

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

PHA Plans

5 Year Plan for Fiscal Years 2004 - 2008
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: Monroe Housing Authority

PHA Number: LA48P006

PHA Fiscal Year Beginning: 07/2004

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 2004 - 2008
[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.
- X The PHA's mission is: The Monroe Housing Authority is founded on the belief that decent, safe, and sanitary housing are central to the physical, and emotional health, the productivity, and the self-esteem for the people it serves. Recognizing it's responsibility to maintain physical properties, while affording dignity and respect to every individual, the objective of the Monroe Housing Authority is to improve the quality of life through a community partnership which promotes decent, safe, and sanitary neighborhoods.

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.

- X PHA Goal: Expand the supply of assisted housing
Objectives:
- X Apply for additional rental vouchers:
 - X Reduce public housing vacancies:
 - X Leverage private or other public funds to create additional housing opportunities:
 - X Acquire or build units or developments
 - Other (list below)
- X PHA Goal: Improve the quality of assisted housing
Objectives:
- X Improve public housing management: PHAS score by 2%
 - X Improve voucher management: (SEMAP score) by 2%
 - X Increase customer satisfaction:

- X Concentrate on efforts to improve specific management functions: public housing vacancy turnaround, Section 8 Family Self-sufficiency Program, voucher unit inspections, work order completion, resident satisfaction.
- X Renovate or modernize public housing units:
- X Demolish or dispose of obsolete public housing:

- X Provide replacement public housing:

- X Provide replacement vouchers:
 - Other: (list below)

- X PHA Goal: Increase assisted housing choices
 - Objectives:
 - X Provide voucher mobility counseling:
 - X Conduct outreach efforts to potential voucher landlords
 - X Increase voucher payment standards
 - X Implement voucher homeownership program:
 - Implement public housing or other homeownership programs:
 - X 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

- X PHA Goal: Provide an improved living environment
 - Objectives:
 - X Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
 - X Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
 - X Implement public housing security improvements:
 - X 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

- X PHA Goal: Promote self-sufficiency and asset development of assisted households
 - Objectives:
 - X Increase the number and percentage of employed persons in assisted families:

- X Provide or attract supportive services to improve assistance recipients' employability:
- X 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

- X PHA Goal: Ensure equal opportunity and affirmatively further fair housing Objectives:
 - X Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:
 - X 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:
 - X 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)

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.

In accordance with Section 511 of the Quality Housing and Work Responsibility Act of 1998, the Monroe Housing Authority is pleased to submit the Agency Plan. The Agency Plan is presented in two sections:

Section 1: Five-Year Plan

This section includes the PHA's Mission Statement, goals and objectives. The housing authority has considered the Mission Statement, goals and objectives of HUD in developing the Five-Year Plan.

Section 2: Annual Plan

This section includes the components required to be submitted by a **High performing housing authority**.

Please refer to the Table of Contents for the components included. Any required components that are not included in this submission are so indicated in the Table of Contents along with the location of the applicable materials and the date submitted to HUD, if required.

In the third year of required submission, the housing authority has elected to continue to operate its programs in an efficient, cost-effective manner and to explore the options authorized by the QHWRA, e.g. mortgaging of public housing properties. These options will be explored primarily as methods to increase the supply of affordable housing for **very low-income households and Elderly**.

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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

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Attachments

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

Required Attachments:

- A Admissions Policy for Deconcentration (phaplans-LA48006va05)
- B FY 2004 Capital Fund Program Annual Statement (phaplans-LA48006vb05)
- 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
- C FY 2004 Capital Fund Program 5 Year Action Plan (phaplans-LA48006vc05)
- D Public Housing Drug Elimination Program (PHDEP) Plan (phaplans-48006vd05)

- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- E Other (List below, providing each attachment name)
Performance & Evaluation Report for 2003 CFP (phaplans-LA48006ve05)

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 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents	Annual Plan: Rent Determination

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	X check here if included in the public housing A & O Policy	
X	Schedule of flat rents offered at each public housing development X check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies X 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 X check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures X check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
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
	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
X	Policies governing any Section 8 Homeownership program X check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
X	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
X	The most recent Public Housing Drug Elimination Program (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (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	3,485	5	5	5	N/A	N/A	N/A
Income >30% but <=50% of AMI	1,608	4	4	5	N/A	N/A	N/A
Income >50% but <80% of AMI	1,424	3	3	3	N/A	N/A	N/A
Elderly	1,299	4	4	3	N/A	N/A	N/A
Families with Disabilities	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Race/Ethnicity White/Non Hisp.	2,051	N/A	N/A	3	N/A	N/A	N/A
Race/Ethnicity Black/Non Hisp.	4,328	N/A	N/A	4	N/A	N/A	N/A
Race/Ethnicity Hispanic	46	N/A	N/A	4	N/A	N/A	N/A
Race/Ethnicity	N/A	NA	N/A	N/A	N/A	N/A	N/A

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: 2001
- U.S. Census data: the Comprehensive Housing Affordability Strategy (“CHAS”) dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	343		375
Extremely low income <=30% AMI	299	87.17%	
Very low income (>30% but <=50% AMI)	37	10.79%	
Low income (>50% but <80% AMI)	3	.87%	
Families with children	241	70.26%	
Elderly families	35	10.20%	
Families with Disabilities	75	21.87%	

Housing Needs of Families on the Waiting List			
Race/ethnicity-Black	286	83.38%	
Race/ethnicity-White	56	16.33%	
Race/ethnicity-Asian	0	0%	
Race/ethnicity-Other	1	.29%	
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 <input checked="" type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)? 16			
Does the PHA expect to reopen the list in the PHA Plan year? No <input checked="" type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	982		147
Extremely low income <=30% AMI	916	93.28%	
Very low income (>30% but <=50%	56	5.7%	

Housing Needs of Families on the Waiting List			
AMI)			
Low income (>50% but <80% AMI)	4	.44%	
Families with children	671	68.33%	
Elderly families	80	8.1%	
Families with Disabilities	80	8.15%	
Race/ethnicity-Black	899	91.55%	
Race/ethnicity White	80	8.15%	
Race/ethnicity-Asian	0	0%	
Race/ethnicity Other	3	.31%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	296	30.14%	
2 BR	471	47.96%	
3 BR	193	19.65%	
4 BR	19	1.9%	
5 BR	3	.03%	
5+ BR			
Is the waiting list closed (select one)? X No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No X 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.

Through analysis of the PHA's jurisdiction and waiting lists, the PHA believes that very low income families' and elderly persons are least well-served in the PHA's jurisdiction. The PHA intends, to the

maximum extent practicable, to address community housing needs. The PHA efforts over the next year will center on addressing affordability and supply or housing resources.

(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

- X Employ effective maintenance and management policies to minimize the number of public housing units off-line
- X Reduce turnover time for vacated public housing units
- X 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
- X Maintain or increase section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction
- X Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- X Maintain or increase section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- X Maintain or increase section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program
- X 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

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

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

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

Select all that apply

- Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing
- X 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
- X 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

- X Employ admissions preferences aimed at families who are working
- X 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

- X Seek designation of public housing for the elderly
- X 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
- X Apply for special-purpose vouchers targeted to families with disabilities, should they become available
- X 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 2004 grants)		
a) Public Housing Operating Fund	917,150	
b) Public Housing Capital Fund	3,043,665	
c) HOPE VI Revitalization	-0-	
d) HOPE VI Demolition	-0-	
e) Annual Contributions for Section 8 Tenant-Based Assistance	6,316,720	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	-0-	
g) Resident Opportunity and Self-Sufficiency Grants	13,000	
h) Community Development Block Grant	-0-	
i) HOME	-0-	
Other Federal Grants (list below)		
ROSS-Neighborhood Networks	81,532	Self-sufficiency training for adults & youths using computer
2. Prior Year Federal Grants (unobligated funds only) (list below)		
3. Public Housing Dwelling Rental Income	2,815,795	Public housing operations
4. Other income (list below)		
Program Generated	223,000	Public housing operations
4. Non-federal sources (list below)		

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
Investment Income	28,580	Public housing operations and supportive services
Investment Income	10,000	Section 8 supportive services
Total resources	13,449,442	

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: 3
 When families are within a certain time of being offered a unit: (state time)
 Other: (describe)

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

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

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

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

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

(2)Waiting List Organization

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

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

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

- X PHA main administrative office
- X 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? **8**

2. X 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? **6**

3. Yes X 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)?

- X PHA main administrative office
- X All PHA development management offices
- Management offices at developments with site-based waiting lists
- X 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

X Three or More

b.X 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 X 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)

X Emergencies

X Overhoused

X Underhoused

X Medical justification

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

Resident choice: (state circumstances below)

Other: (list below)

c. Preferences

1.X 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)

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

X Veterans and veterans' families

X Residents who live and/or work in the jurisdiction

- X Those enrolled currently in educational, training, or upward mobility programs
- X 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
- X Victims of reprisals or hate crimes
- X Other preference(s) (list below)
Elderly; Victims of Domestic Violence; Urgency of Need.

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

Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

- 1 Working families and those unable to work because of age or disability
- 2 Veterans and veterans' families
- 1 Residents who live and/or work in the jurisdiction
- 2 Those enrolled currently in educational, training, or upward mobility programs
- 3 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
- 3 Victims of reprisals or hate crimes
- Other preference(s) (list below)
Elderly (1); Victims of Domestic Abuse (2); Urgency of Need (1)

4. Relationship of preferences to income targeting requirements:

- X 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)

- X The PHA-resident lease

- X The PHA's Admissions and (Continued) Occupancy policy
- X 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
- X Any time family composition changes
- At family request for revision
- Other (list)

(6) Deconcentration and Income Mixing

a. X 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 X 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 X 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)

X 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)

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

LA6-7 Scattered Sites

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)

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

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

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

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

e. Indicate what kinds of information you share with prospective landlords? (select all that apply)

- Criminal or drug-related activity
 Other (describe below)

(2) Waiting List Organization

a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (select all that apply)

- None
 Federal public housing
 Federal moderate rehabilitation
 Federal project-based certificate program
 Other federal or local program (list below)

b. Where may interested persons apply for admission to section 8 tenant-based assistance? (select all that apply)

- PHA main administrative office
 Other (list below)

(3) Search Time

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

If yes, state circumstances below:
Extenuating circumstances

(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)
Victims of Domestic Abuse

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)

- 1 Working families and those unable to work because of age or disability
- 2 Veterans and veterans' families
- Residents who live and/or work in your jurisdiction
- 2 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)

- 2 Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- 1 Other preference(s) (list below)
Victims of Domestic Violence
4. Among applicants on the waiting list with equal preference status, how are applicants selected? (select one)
- X 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
- X 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)
- X The Section 8 Administrative Plan
- X 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?
- X 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)

X 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
X \$26-\$50

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

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

1) Family has lost eligibility or is awaiting an eligibility determination for Federal, State, or local assistance; 2) The family would be evicted as a result of the imposition of minimum rent requirements; 3) The income of the family has decreased because of changed circumstances, including: loss of employment; death in the family; other circumstances as determined by the PHA or HUD.

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

1. Yes X 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
- X 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
- X Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold)_\$10_____
- Other (list below)

g. Yes X 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.)

- X The section 8 rent reasonableness study of comparable housing
- Survey of rents listed in local newspaper
- X 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. In accordance with HUD regulations, and at the PHA's discretion, the Voucher Payment Standard amount is set by the PHA between 90 and 110 percent of the HUD published FMR. This is considered the basic range. The PHA reviews the appropriateness of the Payment Standard annually when the FMR is published and, at the same time, determine whether more than 40 percent of families in a particular unit size are paying more than 30% of their annual adjusted income for rent.

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

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

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

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

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

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

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

- Annually
- Other (list below)

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

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

(2) Minimum Rent

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

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

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

1) Family has lost eligibility or is awaiting an eligibility determination for Federal, State, or local assistance; 2) The family would be evicted as a result of the imposition of minimum rent requirement; 3) The income of the family has decreased because of changed circumstances, including: loss of employment; death in family; other circumstances as determined by the PHA or HUD.

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)

N/A

A. PHA Management Structure

Describe the PHA’s management structure and organization.

(select one)

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

B. HUD Programs Under PHA Management

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

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing		
Section 8 Vouchers		
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers (list individually)		
Public Housing Drug Elimination Program (PHDEP)		
Other Federal Programs(list individually)		

C. Management and Maintenance Policies

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

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

(2) Section 8 Management: (list below)

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

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

N/A

A. Public Housing

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

If yes, list additions to federal requirements below:

2. Which PHA office should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)
- PHA main administrative office
 - PHA development management offices
 - Other (list below)

B. Section 8 Tenant-Based Assistance

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

If yes, list additions to federal requirements below:

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

Other (list below)

7. Capital Improvement Needs

[24 CFR Part 903.7 9 (g)]

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

A. Capital Fund Activities

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

(1) Capital Fund Program Annual Statement

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

Select one:

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

-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. X 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:

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

-or-

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

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

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

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

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

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

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

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

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

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

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

2. Activity Description

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

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

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

[24 CFR Part 903.7 9 (i)]

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

1. Yes No: X 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.)

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

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

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

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

2. Activity Description

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

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

submitted or approved:

- Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: _____)
- Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: _____)
- Requirements no longer applicable: vacancy rates are less than 10 percent
- Requirements no longer applicable: site now has less than 300 units
- Other: (describe below)

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

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

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

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

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

2. Activity Description

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

Public Housing Homeownership Activity Description

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

B. Section 8 Tenant Based Assistance

1. X 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 X 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? 12/09/00

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)
ROSS	230	PHA Elderly Residents	Frances Tower at 300 Harrison and McKeen Plaza at 1500 McKeen	Public Housing Elderly Residents
HAK-IT After School Program	200 to 300	PHA Youth ages 6 to 16	Tri-District Boys and Girls Club locations including PHA sites	Public Housing
Homeownership, Inc. Training and Education Program	90 per year	Families desiring to become homeowners	Training takes place at MHA Main Office Downstairs Conference Room	Low-income families including Public Housing and Section 8.
Neighborhood Watch	120-200	PHA Residents	PHA Development Sites	Public Housing
ROSS-Neighborhood Network Center	174	PHA Residents-Adults & Youths	Miller Square at 4200 Matthews Street	Public Housing

(2) Family Self Sufficiency program/s

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2004 Estimate)	Actual Number of Participants (As of: 1/15/04)
Public Housing		
Section 8	95	107

- 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

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

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

LA 6-6, Burg Jones Lane (302 units); LA 6-9,8, 12, Robinson Place (211 units)
 LA 6-10, Miller Square (193 units); LA 6-2, 3, Johnson-Carver Terrace (223)
 LA 6-5, Foster Heights (175 units; LA 6-1, 4, George Breece/Louis Lock (150)

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)

- X Contracting with outside and/or resident organizations for the provision of crime- and/or drug-prevention activities
- X Crime Prevention Through Environmental Design
- X 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)

LA 6-6, Burg Jones Lane (302 units); LA 6-9,8, 12, Robinson Place (211 units)
 LA 6-10, Miller Square (193 units); LA 6-2,3, Johnson-Carver Terrace (223)

LA 6-5, Foster Heights (175 units; LA 6-1,4, George Breece/Louis Lock (150)

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)

- X Police involvement in development, implementation, and/or ongoing evaluation of drug-elimination plan
- X Police provide crime data to housing authority staff for analysis and action
- X Police have established a physical presence on housing authority property (e.g., community policing office, officer in residence)
- X Police regularly testify in and otherwise support eviction cases
- X Police regularly meet with the PHA management and residents
- X 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)

LA 6-6, Burg Jones Lane (302 units); LA 6-9,8, 12, Robinson Place (211 units)
LA 6-10, Miller Square (193 units); LA 6-2,3, Johnson-Carver Terrace (223)
LA 6-5, Foster Heights (175 units; LA 6-1,4, George Breece/Louis Lock (150)

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.

- X Yes No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- X Yes No: Has the PHA included the PHDEP Plan for FY 2004 in this PHA Plan?
- X Yes No: This PHDEP Plan is an Attachment. (Attachment Filename: D___)

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

MONROE HOUSING AUTHORITY PET POLICY

Families residing in a Public Housing unit are allowed to keep common household pets in their apartments as stated in their lease and in accordance with the Code of Federal Regulations. Families may request permission to keep a common household pet. Households may keep **only one** common household pet if it is registered with the Housing Authority before it is brought onto the premises, and if registration is updated each year at annual reexamination.

No vicious or intimidating animal or pet is to be kept on the premises.

The resident will be responsible for all reasonable expenses directly related to the presence of the animal or pet on the premises, including the cost of repairs and replacement in the apartment, and the cost of animal care facilities if needed. These charges are due and payable within 30 days of written notification

Payment

The PHA will charge a non-refundable fee of \$100 for each household with a pet (dog or cat). This fee is intended to cover the reasonable operating costs to the project.

The PHA will, in addition, charge a refundable pet deposit of \$200 each household with a pet (dog or cat). This fee is intended to cover additional costs otherwise covered.

The refundable pet deposit will be placed in an escrow account. The PHA will refund the unused portion of the deposit to the resident within a reasonable time after the resident moves from the project or no longer owns or has a pet present in the resident's dwelling unit.

Limitations

PHA authorization for a pet will be given on a year-by-year basis.

No pet will be allowed if weight exceeds 25 pounds, or 15 inches in height at full growth.

No dangerous animal or pet will be allowed. Dangerous pets or animals include, but are not limited to:

Birds of prey (birds such as canaries, parakeets, finch and other species that are normally kept in cages are permitted); poisonous or dangerous fish (permissible fish must be kept in tanks or aquariums not to exceed 20 gallons); dogs such as Pit Bulls or pit bull mix (suggested types of dogs include Chihuahuas, Pekinese, Toy Poodle, Schnauzer, Cocker Spaniel, Dachshund and Terriers; non-household cats (cats must be declawed or have scratching posts and should not exceed 15 pounds); rodents other than hamsters, gerbils, white rats or mice (these must be kept in appropriate cages); reptiles other than turtles or small lizards such as chameleons; exotic pets-at no time will the PHA approve exotic pets such as snakes, monkeys, game pets, etc.

Registration

Registration must include the following:

A certificate signed by a licensed veterinarian stating that the common household pet has received timely all inoculations currently required by state and local laws. Also required is whatever license is mandated by local law.

Name, address and phone number of person to be responsible for pet in resident's absence.

All animals are to be spayed or neutered. If animals are not spayed or neutered and have offspring, the resident household is in violation of this rule.

No animal or pet may be kept in violation of humane or health laws.

Information to identify the animal or pet and to demonstrate that it is an common household pet of reasonable size and demeanor.

The Housing Authority will notify the owner of the common household pet if registration of the pet is refused and will state the basis for the rejection, as size, disposition, etc.

Animal Restraint

A common household pet must be effectively restrained and under the control of a responsible person when passing through a common area, from the street to the apartment, etc. In high-rise elderly complexes household pets must be carried in common areas.

Sanitation Standards

Any animal or pet waste deposited in any animal or pet animal exercise area must be removed right away by the pet owner.

Residents will take adequate precautions to eliminate any animal or pet odors within or around the apartment and maintain the apartment in a sanitary condition at all times.

If a litter box is used in the apartment, it must be emptied at least every 2 days and contents placed in a heavy plastic bag into the garbage container immediately.

All common household pets are to be fed inside the apartment. Feeding is not allowed on porches, sidewalks, patios or other outside area.

Tenants are prohibited from feeding stray animals.

The feeding of stray animals will constitute having a pet without permission of the Housing Authority.

Residents will not alter their unit, patio or unit area to create an enclosure for a common household pet.

Potential Problems and Solutions

Residents will not permit any disturbances by their pets which would interfere with the quiet enjoyment of other tenants; whether by loud barking, howling, biting, scratching, chirping or other such activities.

The Housing Authority may enter the owner's apartment to inspect the premises when circumstances so warrant, to investigate a complaint that there is a violation, and/or to check on a nuisance or threat to health and safety of other residents.

The action may include also placing the pet in a facility to provide care and shelter for a period not to exceed 30 days.

If the pet is threatened by the incapacitation or death of the owner, (or by extreme negligence,) and the designated alternate is unwilling or unable to care for the pet, the Housing Authority may place the pet in proper facility for up to 30 days. If there is no other solution at the end of 30 days, the manager may donate the pet to a humane society. Cost of this professional care will be borne by the pet owner.

Excluded from the premises are all animals and/or pets not owned by residents, except for service animals.

The authorization for a common household pet may be revoked at any time subject to the Housing Authority's grievance procedure if the pet becomes destructive or a nuisance to others, or if the tenant fails to comply with this policy.

Residents who violate these rules are subject to:

Mandatory removal of the pet from the premises within 30 days of notice by the Housing Authority; or if for a threat to health and safety, removal within 24 hours of notice.

Lease termination proceedings.

This policy will be incorporated by reference into the Dwelling Lease signed by the resident, and therefore, violation of the above Policy will be grounds for termination of the lease.

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. X 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. X Yes No: Was the most recent fiscal audit submitted to HUD?
3. Yes X 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.

N/A

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. X 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)

X Provided below:

Comments dealt primarily with maintenance, physical improvements and safety issues. Resident Advisory Board members wanted the Community Policing Program to continue and, if possible expanded. Also, wanted to be sure that drug prevention programs for PHA youths be continued.

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

X Considered comments, but determined that no changes to the PHA Plan were necessary.

The PHA changed portions of the PHA Plan in response to comments
List changes below:

Other: (list below)

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

1. Yes X 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 X 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: City of Monroe
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)
- X The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
- X The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- X The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.

- X Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
1. Foster and maintain affordable housing
 2. Remove barriers to affordable housing

Other: (list below)

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

The City of Monroe is in support of the PHA Plan through its' commitment to foster and maintain affordable housing and to assist with the removal of barriers to affordable housing.

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.

Following attachments are submitted as separate files:

1. phaplans-LA48006va05; 2. phaplans-LA48006vb05; 3. phaplans-LA48006vc05;
4. phaplans-LA48006vd05; 5. phaplans-LA48006ve05.

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 LA48P00650104 FFY of Grant Approval: (04/2004)

X Original Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	
3	1408 Management Improvements	335,000
4	1410 Administration	297,000
5	1411 Audit	5,000
6	1415 Liquidated Damages	
7	1430 Fees and Costs	50,000
8	1440 Site Acquisition	
9	1450 Site Improvement	140,000
10	1460 Dwelling Structures	1,861,665
11	1465.1 Dwelling Equipment-Nonexpendable	50,000
12	1470 Nondwelling Structures	100,000
13	1475 Nondwelling Equipment	175,000
14	1485 Demolition	
15	1490 Replacement Reserve	
16	1492 Moving to Work Demonstration	
17	1495.1 Relocation Costs	30,000
18	1498 Mod Used for Development	
19	1502 Contingency	
20	Amount of Annual Grant (Sum of lines 2-19)	3,043,665
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	404,000
24	Amount of line 20 Related to Energy Conservation Measures	100,000

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
PHA Wide	Management Improvements	1408	335,000
PHA Wide	Administrative & Other Cost	1410	297,000
PHA Wide	Audit	411	5,000
PHA Wide	Fees & Costs	1430	50,000
PHA Wide	Security Fencing Update	1450	140,000
6-5 Foster Heights	Exterior & Interior Renovations	1460	1,057,000
6-5 Foster Heights	Park & Administrative	1470	100,000
6-1 G. Breece	Interior Renovations	1460	804,665
PHA Wide	Appliances	1465	50,000
PHA Wide	Trucks	1475	50,000
PHA Wide	Telephone System	1475	50,000
PHA Wide	Computer Upgrade	1475	75,000
6-5 Foster Heights	Relocation Costs	1495	30,000

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)
PHA Wide;Mgmt Improvements	7/04	6/05
PHA Wide;Admin.	7/04	6/05
PHA Wide;Audit	7/04	6/05
PHA Wide; Fees & Costs	7/04	6/05
PHA Wide-Sec Fencing	7/04	6/05
6-5 Ext.&Int.Renov.	7/04	6/05
6-5 Administrative & Recreation	7/04	6/05
6-1 Interior Renov.	7/04	6/05
PHA Wide; Appliances	7/04	6/05
PHA Wide; Trucks	7/04	6/05
PHA Wide; Tel.	7/04	6/05
Upgrade		
PHA Wide Computer	7/04	6/05
Upgrade		
6-4 ; Relocation Costs	7/04	6/05

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				

ADMISSIONS POLICY FOR DECONCENTRATION

(6) Deconcentration and Income Mixing

Effective beginning with PHAs with Fiscal year ends of October 2001.

Note: Do not respond to questions listed under sub-component (6) of the template. Instead, the following questions should be answered and included as a required attachment to the template.

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

If yes, list these developments as follows:

Development Name	Number of Units	Explanation (if any) [see step 4 at 903.2(c)(2)(iv)]	Deconcentration policy (if no explanation) [see step 5 at 903.2(c)(1)(v)]
LA 6-7 Scattered Sites	49	This complex's average income was 120.81% which is above the average income of all MHA family developments. This complex primarily consists of single family units and was completely renovated in 2002.	

J. DECONCENTRATION OF POVERTY AND INCOME-MIXING

The PHA's admission policy is designed to provide for deconcentration of poverty and income-mixing by bringing higher income tenants into lower income projects and lower income tenants into higher income projects.

Nothing in the deconcentration policy relieves the PHA of the obligation to meet the income targeting requirement.

Gross annual income is used for income limits at admission and for income-mixing purposes.

Deconcentration and Income-Mixing Goals

The PHA's deconcentration and income-mixing goal, in conjunction with the requirement to target at least 40 percent of new admissions to public housing in each fiscal year to "extremely low-income families", will be to admit families above the PHA's Established Income Range (EIR) to developments below the EIR, and families below the PHA's EIR to developments above the EIR.

Deconcentration Applicability

The PHA has covered developments (general occupancy, family developments) subject to the deconcentration requirement. These covered developments are described in the PHA Plan

Project Designation Methodology

Annually, the PHA will determine on an annual basis the average income of all families residing in general occupancy developments

The PHA will then determine the average income of all families residing in each general occupancy development.

The PHA will then determine whether each general occupancy development falls above, within or below the Established Income Range (EIR).

The EIR is 85 percent to 115 percent (inclusive of 85 percent and 115 percent) of the PHA-wide average income for general occupancy developments.

The PHA will then determine whether or not developments outside the EIR are consistent with local goals and strategies in the PHA Plan. Any deconcentration policy as needed is described in the PHA Plan.

Deconcentration Policy

If, at annual review, there are found to be development(s) with average income above or below the EIR, and where the income profile for a general occupancy development above or below the EIR is not explained or justified in the PHA Plan, the PHA shall list these covered developments in the PHA Annual Plan.

The PHA shall adhere to the following policies for deconcentration of poverty and income mixing in applicable developments:

Skipping a family on the waiting list or transfer list to reach another family in an effort to further the goals of the PHA's deconcentration policy:

If a unit becomes available at a development below the EIR, the first eligible family on the waiting list [or transfer list] with income above the EIR will be offered the unit. If that family refuses the unit, the next eligible family on the waiting list or transfer list with income above the EIR will be offered the

unit. The process will continue in this order. For the available unit at the development below the EIR, if there is no family on the waiting list or transfer list with income above the EIR, or no family with income above the EIR accepts the offer, then the unit will be offered to the first eligible family on the waiting list or transfer list in preference order regardless of income.

If a unit becomes available at a development above the EIR, the first eligible family on the waiting list or transfer list with income below the EIR will be offered the unit. If that family refuses the unit, the next eligible family on the waiting list or transfer list with income below the EIR will be offered the unit. The process will continue in this order. For the available unit at the development above the EIR, if there is no family on the waiting list [or transfer list] with income below the EIR, or no family with income below the EIR accepts the offer, then the unit will be offered to the first eligible family on the waiting list or transfer list in preference order regardless of income.

Skipping of families for deconcentration purposes will be applied uniformly to all families.

A family has the sole discretion whether to accept an offer of a unit made under the PHA's deconcentration policy. The PHA shall not take any adverse action toward any eligible family for choosing not to accept an offer of a unit under the PHA's deconcentration policy. However, the PHA shall uniformly limit the number of offers received by applicants and transfer families, described in this Chapter.

The PHA shall establish a preference for admission of working families in covered developments below the EIR.

The PHA shall offer incentives to families with incomes above the EIR willing to move into a development with average income below the EIR and/or to families with incomes below the EIR willing to move into a development with average income above the EIR willing to move into a development with average income above the EIR. These incentives are described in the PHA Plan.

Deconcentration Compliance

If, at annual review, the average incomes at all general occupancy developments are within the Established Income Range, the PHA will be considered to be in compliance with the deconcentration requirement.

CAPITAL FUND PROGRAM TABLES START HERE

Attachment B

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary					
PHA Name: Monroe Housing Authority		Grant Type and Number Capital Fund Program Grant No: LA48P00650104 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements Soft Costs	335,000			
	Management Improvements Hard Costs				
4	1410 Administration	297,000			
5	1411 Audit	5,000			
6	1415 Liquidated Damages				
7	1430 Fees and Costs	50,000			
8	1440 Site Acquisition				
9	1450 Site Improvement	140,000			
10	1460 Dwelling Structures	1,861,665			
11	1465.1 Dwelling Equipment—Nonexpendable	50,000			
12	1470 Nondwelling Structures	100,000			
13	1475 Nondwelling Equipment	175,000			
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	30,000			
18	1499 Development Activities				

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

PHA Name: Monroe Housing Authority	Grant Type and Number Capital Fund Program Grant No: LA48P00650104 Replacement Housing Factor Grant No:	Federal FY of Grant: 2004
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Original Annual Statement **Reserve for Disasters/ Emergencies** **Revised Annual Statement (revision no:)**
 Performance and Evaluation Report for Period Ending: **Final Performance and Evaluation Report**

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
19	1502 Contingency				
	Amount of Annual Grant: (sum of lines.....)	3,043,655			
	Amount of line XX Related to LBP Activities	-0-			
	Amount of line XX Related to Section 504 compliance	-0-			
	Amount of line XX Related to Security --Soft Costs	264,000			
	Amount of Line XX related to Security-- Hard Costs	140,000			
	Amount of line XX Related to Energy Conservation Measures	100,000			
	Collateralization Expenses or Debt Service				

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

PHA Name: Monroe Housing Authority		Grant Type and Number Capital Fund Program Grant No: LA48P00650104 Replacement Housing Factor Grant No:				Federal FY of Grant: 2004		
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	
PHA Wide	Management Improvements		1408		335,000			
PHA Wide	Administrative & Other Cost		1410		297,000			
PHA Wide	Audit		1411		5,000			
PHA Wide	Fees & Costs		1430		50,000			
PHA Wide	Security Fencing Upgrade		1450		140,000			
6-5 Foster Heights	Ext. & Int. Renovations Phase II		1460		1,057,000			
6-1 G. Breece	Interior Renovations		1460		804,665			
PHA Wide	Appliances		1465		50,000			
6-5 Foster Hts.	Park & Administrative		1470		100,000			
PHA Wide	Trucks		1475		50,000			
PHA Wide	Telephone System		1475		50,000			
PHA Wide	Computer Upgrade		1475		75,000			
6-5 Foster Heights	Relocation Costs		1495		30,000			
	Total				3,043,665			

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

PHA Name: Monroe Housing Authority		Grant Type and Number Capital Fund Program No: LA48P00650104 Replacement Housing Factor No:				Federal FY of Grant: 2004	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PHA Wide; Mgmt Imp.	7/04			6/05			
PHA Wide; Admin Cost	7/04			6/05			
PHA Wide; Audit	7/04			6/05			
PHA Wide; Fees & Cost	7/04			6/05			
PHA Wide-Sec. Fencing	7/04			6/05			
6-5 Ext. & Int. Renovate.	7/04			6/05			
6-1 Ext. & Int. Renovate.	7/04			6/05			
6-5 Admin. & Recreate.	7/04			6/05			
PHA Wide; Appliances	7/04			6/05			
PHA Wide; Trucks	7/04			6/05			
PHA Wide; Tel. Upgrade	7/04			6/05			
PHA Wide Comp Upgra	7/04			6/05			
6-5 Relocation Costs	7/04			6/05			

Attachment C

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

PHA Name Monroe Housing Authority		<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:			
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2005 PHA FY: 2005	Work Statement for Year 3 FFY Grant: 2006 PHA FY: 2006	Work Statement for Year 4 FFY Grant: 2007 PHA FY: 2007	Work Statement for Year 5 FFY Grant: 2008 PHA FY: 2008
PHA Wide-1408	Annual Statement	220,000	229,000	250,000	250,000
PHA Wide-1410		233,000	242,000	255,000	255,000
PHA Wide-1411		6,000	6,000	6,000	6,000
PHA Wide-1430		50,000	60,000	75,000	75,000
PHA Wide-1450		150,000	150,000	200,000	200,000
PHAWide-1460		2,184,665	2,056,665	1,947,665	1,962,665
PHA Wide-1465		50,000	50,000	100,000	100,000
PHA Wide-1470				115,000	
PHA Wide-1475		50,000	100,000	210,000	195,000
PHA Wide-1499		100,000	150,000		
Total CFP Funds (Est.)		3,043,665	3,043,665	3,043,665	3,043,665
Total Replacement Housing Factor Funds					

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year :_2____ FFY Grant:2005 PHA FY: 2005			Activities for Year: __3__ FFY Grant: 2006 PHA FY: 2006		
	Description	Estimated Quantity	Estimated Cost	Description	Estimated Quantity	Estimated Cost
	Management Improve.	PHA Wide	220,000	Management Improve.	PHA Wide	229,000
	Administration	PHA Wide	233,000	Administration	PHA Wide	242,000
See Annual	Audit Cost	PHA Wide	6,000	Audit Cost	PHA Wide	6,000
Statement	Fees & Cost	PHA Wide	50,000	Fees & Cost	PHA Wide	60,000
	Site Improvements	PHA Wide	150,000	Site Improvements	PHA Wide	150,000
	Interior/Exterior Renovations	PHA Wide	2,184,665	Interior/Exterior/Gym Renovations	PHA Wide	2,056,665
	Appliances	PHA Wide	50,000	Appliances	PHA Wide	50,000
	Trucks/Computer	PHA Wide	50,000	Trucks/Computer	PHA Wide	100,000
	New Development	PHA Wide	100,000	New Development	PHA Wide	150,000
			3,043,665			3,043,665

Activities for Year 1	Activities for Year :_4____ FFY Grant: 2007 PHA FY: 2007			Activities for Year: __5__ FFY Grant: 2008 PHA FY: 2008		
	Description	Estimated Quantity	Estimated Cost	Description	Estimated Quantity	Estimated Cost
	Management Improve.	PHA Wide	250,000	Management Improve.	PHA Wide	250,020
	Administration	PHA Wide	255,000	Administration	PHA Wide	255,000
See Annual	Audit Cost	PHA Wide	6,000	Audit Cost	PHA Wide	6,000
Statement	Fees & Cost	PHA Wide	75,000	Fees & Cost	PHA Wide	75,000
	Site Improvements	PHA Wide	200,000	Site Improvements	PHA Wide	200,000
	Interior/Exterior Renovations	PHA Wide	1,947,665	Interior/Exterior Renovations	PHA Wide	1,962,665
	Appliances	PHA Wide	100,000	Appliances	PHA Wide	100,000
	Office/Comm Room	PHA Wide	115,000			
	Trucks/Computer	PHA Wide	95,000	Trucks/Computer	PHA Wide	195,000
			3,043,665			3,043,665

Public Housing Drug Elimination Program Plan

A STATEMENT OF THE PHA'S SAFETY AND CRIME PREVENTION MEASURES

SAFETY AND CRIME PREVENTION PLAN

Goals and Objectives:

The goals and objectives of the PHA's Safety and Crime Prevention Plan reflect the PHA's Drug Elimination Program and the needs of the community. Goals and objectives are:

Examine the nature, frequency and severity of the overall safety, crime and drug problem in and around the PHA's public housing properties.

Conduct a resident survey of crime and safety issues.

Carefully analyze results of HUD's Resident Service and Satisfaction Survey.

Work with local law enforcement agencies to identify any gang involvement in and around the PHA's public housing properties and develop a gang abatement strategy.

Reduce crime in public housing developments to a level equal to or less than surrounding neighborhoods.

Reduce safety and crime problems in and around the PHA's public housing properties by 10% annually.

Identify at least 7 of public housing units for residency by a police officer.

Work with law enforcement to continue a community-policing program in and around the PHA's public housing properties.

Make physical improvements to enhance security. Resources to be applied include Capital Fund.

Provide after-school programs to youth.

Identify and secure sources of funding for resident initiatives programs.

The PHA plans to **continue** the following measures in order to ensure the continued safety of public housing residents:

The PHA shall involve resident in the identification of any potential or actual safety and security problems, the development of effective measures to prevent or resolve potential or actual problems, and feedback in monitoring effectiveness.

The PHA shall complete or abate all emergency work orders within 24 hours.

The PHA shall continue to handle after-hour emergency calls by utilizing an answering service and ensuring that key maintenance or property management staffs are on call at all times.

The PHA shall visit each development at least weekly in order to assess general condition of the development, including any potential safety and security problems.

The PHA shall check to ensure that all smoke detectors are operable each time any maintenance or management staff enters a unit.

The PHA shall charge \$15 to residents for the first offence for smoke detectors, where the smoke detector has been tampered with and made inoperable. For a second offense the PHA shall charge \$30 to the resident. The Public Housing lease and Admissions & Continued Occupancy Policy shall be properly amended.

The PHA promptly enforces the lease for the third offense for smoke detectors, where the smoke detector has been tampered with and made inoperable, by beginning the lease termination process. The Public Housing lease and Admissions & Continued Occupancy Policy shall be properly amended.

The PHA shall continue to conduct meetings at the developments, or groups of developments, with residents at least monthly. Safety and security issues shall be discussed.

The PHA shall publish a resident newsletter for all public housing residents at least 3 times a year. The PHA shall also continue to inform residents about monthly meetings in their development through flyers. Safety and security issues shall be discussed in the published newsletter and in the flyers.

The PHA distributes a resident survey of crime and safety issues.

The PHA plans to **continue** the following crime prevention activities:

The PHA shall involve resident in the identification of any potential or actual crime problems, the development of effective measures to prevent or resolve potential or actual problems, and feedback in monitoring effectiveness.

The PHA shall conduct after-hours inspections, to check outside lights, possible drug or gang activity and lease violations, which are conducted at least every 3 months.

The PHA shall ensure, as much as possible that outside lighting is adequate at each development.

The PHA shall make physical improvements as necessary to enhance security.

The PHA shall insure that all installed security screens and doors are in good repair at all family developments.

The PHA shall visit each development at least weekly in order to assess general condition of the development, including ensuring that no drug- or gang-related activity is occurring.

The PHA shall inspect vacant units weekly in order to ensure that vandalism, illegal entry, or use for illegal activities is not occurring.

Maintenance staff shall be trained to monitor for possible drug activity, gang activity, crime, and lease violations, including unauthorized persons residing in public housing. The PHA maintenance staff is crucial to lease enforcement since this staff is most frequently inside the units and at the developments. Maintenance staff shall report all suspected drug, gang or crime activity, and unauthorized persons, promptly to management staff for follow up.

The PHA shall conduct lease violation conferences and housing counseling sessions for all suspected lease violations, including those cited above. These conferences shall be documented in writing, with clear consequences of such lease violation, explained to the family.

The PHA recognizes the importance of identifying unauthorized persons in order to prevent drug and crime activity in its public housing units. In order to effectively monitor occupancy, the PHA shall strictly enforce visitor policy that states each public housing resident may have a visitor of no more than 14 days. After such time, unless prior PHA approval has been obtained, visitors shall be considered unauthorized and proper lease enforcement action shall be taken.

The PHA shall conduct meetings at the developments, or groups of developments, with residents at least monthly. Crime, gang and drug prevention measures, including the responsibility of residents to report activity, shall be discussed. The PHA shall publish a resident newsletter for all public housing residents at least 3 times a year. Issues such as drug, gang, and crime prevention will be discussed.

The PHA shall offer the following crime prevention programs:

After-school programs at all family developments.

Recreational programs adjacent to or at all family developments and in elderly developments.

Youth programs for youth in all family developments.

Neighborhood Watch programs at all family developments

The PHA plans to continue the following coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities:

The Monroe Police Department shall perform community-based policing at all PHA developments and surrounding neighborhoods.

The Monroe Police Department shall conduct drug, gang, and crime prevention presentations at all PHA developments with special emphasis on family developments.

The PHA shall supply the Monroe Police Department with information concerning any incident, evidence or crime-related lease violation at any public housing development.

The Monroe Police Department shall supply the PHA with information concerning any apprehension, incident or arrest at any public housing development.

The Monroe Police Department shall assist the PHA in enforcing the list of unauthorized persons 'banned' from public housing, due to suspected drug, gang, or crime-related activity, from entering public housing property at any public housing development.

The Monroe Police Department shall commit 6 to 8 police officers to ensure safety, security and anti-crime measures at all PHA developments and neighborhoods.

The PHA shall provide space for police substations (Neighborhood Centers) at the following developments: Burg Jones Lane, Miller Square and Robinson Place.

The PHA shall allow otherwise ineligible police officers (at least 7) to reside in public housing at all family developments.

The terms of tenancy of police officers include the following:

No rent will be charged. The police officer will provide 30 hours of volunteer work per month.

The security deposit will be waived.

A Federal, State, or local government must during the period of residence in public housing, employ the police officer on a full-time basis as a duly licensed professional police officer.

Following is the **excerpt** of need assessment contained in the PHA's Plan:

“Most of the Housing Authority's low income housing is located in the lower socioeconomic areas of Monroe. The majority of the developments are located within the Ouachita Enterprise Community. Approximately 50% of the population in the family housing complexes are under the age of 18 and susceptible to the influence of drugs.

There is no doubt that drugs and drug-related crimes in Housing Authority complexes have decreased since the formation of the "Jump Teams," Metro Narcotics and the law enforcement and prevention programs in previous Public Housing Drug Elimination Program Grants. However, ongoing problems that the Monroe Housing Authority is still experiencing include:

- Homicides
- Congregation of drug dealers/users
- Drug-related crimes
- Vandalism, especially cars
- Open Air Drug Markets
- Drug paraphernalia found on grounds and in units
- Lack of adequate lighting to discourage drug-related activities

The drug problems the Housing Authority is experiencing are controllable. However, if actions to control the problem are not continued in target areas, drug-related activities will continue to spiral and could again reach almost epidemic proportion”.

Following is the **summary** of goals and objectives contained in the PHA's Plan:

“The Monroe Housing Authority will continue operation "Weed & Seed" within a Community Policing Program as well as the "One Strike Your Out" program to attack the problems of drug-related crime. The Neighborhood Policing Center and Bicycle Patrols will continue to increase the interaction between police and

residents and improve public safety and quality of life in all Monroe Housing Authority developments. In addition, the Summer Youth Programs (City of Monroe Recreational Program and Tri-District Boys & Girls Club) will offer approximately 300 youth's alternatives to drugs and drug-related crime.”

Following is the **summary** of programs previously contained in the PHA’s PHDEP grants and will continue in the Agency Plan:

PROPOSED PLAN

The incidence of drug-related crimes must be reduced to improve the quality of life for Monroe's public housing residents. To achieve this reduction, services such as continuation of, community policing /neighborhood centers/ bike patrols, and youth programs are required.

As stated subsequently in this narrative, residents, local government and the community were involved in the planning, design, and implementation of this document.

All projects, LA 6-1 through LA 6-14, are included in the drug elimination program. Due to external drug infested areas nearby, some complexes will be targeted for more attention. The developments that will receive greater emphasis are:

- LA 6-6 Berg Jones Lane (302);
- LA 6-10 Miller Square (193);
- LA 6-5 Foster Heights (175 units);
- LA 6-9, 8, 12 Robinson Place (211 units);
- LA 6-2, 3 Johnson-Carver Terrace (223 units); and
- LA 6-1, 4 George Breece Manor and Louis Lock Homes (150)

MONROE HOUSING AUTHORITY

Attachment E

2003 CAPITAL FUND PROGRAM

PERFORMANCE AND EVALUATION REPORT

January 1, 2003 – December 31, 2003

A. USE OF CFP FUNDS

CFP and other funds are being disbursed in accordance with the needs identified in the Monroe Housing Authority's 5-Year & Annual Plans.

1. EMERGENCY NEEDS

There were no emergency expenditures during this reporting period.

2. DEVIATIONS WITHIN THE 10% CAP

There were no major changes that exceeded the 10% limitation. Work items were shifted from years one and two. The Monroe Housing Authority is operating under an approved Annual Statement covering a two-year period. The Housing Authority has also adopted the fungibility concept.

3. DEVIATIONS IN THE ORDER OF WORK BETWEEN YEAR 1 & 2

See – Capital Fund Program Tables.

4. ACTUAL FUND OBLIGATIONS AND EXPENDITURES

The actual fund obligations and expenditures as compared to the budgeted amounts in the most recently revised Annual Statement.

5. TARGET DATE PERFORMANCE (IMPLEMENTATION SCHEDULES)

Funds were obligated when they became available. Except for delayed items, the implementation schedule was followed as described in the original grant application.

B. RESIDENT & LOCAL GOVERNMENT COMMENT SUMMARY

All Monroe Housing Authority residents and Local Government Officials have been given an opportunity to comment on the 2003 CFP. Sample copies of meeting memorandums, notices, reports, and budgets are available for review at the Monroe Housing Authority Administrative Offices.

Most resident comments were made at scheduled monthly meetings or by telephone. Government Officials were kept informed and updated on the 2003 CFP on a non-scheduled basis. The Resident Advisory Committee met several times during the year and in their discussions included the 2003 Capital Fund Program.

Through the 2003 CFP, the Monroe Housing Authority addressed its' number one priority--safety, security and improving the quality of life for residents. The interior renovations of the 175 unit Foster Heights (LA 6-5) complex, relocation expenses, construction of Pavilion at Robinson Place (LA6-9) force account labor and materials, and several resident initiative programs are helping to make public housing developments a better place to live.

C. BOARD OF COMMISSIONERS RESOLUTION

The resolutions are submitted with the PHA Plans Certifications

CAPITAL FUND PROGRAM TABLES START HERE

Attachment E

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1:					
Summary					
PHA Name: Monroe Housing Authority		Grant Type and Number Capital Fund Program Grant No: LA48P00650103 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no: 1) X Performance and Evaluation Report for Period Ending: 1/1/03 to 12/31/03 Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				1/1/03-12/31/03
2	1406 Operations				
3	1408 Management Improvements Soft Costs	243,000	33,972	33,972	33,972
	Management Improvements Hard Costs				
4	1410 Administration	250,000	108,614	108,614	108,614
5	1411 Audit	5,000	5,000	5,000	
6	1415 Liquidated Damages				
7	1430 Fees and Costs	50,000	30,881	30,881	30,881
8	1440 Site Acquisition				
9	1450 Site Improvement	370,000	830,780	830,780	830,780
10	1460 Dwelling Structures	1,519,885	1,450,788	1,450,788	1,450,788
11	1465.1 Dwelling Equipment—Nonexpendable	50,000			
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				

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

PHA Name: Monroe Housing Authority	Grant Type and Number Capital Fund Program Grant No: LA48P00650103 Replacement Housing Factor Grant No:	Federal FY of Grant: 2003
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Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no: 1)
X Performance and Evaluation Report for Period Ending: 1/1/03 to 12/31/03 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
17	1495.1 Relocation Costs	50,000	77,850	77,850	77,850
18	1499 Development Activities				
19	1502 Contingency				
	Amount of Annual Grant: (sum of lines.....)	2,537,885	2,537,885	2,537,885	2,532,885
	Amount of line XX Related to LBP Activities				
	Amount of line XX Related to Section 504 compliance				
	Amount of line XX Related to Security –Soft Costs				
	Amount of Line XX related to Security-- Hard Costs				
	Amount of line XX Related to Energy Conservation Measures				
	Collateralization Expenses or Debt Service				

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

PHA Name: Monroe Housing Authority		Grant Type and Number Capital Fund Program No: LA48P00650103 Replacement Housing Factor No:				Federal FY of Grant: 2003	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PHA Wide; Mgmt Imp.	7/03		7/03	6/04	3/04		
PHA Wide; Admin Cost	7/03		7/03	6/04	3/04		
PHA Wide; Audit	7/03		7/03	6/04	3/04		
PHA Wide; Fees & Costs	7/03		7/03	6/04	3/04		
6-5 Exterior Renovation	7/03		7/03	6/05	3/04		
6-5 Interior Renovation	7/03		7/03	6/05	3/04		
6-5 Relocation Costs	7/03		7/03	6/05	3/04		