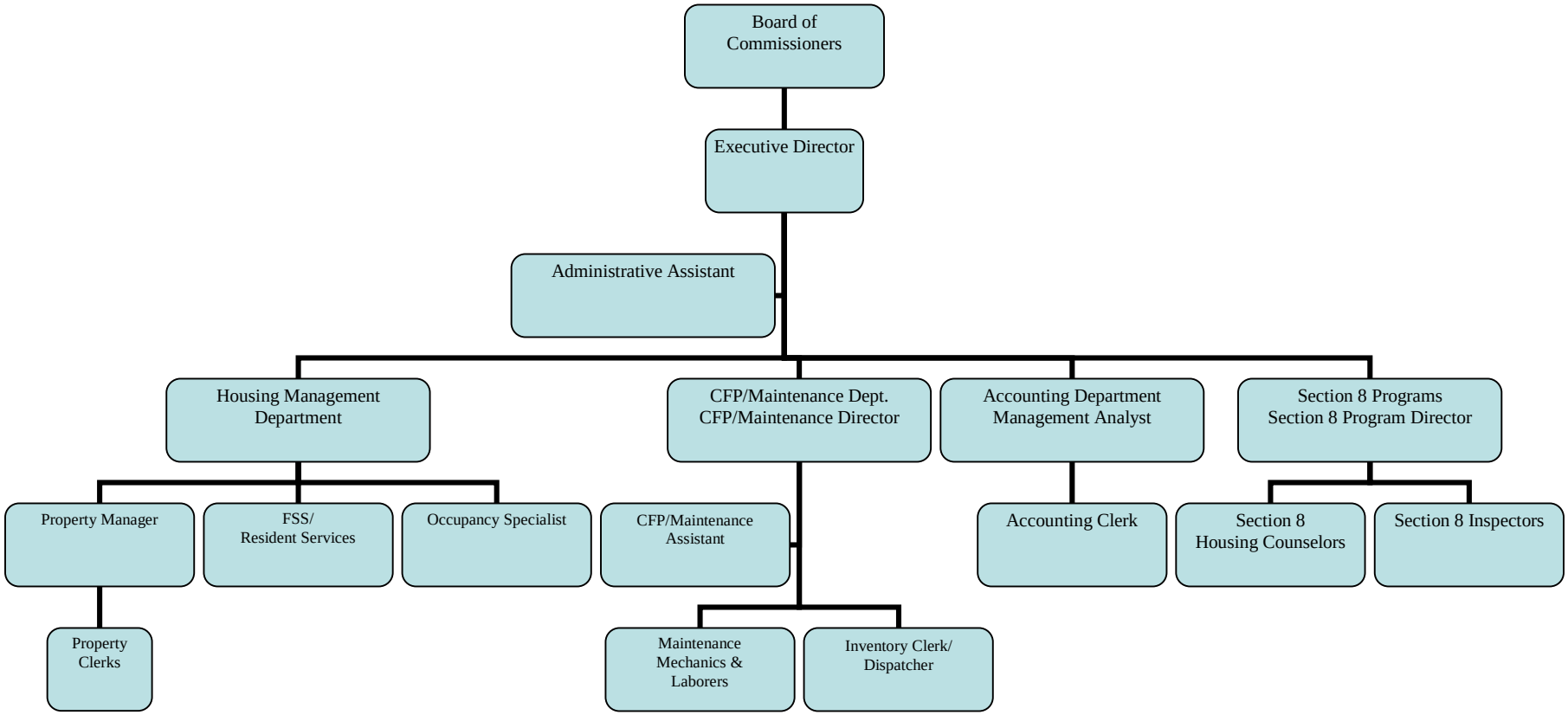
Capital fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part III: Implementation Schedule

PHA Name:	Grant Type and Number	Federal FY of Grant:
SARASOTA HOUSING AUTHORITY	Capital Fund Program Grant No: FL14P00850103 Replacement Housing Factor Grant No:	2003

Development Number Namw/HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
FL008-04 & 05	9/30/2005			9/30/2005			
& HA Wide							

Housing Authority of the City of Sarasota



Five-Year Action Plan
Part I: Summary
Comprehensive Grant Program (CGP)

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

HA Name: **Sarasota Housing Authority**

Locality: (City/County & State) **Sarasota, FL**

[X] Original [ ] Revision No.

A. Development Number/Name	Work Statement for Year 1 FFY: 2004	Work Statement for Year 2 FFY: 2005	Work Statement for Year 3 FFY: 2006	Work Statement for Year 4 FFY: 2007	Work Statement for Year 5 FFY: 2008
FL8-1 ORANGE AVENUE					911,718.00
FL8-2 THE COURTS		3,385,785.00			
FL8-3 BERTHA MITCHELL	**See**		3,683,010.00		
FL8-4 MCCOWN TOWERS	**Annual**			3,478,327.00	
FL8-5A JANIE POE	**Statement**				5,468,276.00
FL8-5B COHEN WAY					2,855,513.00
PHA WIDE					
B. Physical Improvements Subtotal		3,385,785.00	3,683,010.00	3,478,327.00	9,235,507.00
C. Management Improvements		0.00	0.00	0.00	175,000.00
D. HA-Wide Nondwelling Structures and Equipment		10,000.00	100,000.00	100,000.00	100,000.00
E. Administration		125,000.00	125,000.00	125,000.00	125,000.00
F. Other		245,000.00	245,000.00	245,000.00	370,000.00
G. Replacement Reserve					
H. Total CGP FUNDS		$3,765,785.00	$4,153,010.00	$3,948,327.00	$10,005,507.00
I. Total Non-CGP Funds					
J. Grand Total		$3,765,785.00	$4,153,010.00	$3,948,327.00	$10,005,507.00

Signature of Executive Director | Date: | Signature of Public Housing Director | Date:

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ref Handbook 7485.3

Five-Year Action Plan
Part II: Supporting Pages
Physical Needs Work Statement(s)
Comprehensive Grant Program (CGP)

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

Work Statement for Year 1 FFY: 2004	Work Statement for Year FFY: 2005			Work Statement for Year FFY: 2006		
	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost
	THE COURTS FL8-2			**BERTHA MITCHELL 8-3**		
	Asphalt overlay on roadways	1	75,000	Clothes lines restrung	1	7,200
	Clothes line restrung	1	7,200	Concrete stoop erosion repair	40	8,000
See	Concrete stoop erosion repair	40	8,000	Tree pruning	20	4,000
	Tree pruning	1	10,000	Install pipe bollards	50	10,000
Annual	Remove abandoned irrigation pumps	1	1,000	Accessible sidewalk @ mail kiosks	8	2,000
	Install pipe bollards	50	10,000	Kitchen casework	100	210,000
Statement	remove abandoned gas lightpost foundations	1	6,000	Gutters & downspouts	100	25,000
	Sidewalk repair	20	6,000	Shingle roof repair	50	5,250
	Concrete dumpster surrounds	6	30,000	exterior doors & security screens	100	110,000
	Kitchen casework & countertops	100	210,000	Interior door refinishing	114	9,120
	Shingle roof replacement & soffitt & fascia	27	270,000	Replace windows	536	482,400
	Roof overhang replacement	200	300,000	Exterior door locksets	50	25,000
	replace exterior doors & security screens	100	110,000	Exterior threshold & weatherstrip	200	25,000
	Interior door refinishing	250	20,000	Repair damage to walls/doors	5,000	15,000
	Replace windows & security screens	200	200,000	Stucco repair	20	6,000
	Exterior door lockset replacement	100	20,000	VCT replacement	192,024	576,072
	Exterior door threshold replacement	100	10,000	Interior painting	100	100,000
	Replace interior wood walls & doors	92,000	276,000	Mailboxes	100	5,400
	Exterior painting	92,000	276,000	Tub surrounds	100	40,000
	Interior painting	100	75,000	Remove gas/electr space heaters	100	7,500
	Mailboxes	100	5,400	Remove tubs & shower valves	100	8,000
	New tub surrounds	100	40,000	Remove cast iron piping under slabs & cleanouts	100	420,000
	Remove pump & piping	1	2,000	Remove range hoods	100	3,000
	Remove gas site lighting	1	2,000	remove solar water heaters	100	5,000
	Remove 8" asbestos water main	1	90,000	New range hoods	100	19,000
	Remove all electric space heaters	188	9,400	Sleeves & supports for water pipes	100	7,500
	Remove tub & shower valves	100	8,000	New PVC waste piping	14,300	300,300
	Subtotal of Estimated Cost		**2,077,000**	Subtotal of Estimated Cost		**2,435,742**

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Five-Year Action Plan
Part II: Supporting Pages
Physical Needs Work Statement(s)
Comprehensive Grant Program (CGP)

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

Work Statement for Year 1 FFY: 2004	Work Statement for Year FFY: 2005			Work Statement for Year FFY: 2006		
	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost
	THE COURTS FL8-2 (con't)			**BERTHA MITCHELL 8-3 (con't)**		
	Remove PVC piping	14,300	100,815	New water meters & shut off valves	100	25,600
	New sleeves & supports for water pipes	100	7,500	Central heating/air	100	500,000
See	New PVC waste piping	14,300	300,300	New toilet exhaust fans	100	14,800
	New tub & shower valves	100	49,700	New wall mounted site light fixtures	100	46,700
Annual	New central heating & a/c	100	500,000	CF light fixtures	200	12,000
	New toilet exhaust fans	100	14,800	Remove 60A electrical service	100	40,000
Statement	Install CATV & telephone entraces	27	13,500	Remove transformers	10	3,000
	New exterior wall mounted site lighting	30	14,010	Remove existing interior lights	638	6,380
	Remove existing 100A electrical service	90	36,000	New 125 A electrical service	100	152,500
	Remove existing transformers	8	2,400	GFCI receptacles in kitchens/bath	300	7,200
	Remove all existing interior light fixtures	642	6,420	Replace switch/outlet covers	2,144	2,744
	New 150A electrical services	90	137,250	New interior lights	638	26,796
	Replace switch & outlet covers	2,168	4,878	New phone outlets bedrooms/kitchen	336	28,224
	New interior lighting fixtures	642	26,964	New CATV outlets bed/living rooms	236	19,824
	New telephone outlets in bathroom & kitchens	230	19,320	Remove/replace gas water heaters	100	60,000
	New CATV oulets in bedrooms & living rooms	342	28,728	Repipe all potable water & sewer lines	100	250,000
	Upgrade transformers	8	21,200	Upgrade transformers	10	26,500
	Subtotal of Estimated Cost		**1,283,785**	**Subtotal of Estimated Cost**		**1,222,268**

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Five-Year Action Plan
Part II: Supporting Pages
Physical Needs Work Statement(s)
Comprehensive Grant Program (CGP)

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

Work Statement for Year 1 FFY: 2004	Work Statement for Year FFY: 2005			Work Statement for Year FFY: 2006		
	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost
	AGENCY WIDE			AGENCY WIDE		
	Transfer to operations		160,000	Transfer to operations		160,000
See	CFP salary and benefits		125,000	CFP salary and benefits		125,000
	A & E fees and costs		35,000	A & E fees and costs		35,000
Annual	Site improvements trim trees,repair fences		25,000	Site improvements trim trees,repair fences		25,000
	Non-dwelling equipment		10,000	Non-dwelling equipment		100,000
Statement	Relocation Costs		-	Relocation Costs		-
	Contingency costs		50,000	Contingency costs		50,000
	Subtotal Agency Wide		405,000	Subtotal Agency Wide		495,000
	Total of Estimated Cost		**3,765,785**	**Total of Estimated Cost**		**4,153,010**

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Five-Year Action Plan
Part III: Supporting Pages
Management Needs Work Statement(s)
Comprehensive Grant Program (CGP)

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

Work Statement for Year 1 FFY: 2002	Work Statement for Year FFY: 2007			Work Statement for Year FFY: 2008		
	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost
	Mccown Towers 8-4			**ORANGE AVENUE 8-1**		
	Reseal/restripe parking lot	24,000	24,000	Install pipe bollards	50	10,000
	Mill existing asphalt surface & apply asphalt overlay	24,000	72,000	Asphalt overlay at parking	12,000	48,000
See	Repair concrete curbs	6	1,200	Sidewalk repair	18	5,400
	Install pipe bollards	30	6,000	Concrete dumpsters surrounds	4	11,000
Annual	Repair damage to gates & railings	1	500	Kitchen casework & countertop replacement	420	63,000
	Regrade below perimeter fencing	1	500	Sealant replacement around windows	1,000	2,500
Statement	Clear/clean stormwater system	1	3,000	Roof replacement at Maint Building	1	40,000
	Refinish existing benches & install new	1	5,000	Exterior door repainting/weatherproofing	120	30,000
	Demolish & rebuild barbecue at courtyard	1	2,500	Interior door refinishing	174	13,920
	Remove shuffleboard courts	1	2,000	Single-hung windows	308	77,000
	Sidewalk repair	4	1,000	Exterior door lockset replacements	120	24,000
	Replace accessible entrance	1	5,000	Exterior door thresholds	120	12,000
	Laundry/Storage crack problem	1	30,000	VCT replacement	37,170	65,048
	Stair/step repairs	4	1,000	Install furring & insulation at exterior walls	6,000	18,000
	Seal masonary pentrations	1	4,000	Interior painting	60	45,000
	ACM abatement	100	250,000	VCT asbestos removal - Maint building	1	30,000
	Kitchen casework & countertop replacement	102	214,200	Exterior painting - Maint building & units	1	137,125
	Replace exterior doors	66	72,600	Mailboxes	60	3,240
	Replace exterior hollow metal doors at first floor	9	9,900	Remove/replace gas heaters	104	62,400
	Replace overhead door at Maintenance shop	1	2,300	Remove tub & shower valves	60	4,800
	Interior door refinishing	75	6,000	Remove cast iron piping	8,580	69,069
	Exterior door lockset replacement	101	20,200	Remove 4" asbestos water main	1	200,000
	Exterior door threshold replacement	110	11,000	Slleves & supports for water pips	60	4,500
	Painting/staining fence at generator	1	400	New potable water water distribution	60	150,000
	Cleaning/painting of gazebo	1	3,000	New 30 gallon hot water heaters	60	36,000
	Weatherproofing building	1	125,000	PVC waste piping	1	36,000
	VCT flooring replacement	84,856	254,568	New tubs & shower valves	60	29,820
	Subtotal of Estimated Cost		**1,126,868**	**Subtotal of Estimated Cost**		**1,227,822**

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Five-Year Action Plan
Part III: Supporting Pages
Management Needs Work Statement(s)
Comprehensive Grant Program (CGP)

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

Work Statement for Year 1 FFY: 2004	Work Statement for Year FFY: 2007			Work Statement for Year FFY: 2008		
	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost
	Mccown Towers 8-4 (con't)			**ORANGE AVENUE 8-1 (con't)**		
	Trash collection room painting	1	1,800	New central heating & a/c	60	300,000
	Trash compactor system	1	32,000	New toilet exhaust fans	60	8,880
See	Finishes renovation ceramics, maint, lobby & clinic	4	20,000	Remove air handling units - Maintenance bldg	4	1,520
	repair damage to interior wood walls & doors	5,000	15,000	Remove cast iron piping - Maintenance bldg	300	2,415
Annual	Stucco texture repair	10	3,000	New hot water system - Maintenance bldg	4,000	4,480
	Interior painting	101	75,750	New PVC waste piping - Maintenance bldg	300	6,300
Statement	Mailboxes	101	5,454	New 50 gallon electric hot water heater - Maint bldg	1	525
	Trash chute doors at each level	10	6,000	New split system HVAC - Maintenance bldg	25	25,000
	New tub surrounds & tubs	101	80,800	New ductwork w/insulation - Maintenance bldg	600	16,200
	Hurricane shutters	1	389,869	Install CATV & telephone entraces	24	15,600
	Remove irrigation pump & piping	1	200	Exterior wall mounted site lighting	20	9,340
	Remove underground cast iron drain piping	1,500	12,075	Remove existing 100A electrical service	60	24,000
	Provide insect screens & main mechanicl room	30	60	Remove existing transformers	5	1,500
	Remove internally lined ductwork on 1st floor	3,000	6,300	Remove all existing interior light fixtures	354	3,540
	New electric water heaters	102	50,490	New 150A electrical services	60	91,500
	New range hoods	100	19,000	Replace switch & outlet covers	1,176	2,681
	Tub seats and pipe insulation in ADA units	10	2,500	New interior lighting fixtures	354	14,868
	New PVC waste piping	1,500	31,500	New stand alone fire detectors	60	345,000
	6" main water shut off valve removal	1	975	New telephone outlets in bathroom & kitchens	98	8,232
	Provide fixtures, faucets & trim in wellness center	10	5,000	New CATV oulets in bedrooms & living rooms	174	14,616
	Provide fixtures, faucets & trim in units	400	200,000	Upgrade transformers	5	13,250
	New fiberglass duct board/flex ducts on 1st floor	3,000	27,360	Repair security system & conduits	300	1,092
	New kiln room exhaust fans	2	296	Replace 50% of exit signs	3	354
	Remove existing light fixtures & poles in rear	10	1,200	Replace 50% of emergency light fixtures	3	825
	Remove TV antennas	2	1,000			
	Remove data conduits from exterior	1	20,000			
	GFCI receptacles @ bath countertops	100	7,500			
	New wall mounted site lighting	30	14,010			
	400 disconnects on each floor meter center	10	15,000			
	Subtotal of Estimated Cost		**1,044,139**	**Subtotal of Estimated Cost**		**911,718**

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Five-Year Action Plan
Part III: Supporting Pages
Management Needs Work Statement(s)
Comprehensive Grant Program (CGP)

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

Work Statement for Year 1 FFY: 2004	Work Statement for Year FFY: 2007			Work Statement for Year FFY: 2008		
	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost
	Mccown Towers 8-4 (con't)			**Cohen Way**		
	New meter center on each floor	10	50,000	Asphalt overlay on parking areas	7,000	28,000
	New house panels on each floor	10	12,250	Parking bumpers	1	1,000
See	New junction boxes for cable on each floor	10	6,000	Clothes lines restrung	1	7,500
	Remove existing interior light fixtures	567	5,670	Install pipe bollards	30	6,000
Annual	Replace switch & outlet covers	1,864	2,386	Remove TV antenna	1	3,000
	New interior lighting fixtures	567	23,814	Remove trash suppors & concrete foundations	1	8,000
Statement	Fire system unit sprinklers & pump & motor	1	450,000	Sidewalk repair	20	6,000
	Back flow preventor	1	10,000	Play area repair/resurfacing	225	2,925
	New potable water piping	100	250,000	Concrete dumpster surrounds	4	11,000
	New drop ceiling in maintenance room	1	3,400	Repair stair step cracking	25	6,250
	Remove sanitary piping - replace PVC	100	400,000	Kitchen casework	72	151,200
	New phone outlets in bedroom	100	8,400	Replace exterior doors / security screens	144	158,400
	New CATV outlets in bedrooms	100	8,400	Interior door refinishing	252	20,160
	Firefighters Service Operation	1	52,000	Replace windows & security screen install	396	396,000
	Subtotal		**1,282,320**	Exterior door lockset	72	14,400
	AGENCY WIDE			Exterior door thresholds	144	14,400
	Transfer to operations		160,000	VCT flooring replacement	73,416	330,372
	CFP salary and benefits		125,000	Asbestos removal	73,416	220,248
	A & E fees and costs		35,000	Replace interior wood walls & doors	55,200	165,600
	Site improvements trim trees,repair fences		25,000	Install stainless steel panels at stove walls	72	14,400
	Non-dwelling equipment		100,000	Interior painting	72	54,000
	Relocation Costs		-	Mailboxes	72	3,888
	Contingency costs		50,000	Basketball goal replacement	2	2,000
	Subtotal Agency Wide		**495,000**	New tub surrounds	72	28,800
				New range hoods	72	18,000
				Remove/replace all existing electric space heate	252	63,000
				Remove all exhaust fans in kitchen/bathroom	144	4,320
				remove all water closets	72	3,600
				remove all lavatories	72	3,600
				Remove all bath tubs & shower valves	72	5,760
	Total of Estimated Cost		**3,948,327**	**Subtotal of Estimated Cost**		**1,751,823**

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Five-Year Action Plan
Part II: Supporting Pages
Physical Needs Work Statement(s)
Comprehensive Grant Program (CGP)

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

Work Statement for Year 1 FFY: 2004	Work Statement for Year FFY: 2008			Work Statement for Year FFY: 2008		
	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost
	Cohen Way (con't)			**JANIE POE FL 8-5**		
	Remove sanitary piping	10,296	82,883	Asphalt overlay at parking	13,862	55,448
	New 1" potable water mains	72	36,000	Clothes line restrung	1	7,500
See	New sleeves & supports for water pipes	72	5,400	Chainlink fence replace	1	20,000
	New PVC waste piping	10,296	216,216	Install pipe bollards	50	10,000
Annual	New water closets	72	28,008	Remove trash can supports	1	12,000
	New lavatories	72	18,792	Sidewalk repairs	20	6,000
Statement	New bath tubs & shower valves	72	35,784	Concrete dumpster surrounds	8	22,000
	Central heating & a/c systems	72	360,000	Kitchen casework & countertops	1	350,000
	New toilet exhaust fans	72	10,656	Replace gutters & downspouts	128	32,000
	Demolish antenna tower	1	10,000	Shingle roof at community center	60	6,300
	Remove obsolete fire alarm system	5	12,500	Replace exterior doors & security screens	128	166,400
	Install CATV & phone entraces	10	6,500	Interior door refinishing	174	13,920
	New wall mounted site lighting fixtures	20	9,340	Replace windows & security screens	512	512,000
	Remove existing 100A electrical service	72	28,800	Exterior door lockset replacement	128	25,600
	Remove existing transformers	10	3,000	Exterior door threshold replacement	128	12,800
	Remove all existing interior light fixtures	468	4,680	VCT replacement	1	730,000
	New 150A electrical services	72	109,800	Asbestos abatement	139,972	419,916
	Replace switch & outlet covers	1,584	2,028	replace interior wood walls & doors	117,760	353,280
	Replace all switches & receptacles	1,584	23,760	Install stainless steel panels at stove walls	128	25,600
	New interior lighting fixtures	468	19,656	Interior painting	128	96,000
	New stand alone fire detectors	72	4,140	VCT replacement at community center	1	15,000
	GFCI receptacles in bathroom & kitchen	288	6,912	New acoustic ceilings at community center	13,000	65,000
	New telephone outlets in bathroom & kitchens	252	21,168	Replace exterior doors at community center	1	16,000
	New CATV oulets in bedrooms & living rooms	252	21,168	Mailboxes	128	6,912
	Upgrade transformers	10	26,500	Provide new tub surrounds	128	51,200
				Playground equipment/ball court remodel	1	65,000
				New range hoods	128	32,000
				Remove/replace existing electric space heaters	490	122,500
				Remove exhaust fans in kitchen & bathrooms	256	7,680
				Remove all tubs & shower valves	128	10,240
	Sub-total of Estimated Cost		**1,103,690**	**Sub-total of Estimated Cost**		**3,268,296**

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Five-Year Action Plan
Part III: Supporting Pages
Management Needs Work Statement(s)
Comprehensive Grant Program (CGP)

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

Work Statement for Year 1 FFY: 2004	Work Statement for Year FFY: 2008			Work Statement for Year FFY: 2008		
	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name/General Description of Major Work Categories	Quantity	Estimated Cost
	JANIE POE FL 8-5 (con't)			**JANIE POE FL 8-5 (con't)**		
	Remove existing sanitary piping	18304	147,347	Remove all aluminum wiring	5000	6,250
	New sleeves & supports for water lines	60	4,500	Remove 100A fuse box	1	75
See	New 1" potable water mains	128	64,000	New copper wiring	5000	17,500
	PVC waste piping	18304	384,384	New 100A panleboard w/circuit breakers	1	875
Annual	Re-work CPVC plumbing	19200	216,000	Replace 50% exit signs	6	708
	New tubs & shower valves	128	63,616	Replace 50% emergency light fixtures	6	1,650
Statement	Central heating & a/c	128	640,000	Subtotal		**27,058**
	New toilet exhaust fans	128	18,944	FYE 2008 subtotal		**9,235,507**
	Remove all air handling units	6	2,280			
	Remove cast iron piping	300	2,415	AGENCY WIDE		
	New PVC waste piping	300	6,300	Transfer to operations		160,000
	New split system HVAC	40	40,000	CFP salary and benefits		125,000
	New ductwork & insulation	800	21,600	A & E fees and costs		35,000
	Demolish antenna tower	1	10,000	Site improvements trim trees,repair fences		25,000
	Remove obsolete fire alarm system	13	32,500	Non-dwelling equipment		100,000
	Install CATV & telephone entraces	26	16,900	Relocation Costs		100,000
	Enclose electric meters	1	20,000	Management Improvements		175,000
	New wall mounted site lighting	40	18,680	Contingency costs		50,000
	Remove existing 100A electrical service	128	51,200	Subtotal Agency Wide		770,000
	Remove existing transformers	10	3,000			
	Remove all existing interior light fixtures	874	8,740			
	New 150A electrical services	128	195,200			
	Replace switch & outlet covers	2984	6,804			
	Replace all switches & receptacles	2984	44,760			
	New interior lighting fixtures	874	36,708			
	New stand alone fire detectors	128	7,360			
	GFCI receptacles in bathroom & kitchen	512	12,288			
	New telephone outlets in bathroom & kitchens	354	29,736			
	New CATV oulets in bedrooms & living rooms	490	41,160			
	Upgrade transformers	10	26,500			
	Total of Estimated Cost		**2,172,922**	**Subtotal of Estimated Cost**		**10,005,507**

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