

Santa Fe Civic Housing Authority

PHA Plans

Annual Plan for Fiscal Year 2004

PHA Plan

Agency Identification

PHA Name: Santa Fe Civic Housing Authority

PHA Number: NM009

PHA Fiscal Year Beginning: 07/2004

Public Access to Information

Information regarding any activities outlined in this plan can be obtained by contacting:

Santa Fe Civic Housing Authority
Rudy R. Gallegos, Deputy Director (505-988-2859)

Display Locations for PHA Plans and Supporting Documents

The PHA Plans (including attachments) are available for public inspection at:

Santa Fe Civic Housing Authority
664 Alta Vista St.
Santa Fe, New Mexico

PHA Plan Supporting Documents are available for inspection at:

Santa Fe Civic Housing Authority
664 Alta Vista St.
Santa Fe, New Mexico

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

The SFCHA will place a high level of attention to improving the services for which it exists, providing safe and affordable housing for low income and very low income families. In doing so there are three major areas of concentration:

1. Budget and managements are high priority aspects of a new administration. We expect to optimize total funding, while increasing current efficiency levels resulting from dollars spent. We expect to set a “TEAM” initiative as we reassess current organizational structure and implement necessary realignment to improve our service level. In conjunction, we will be revisiting current policy and procedure to ascertain if changes will result in our full level of effectiveness. Management reports will be created (Hoping to optimize PIC system) and reviewed on a team basis to ensure increasing success levels.
2. The second major area of concern is the service requirement. We will be searching way to increase current unit availability while placing additional focus on the quality of service. We will set specific improvement levels for group of services provided such as maintenance, social services, resident coordination and self sufficiency efforts.
3. The third area, but certainly not the least, is unit availability. We will research and work on options to address highly depressed sites and we will also be optimizing total units per site. In addition, we hope to look for additional land for construction of new sites to address future growth.

We are fully aware of the challenges presented within these areas of concern. We also understand that with out a plan to the future we will remain in the past!

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Attachments

Required Attachments:

- Admissions Policy for De-concentration
- FY 2004 Capital Fund Program Annual Statement
- 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
- FY 2004 Capital Fund Program 5 Year Action Plan
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- Other (List below, providing each attachment name)

Supporting Documents Available for Review

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 (With 5 yr plan only)
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans (With 5 yr plan only)
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 (With 5 yr plan only)
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 De-concentration and Income Mixing Documentation: 1. PHA board certifications of compliance with de-concentration 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 de-concentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach	Annual Plan: Operations and Maintenance

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	infestation)	
X	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
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
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

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford- ability	Supply	Quality	Access- ability	Size	Locatio n
Income <= 30% of AMI	2,722	5	5	3	3	3	3
Income >30% but <=50% of AMI	2,644	4	4	3	3	3	3
Income >50% but <80% of AMI	4,056	3	2	2	2	2	2
Elderly	1,007	5	5	5	4	4	4
Families with Disabilities	3,800	5	5	4	4	3	3
Race/Ethnicity	Hisp.	5	5	5	4	3	3
Race/Ethnicity							
Race/Ethnicity							
Race/Ethnicity							

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

- Consolidated Plan of the Jurisdiction/s
Indicate year: 2003-2008
- 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

Housing Needs of Families on the Waiting List

Housing Needs of Families on the Waiting List

Waiting list type: (select one)

Section 8 tenant-based assistance

Public Housing

Combined Section 8 and Public Housing

Public Housing Site-Based or sub-jurisdictional waiting list (optional)

If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	1660		110
Extremely low income <=30% AMI	1305	79%	
Very low income (>30% but <=50% AMI)	212	13%	
Low income (>50% but <80% AMI)	74	4%	
Families with children	144	9%	
Elderly families	237	14%	
Families with Disabilities	339	20%	
Race/ethnicity/Hisp.	1185	71%	
Race/ethnicity/Whit	475	29%	
Race/ethnicity/Blk.	11	1%	
Race/ethnicity/NA	39	2%	

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

If yes:

How long has it been closed (# of months)? 3

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

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

Housing Needs of Families on the Waiting List

Housing Needs of Families on the Waiting List

Waiting list type: (select one)

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

If used, identify which development/sub-jurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	801		180
Extremely low income <=30% AMI	681	85%	
Very low income (>30% but <=50% AMI)	69	9%	
Low income (>50% but <80% AMI)	19	2%	
Families with children	13	2%	
Elderly families	81	10%	
Families with Disabilities	277	35%	
Race/ethnicity/Hisp.	543	66%	
Race/ethnicity/Whit	258	31%	
Race/ethnicity/Blk.	7	1%	
Race/ethnicity/NA	13	2%	

Characteristics by Bedroom Size (Public Housing Only)

1BR	504	63%	100
2 BR	192	24%	45
3 BR	102	13%	35
4 BR	3	.01%	0
5 BR	0	0%	
5+ BR	0	0%	

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

If yes:

How long has it been closed (# of months)? 3

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

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

C. Strategy for Addressing Needs

The SFCHA will enter into contractual agreements with a Consultant having expertise in low housing, HUD policy and requirements and with architects. In addition, a Capital Project Administrator has been hired to concentrate on both expansion and renovation. This Team will work with the Executive Director in defining options to increase housing that will commensurate with the needs requirement. The Team will include agencies with a relational interests as well as the City of Santa Fe.

(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:

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

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

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

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

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

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

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

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

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

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

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

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

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

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

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

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

Strategy 2: Conduct activities to affirmatively further fair housing

- 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

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2003 grants)		
a) Public Housing Operating Fund	\$804,221	Administration Operations
b) Public Housing Capital Fund	\$744,155	Modernization Management Improvements, Resident training Administration
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	\$3,962,780	Rental assistance Program Coordinator.
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	\$113,264	Security Drug Prevention Gang intervention
g) Resident Opportunity and Self- Sufficiency Grants	\$33,476	Salary Administration
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
2. Prior Year Federal Grants (un- obligated funds only) (list below)		
CFP 2003	\$442,103	
3. Public Housing Dwelling Rental Income	\$857,698	
4. Other income (list below)-Other	\$8,886	
Non-welling rent	\$9,390	
Interest	\$1,240	
4. Non-federal sources (list below)		
Total resources	\$6,977,213	

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

(1) Eligibility

- a. When does the PHA verify eligibility for admission to public housing? (Select all that apply)
- When families are within a certain number of being offered a unit: (state number)
 - When families are within a certain time of being offered a unit: (state time)
 - Other: (describe) when families are sent a letter stating their name has come up on the waiting list and they are required to bring in required documents.
- b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?
- Criminal or Drug-related activity
 - Rental history
 - Housekeeping
 - Other (describe)
- c. Yes No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- d. Yes No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- e. Yes No: Does the PHA access FBI criminal records from the FBI for screening purposes? (Either directly or through an NCIC-authorized source)

(2)Waiting List Organization

- a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply?)
- Community-wide list
 - Sub-jurisdictional lists
 - Site-based waiting lists
 - Other (describe)
- b. Where may interested persons apply for admission to public housing?
- PHA main administrative office
 - PHA development site management office
 - Other (list below)
- c. If the PHA plans to operate one or more site-based waiting lists in the coming year, answer each of the following questions; if not, skip to subsection **(3) Assignment**.

1. How many site-based waiting lists will the PHA operate in the coming year?
2. Yes No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD-approved site based waiting list plan)?
If yes, how many lists?
3. Yes No: May families be on more than one list simultaneously?
If yes, how many lists?
4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?
 - PHA main administrative office
 - All PHA development management offices
 - Management offices at developments with site-based waiting lists
 - At the development to which they would like to apply
 - Other (list below)

(3) Assignment

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

(4) Admissions Preferences

- a. Income targeting:
 - Yes No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?
- b. Transfer policies:
In what circumstances will transfers take precedence over new admissions? (List below)
 - Emergencies
 - Over-housed
 - Under-housed
 - Medical justification

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

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

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

Elderly

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

Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

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

Elderly

4. Relationship of preferences to income targeting requirements:

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

(5) Occupancy

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

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

b. How often must residents notify the PHA of changes in family composition?

(Select all that apply)

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

(6) De-concentration and Income Mixing

a. Yes No: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the

need for measures to promote de-concentration of poverty or income mixing?

b. Yes No: Did the PHA adopt any changes to its **admissions policies** based on the results of the required analysis of the need to promote de-concentration 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 de-concentration of poverty or income mixing goals at targeted developments
If selected, list targeted developments below:

De-concentration Policy for Covered Developments			
Development Name:	No of Units	Explanation (if any)	De-concentration Policy
NM009-1 (E)	30	Below EIR limit	Skipping over waiting or transfer list
NM009-1 (WA)	30	Below EIR limit	“
NM009-4 (GL)	25	Below EIR limit	“
NM009-9 (SL)	24	Above EIR limit	“

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

Other (list policies and developments targeted below)

d. Yes No: Did the PHA adopt any changes to other policies based on the results of the required analysis of the need for de-concentration 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 de-concentration of poverty and income-mixing
- Other (list below)

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

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

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

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

B. Section 8

(1) Eligibility

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

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

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

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

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

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

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

(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: Accommodation for just cause including written request for thirty day extension with a second 30 day extension upon written request.

(4) Admissions Preferences

a. Income targeting

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

b. Preferences

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

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

Former Federal preferences

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

Other preferences (select all that apply)

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

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

Date and Time

Former Federal preferences

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

Other preferences (select all that apply)

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

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

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

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

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

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

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

(5) Special Purpose Section 8 Assistance Programs

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

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

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

- Through published notices
- Other (list below)

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

(1) Income Based Rent Policies

a. Use of discretionary policies: (select one)

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

b. Minimum Rent

1. What amount best reflects the PHA’s minimum rent? (Select one)

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

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

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

- Death in the family
- Medical Reason

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

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

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

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

- For the earned income of a previously unemployed household member
- For increases in earned income
- Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

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

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

e. Ceiling rents

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

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

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

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

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

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

f. Rent re-determinations:

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

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

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

(2) Flat Rents

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

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

B. Section 8 Tenant-Based Assistance

(1) Payment Standards

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

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

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

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

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

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

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

- Annually
- Other (list below)

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

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

(2) Minimum Rent

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

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

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

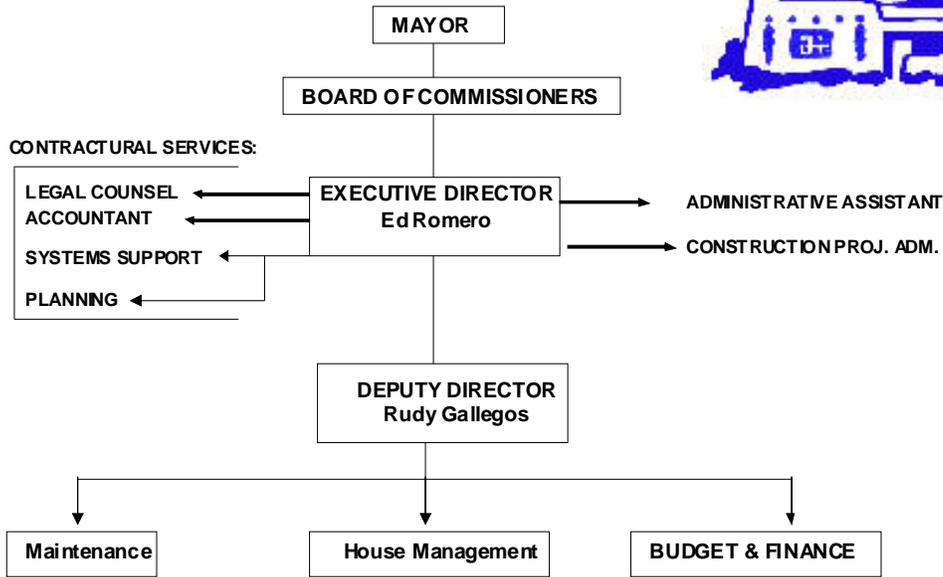
5. Operations and Management

[24 CFR Part 903.7 9 (e)]

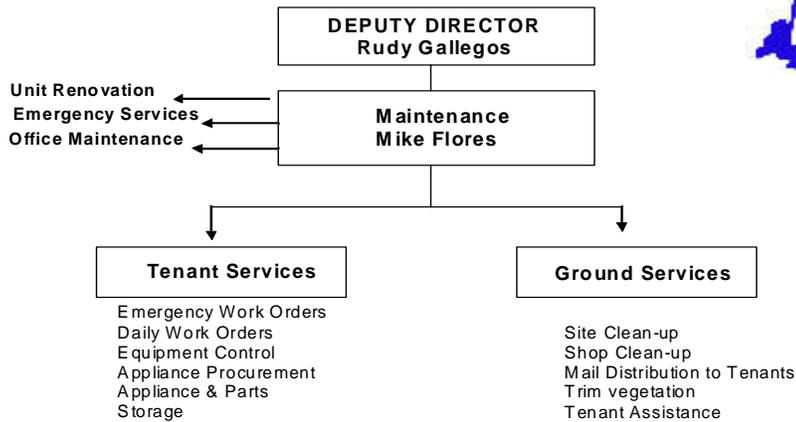
A. PHA Management Structure

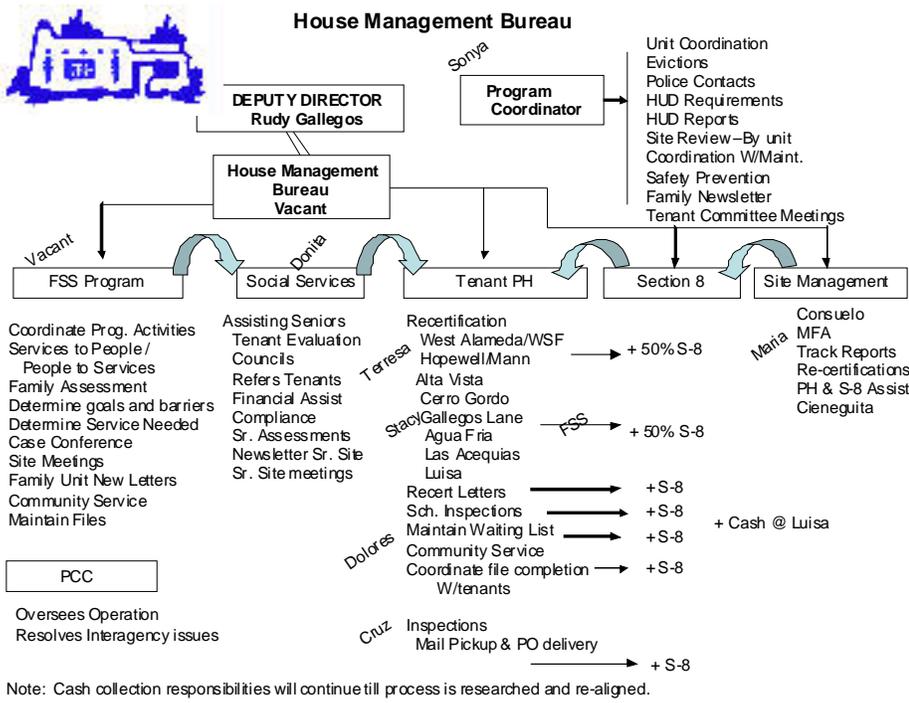
- An organization chart showing the PHA's management structure and organization is attached.

Santa Fe Civic Housing Authority

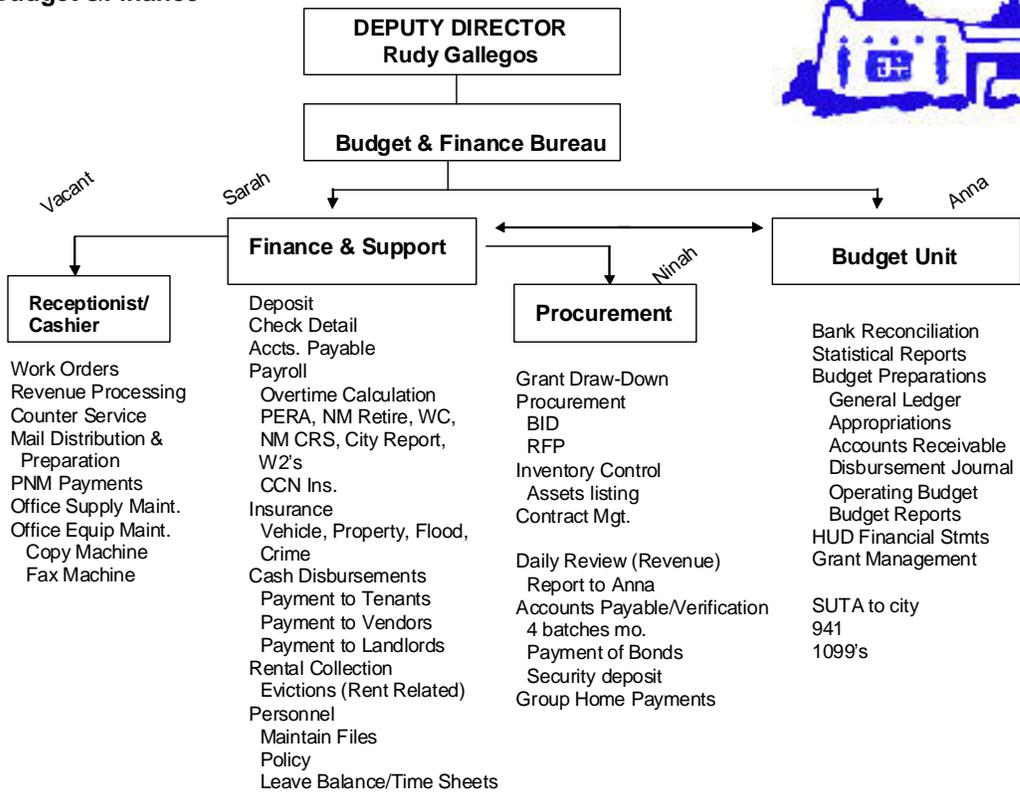


Maintenance Bureau





Budget & Finance



B. HUD Programs under PHA Management

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	461	105
Section 8 Vouchers	447	30
Section 8 Certificates	N/A	
Section 8 Mod Rehab	N/A	
Special Purpose Section 8 Certificates/Vouchers (list individually)	N/A	
Public Housing Drug Elimination Program (PHDEP)	195	0
Other Federal Programs(list individually)		

C. Management and Maintenance Policies

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

Please see the PHA’s Admissions and Continued Occupancy for management policies and the PHA’s Maintenance Policy Manual for procedures involving maintenance and pest eradication.

(2) Section 8 Management: (list below)

Please refer to the PHA’s currently adopted Administration Plan for Section 8

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

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)]

A. Capital Fund Activities

(1) Capital Fund Program Annual Statement

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

CAPITAL FUND PROGRAM TABLES START ON THE FOLLOWING PAGES

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

PHA Name: Santa Fe Civic Housing Authority	Grant Type and Number Capital Fund Program Grant No: NM02P00950104 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	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	\$100,000			
3	1408 Management Improvements	\$ 21,000			
4	1410 Administration	\$ 70,000			
5	1411 Audit	\$ 5,000			
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$ 30,000			
8	1440 Site Acquisition				
9	1450 Site Improvement	\$ 85,500			
10	1460 Dwelling Structures	\$282,000			
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 No dwelling Structures				
13	1475 No dwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	\$693,500			
22	Amount of Line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 Compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of line 21 Related to Security – Hand Costs				
26	Amount of line 21 Related to Energy Conservation				

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

PHA Name: Santa Fe Civic Housing Authority		Grant Type and Number Capital Fund Program Grant No: NM02P00950104 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
				Original	Revised	Funds Obligated	Funds Expended	
PHA – Wide	Operations		1406	100,000				
PHA – Wide	Staff Training		1408	5,000				
PHA – Wide	Resident Training		1408	5,000				
PHA – Wide	Printers/computer upgrades		1408	11,000				
	Subtotal			21,000				
PHA – Wide	Salaries		1410	70,000				
PHA – Wide	Audit		1411	5,000				
PHA – Wide	A/E Fees		1430	30,000				
PHA – Wide	Landscaping		1450	85,500				
PHA – Wide	Roofing		1460	100,000				
PHA – Wide	Windows/Floors		1460	100,000				
PHA – Wide	ADA		1460	52,000				
NM 9-7	Windows		1460	100,000				
NM 9-6	Tub Replacements		1460	30,000				
	Total			\$693,500				

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

PHA Name: Santa Fe Civic Housing Authority		Grant Type and Number Capital Fund Program No: NM02P00950104 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. Improvements	09/30/05							
PHA – Wide Administration	09/30/05							
NM 9-1	09/30/05			12/30/06				
NM 9-4	09/30/05			12/30/06				
NM 9-6	09/30/05			12/30/06				
NM 9-7	09/30/05			12/30/06				

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

- 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:

The SFCHA is in the initial stages of researching the options and requirements for mixed-finance development.

- 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:

The SFCHA is in the process of procuring consultant services to ascertain the viability of development additional housing, outside the realm of HUD funding. It is possible that a plan may be developed and commenced during the time frame for this plan.

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

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 –**The SFCHA does not have a thought out plan for renovation of the San Francisco & Alameda Site nor for the Hopewell and Mann Street Site but it has determined that units have deteriorated to a point where continued maintenance is more costly then demolition and rebuilding. A plan is expected to be framed in the short term, 6 months or so.**

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: San Francisco & Alameda/ Hopewell & Mann Street 1b. Development (project) number: NM 9-1
2. Activity type: Demolition <input checked="" type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date application approved, submitted, or planned for submission: <u>(TBD)</u>
5. Number of units affected: 104 @ SF/A plus 40 @ H/M
6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: TBD b. Projected end date of activity: TBD

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)]

1. Yes No: Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will apply for designation for occupancy by only elderly families or only families with disabilities, or by elderly families and families with disabilities as provided by section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year? (If “No”, skip to component 10. If “yes”, complete one activity description for each development, unless the PHA is eligible to

complete a streamlined submission; PHAs completing streamlined submissions may skip to component 10.)

2. Activity Description

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

Designation of Public Housing Activity Description	
1a. Development name:	Alta Vista
1b. Development (project) number:	NM=9-6
2. Designation type:	Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one)	Approved; included in the PHA’s Designation Plan <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission:	<u>(04/28/04)</u>
5. If approved, will this designation constitute a (select one)	<input type="checkbox"/> New Designation Plan <input checked="" type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected:	121
7. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

Designation of Public Housing Activity Description	
1a. Development name:	Villa Hermosa
1b. Development (project) number:	NM-9-7
2. Designation type:	Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one)	Approved; included in the PHA’s Designation Plan <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission:	<u>(04/28/04)</u>
5. If approved, will this designation constitute a (select one)	<input type="checkbox"/> New Designation Plan <input checked="" type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected:	116
7. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

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

1. Yes No: Have any of the PHA's developments or portions of developments been identified by HUD or the PHA as covered under section 202 of the HUD FY 1996 HUD Appropriations Act? (If "No", skip to component 11; if "yes", complete one activity description for each identified development, unless eligible to complete a streamlined submission. PHAs completing streamlined submissions may skip to component 11.)
2. Activity Description
 Yes No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If "yes", skip to component 11. If "No", complete the Activity Description table below.

Conversion of Public Housing Activity Description
1a. Development name: 1b. Development (project) number:
2. What is the status of the required assessment? <input type="checkbox"/> Assessment underway <input type="checkbox"/> Assessment results submitted to HUD <input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question) <input type="checkbox"/> Other (explain below)
3. <input type="checkbox"/> Yes <input type="checkbox"/> No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to block 5.)
4. Status of Conversion Plan (select the statement that best describes the current status) <input type="checkbox"/> Conversion Plan in development <input type="checkbox"/> Conversion Plan submitted to HUD on: (DD/MM/YYYY) <input type="checkbox"/> Conversion Plan approved by HUD on: (DD/MM/YYYY) <input type="checkbox"/> Activities pursuant to HUD-approved Conversion Plan underway
5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one) <input type="checkbox"/> Units addressed in a pending or approved demolition application (date submitted or approved: <input type="checkbox"/> Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved:) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved:) <input type="checkbox"/> Requirements no longer applicable: vacancy rates are less than 10 percent <input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units <input type="checkbox"/> Other: (describe below)

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

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

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

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

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

2. Activity Description

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

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

B. Section 8 Tenant Based Assistance

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

2. Program Description:

a. Size of Program

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

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

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

b. PHA-established eligibility criteria

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

If yes, list criteria below:

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (l)]

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? 07/01/03

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

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

- Joint administration of other demonstration program
- Other (describe)

B. Services and programs offered to residents and participants

(1) General

a. Self-Sufficiency Policies

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

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

b. Economic and Social self-sufficiency programs

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

Services and Programs				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)
<i>Family Self Sufficiency.</i>	<i>50</i>	<i>Random</i>	<i>Main Office</i>	<i>Both</i>

(2) Family Self Sufficiency program/s

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2000 Estimate)	Actual Number of Participants (As of: 06/30/02)
Public Housing	25	25
Section 8		15

- 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)]

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

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

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

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

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

3. Which developments are most affected? (List below)
 NM9-1, and NM9-4

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

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

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

2. Which developments are most affected? (List below)
 NM9-1, and NM9-4

C. Coordination between PHA and the police

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

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

D. Additional information as required by PHDEP/PHDEP Plan

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

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

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

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

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

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

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

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

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

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

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

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

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

3. In what manner did the PHA address those comments? (Select all that apply)
 - Considered comments, but determined that no changes to the PHA Plan were necessary.
 - The PHA changed portions of the PHA Plan in response to comments
List changes below:
 - Other: (list below)

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

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

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

3. Description of Resident Election Process

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

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

b. Eligible candidates: (select one)

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

c. Eligible voters: (select all that apply)

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

C. Statement of Consistency with the Consolidated Plan

1. Consolidated Plan jurisdiction: (provide name here)

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

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

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

The Consolidated Plan for Housing and Community Development was prepared for the years 2001 – 2005 and supports SFCHA 5 year plan. This is because the consolidated plan is actually a three-part planning process required by HUD. It comprises developing a three to five year strategic plan, preparing annual action plans and submitted annual performance reports.

These three parts furnish the framework whereby New Mexico can identify its housing, homeless, community, and economic development needs. It also identifies resources that will be tapped and actions to be taken that will address the needs and to tools to evaluate and measure the state's progress toward achieving its strategic goals.

The New Mexico Planning Team gather and review a considerable body of data that is used to plan and allocate resources to meet some of the same goals and objectives that HUD has. HUD focus on the following four priorities: expanding homeownership, especially among minorities; improving access to affordable housing, free from discrimination; strengthening communities, with a special focus on ending chronic homelessness; fall in line with the objectives of this Authority and in the utilization of the information within this plan.

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D. Other Information Required by HUD

Chapter 4

Santa Fe Civic Housing Authority, Inc.

Resolution 2004 – 004

TENANT SELECTION AND ASSIGNMENT PLAN

(Includes Preferences and Managing the Waiting List)

[24 CFR 960.203, 960.204, 960.205, 960.206]

INTRODUCTION

It is the PHA's policy that each applicant shall be assigned an appropriate place **on a jurisdiction-wide waiting list.**

1. Applicants will be listed in sequence based upon:
 - a. date and time the application is received,
 - b. the size and type of unit they require,
 - c. **and factors of preference.**
2. In filling an actual or expected vacancy, the SFCHA will offer the dwelling unit to an applicant in the appropriate sequence, **with the goal of accomplishing de-concentration of poverty and income-mixing objectives.** The SFCHA will offer the unit until it is accepted. This Chapter describes the PHA's policies with regard to the number of unit offers that will be made to applicants selected from the waiting list.

PHA's Objectives

PHA policies will be followed consistently and will affirmatively further HUD's fair housing goals.

1. It is the PHA's objective to ensure that families are placed in the proper order on the waiting list so that the offer of a unit is not delayed to any family unnecessarily or made to any family prematurely. This chapter explains the policies for the management of the waiting list.
2. **When appropriate units are available, families will be selected from the waiting list in their preference-determined sequence.**
3. By maintaining an accurate waiting list, the SFCHA will be able to perform the activities which ensure that an adequate pool of qualified applicants will be available to fill unit

vacancies in a timely manner. Based on the PHA's turnover and the availability of appropriate sized units, groups of families will be selected from the waiting list to form a final eligibility "pool." Selection from the pool will be based on completion of verification.

A. MANAGEMENT OF THE WAITING LIST

The SFCHA will administer its waiting list as required by 24 CFR Part 5, Part 945 and Part 960, Subparts A and B. The waiting list will be maintained in accordance with the following guidelines:

1. The application will be a permanent file.
2. All applicants in the pool will be maintained **in order of date and time of application receipt**.
3. Applications equal in preference will be maintained by **date and time sequence**.
4. All applicants must meet applicable income eligibility requirements as established by HUD.

Opening and Closing the Waiting Lists

1. The PHA, at its discretion, may restrict application intake, suspend application intake, and close waiting lists in whole or in part.
2. The decision to close the waiting list will be based on the number of applications available for a particular size and type of unit, and the ability of the SFCHA to house an applicant in an appropriate unit within a reasonable period of time.
3. When the SFCHA opens the waiting list, the SFCHA will advertise through public notice in the following newspapers, minority publications and media entities. location(s), and program(s) for which applications are being accepted in the local paper of record, "minority" newspapers, and other media including: the Santa Fe New Mexican.
4. To reach persons with disabilities, the SFCHA will provide separate notice to local organizations representing the interests and needs of the disabled. **This will include notice to the following organizations: St. Elizabeth's Shelter and La Luz Shelter.**

The notice will contain:

- a. The dates, times, and the locations where families may apply.
- b. The programs for which applications will be taken.
- c. A brief description of the program.

- d. Limitations, if any, on who may apply.
5. The notices will be made in an accessible format if requested. They will provide potential applicants with information that includes the SFCHA address and telephone number, how to submit an application, information on eligibility requirements.
6. Upon request from a person with a disability, additional time will be given as an accommodation for submission of an application after the closing deadline. This accommodation is to allow persons with disabilities the opportunity to submit an application in cases when a social service organization provides inaccurate or untimely information about the closing date.

When Application Taking is Suspended

1. **The SFCHA may suspend the acceptance of applications if there are enough local Preference holders to fill anticipated openings for the next 12 months.**
2. The waiting list may not be closed if it would have a discriminatory effect inconsistent with applicable civil rights laws.
3. During the period when the waiting list is closed, the SFCHA **will not** maintain a list of individuals who wish to be notified when the waiting list is open.
4. The open period shall be long enough to achieve a waiting list adequate to cover projected turnover over the next **12 months. The SFCHA will give at least three days' notice prior to closing the list.** When the period for accepting applications is over, the SFCHA will add the new applicants to the list by:
 - a. **Separating the new applicants into groups based on preference unit size and ranking applicants within each group by date and time of application.**
 - b. **Unit size, and/or date and time of application receipt.**

The SFCHA will update the waiting list **at least annually** by removing the names of those families who are no longer interested, no longer qualify for housing, or cannot be reached by mail or telephone. At the time of initial intake, the SFCHA will advise families of their responsibility to notify the SFCHA when mailing address or telephone numbers change.

Reopening the List

If the waiting list is closed and the SFCHA decides to open the waiting list, the SFCHA will publicly announce the opening.

1. Any reopening of the list is done in accordance with the HUD requirements.

Limits on Who May Apply

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When the waiting list is open,

1. **Any family asking to be placed on the waiting list for Public Housing rental assistance will be given the opportunity to complete an application.**
2. When the application is submitted to the PHA:
 - a. **It establishes the family's date and time of application for placement order on the waiting list.**

Multiple Families in Same Household

When families apply that consist of two families living together, (such as a mother and father, and a daughter with her own husband or children), if they apply as a family unit, they will be treated as a family unit.

B. WAITING LIST PREFERENCES

A preference does not guarantee admission to the program. Preferences are used to establish the order of placement on the waiting list. Every applicant must meet the PHA's Selection Criteria as defined in this policy.

The PHA's preference system will work in combination with requirements to match the characteristics for the family to the type of unit available, including units with targeted populations, and further de-concentration of poverty in public housing. When such matching is required or permitted by current law, the SFCHA will give preference to qualified families.

Families who reach the top of the waiting list will be contacted by the SFCHA to verify their preference and, if verified, the SFCHA will complete a full application for occupancy. Applicants must complete the application for occupancy and continue through the application processing and may not retain their place on the waiting list if they refuse to complete their processing when contacted by the PHA.

Among applicants with equal preference status, the waiting list will be organized by **date and time**.

Local Preferences

1. **The SFCHA uses the following Local Preferences:**
 - a. **Date and time of receipt of a completed application.**
 - b. **Families with Incomes Needed to Achieve Deconcentration of Poverty and Income-Mixing: for families with incomes needed to achieve deconcentration of poverty and income-mixing goals.**

Treatment of Single Applicants

- 1. Single applicants will be treated as any other eligible family on the SFCHA waiting list.**

C. ORDER OF SELECTION FOR GENERAL OCCUPANCY (FAMILY) DEVELOPMENTS

The SFCHA has established the following local admissions preferences for general occupancy (family) developments:

Date and time of receipt of a completed application only.

D. ORDER OF SELECTION FOR MIXED POPULATION DEVELOPMENTS

A mixed population project is a public housing project, or portion of a project that was reserved for elderly families and disabled families at its inception (and has retained that character).

- 1. In accordance with the 1992 Housing Act, elderly families whose head spouse or sole member is at least 62 years of age, and disabled families whose head, co-head or spouse or sole member is a person with disabilities, will receive equal preference to such units.**
- 2. No limit will be established on the number of elderly or disabled families that may occupy a mixed population property. All other SFCHA preferences will be applied.**
- 3. The SFCHA has established the following local admissions preferences for Mixed Population developments. Per HUD regulations, equal preference must be given to Elderly Families and Disabled Families:**

EXAMPLE A

First Priority: Elderly families or disabled families

E. VERIFICATION OF PREFERENCE QUALIFICATION

The family may be placed on the waiting list upon their certification that they qualify for a preference. When the family is selected from the waiting list for the final determination of eligibility, the preference will be verified.

- 1. The SFCHA will re-verify a preference claim, if the SFCHA feels the family's circumstances have changed, at time of selection from the waiting list.**
- 2. If the preference verification indicates that an applicant does not qualify for the preference, the applicant will be returned to the waiting list and ranked without the Local Preference and given an opportunity for a review.**

Change in Circumstances

Changes in an applicant's circumstances while on the waiting list may affect the family's entitlement to a preference. Applicants are required to notify the SFCHA in writing when their circumstances change. When an applicant claims an additional preference, s/he will be placed on the waiting list in the proper order of their newly-claimed preference.

F. PREFERENCE DENIAL

If the SFCHA denies a preference, the applicant will be placed on the waiting list without benefit of the preference.

1. The SFCHA will notify the applicant in writing of the reasons why the preference was denied and offer the applicant an opportunity for **an informal meeting**. The applicant will have five working days to request the meeting **in writing**. If the preference denial is upheld as a result of the meeting, or the applicant does not request a meeting, the applicant will be placed on the waiting list without benefit of the preference. Applicants may exercise other rights if they believe they have been discriminated against.
2. **Any applicant who falsifies documents or makes false statements in order to qualify for any preference will be removed from the waiting list with notification to the family.**

G. FACTORS OTHER THAN PREFERENCES THAT AFFECT SELECTION OF APPLICANTS

1. Before applying its preference system, the SFCHA will first match the characteristics of the available unit to the applicants available on the waiting lists. Factors such as unit size, accessible features, deconcentration or income mixing, income targeting, or units in housing designated for the elderly limit the admission of families to those characteristics that match the characteristics and features of the vacant unit available.
2. By matching unit and family characteristics, it is possible that families who are lower on the waiting list may receive an offer of housing ahead of families with an earlier date and time of application.

H. INCOME TARGETING

The SFCHA will monitor its admissions to ensure that at least 40 percent of families admitted to public housing in each fiscal year shall have incomes that do not exceed 30% of area median income of the PHA's jurisdiction.

1. **Hereafter families whose incomes do not exceed 30% of area median income will be referred to as "extremely low income families."**
2. The SFCHA shall have the discretion, at least annually, to exercise the "fungibility"

provision of the QHWRA by admitting less than 40 percent of “extremely low income families” to public housing in a fiscal year, to the extent that admissions of extremely low income families to the PHA's voucher program during a SFCHA fiscal year exceeds the 75 percent minimum targeting requirement for the PHA's Section 8 Voucher Program. This fungibility provision discretion by the SFCHA is also reflected in the PHA's Administrative Plan.

3. The fungibility credits will be used to drop the annual requirement below 40 percent of admissions to public housing for extremely low income families by the lowest of the following amounts:
 - a. The number of units equal to 10 percent of the number of newly available vouchers in the fiscal year; or
 - b. The number of public housing units that 1) are in public housing projects located in census tracts having a poverty rate of 30% or more, and 2) are made available for occupancy by and actually occupied in that year by, families other than extremely low-income families.
4. The Fungibility Floor: Regardless of the above two amounts, in a fiscal year, at least 30% of the PHA's admissions to public housing will be to extremely low-income families. The fungibility floor is the number of units that cause the PHA's overall requirement for housing extremely low-income families to drop to 30% of its newly available units.
5. **Fungibility shall only be utilized if the SFCHA is anticipated to fall short of its 40% goal for new admissions to public housing.**

Low Income Family Admissions

The SFCHA will admit only families whose incomes do not exceed 80% of the HUD approved area median income.

I. UNITS DESIGNATED FOR THE ELDERLY

1. **In accordance with the 1992 Housing Act, elderly families with a head, spouse sole member at least 62 years of age will receive a preference for admission to such units or buildings covered by a HUD-approved Allocation Plan, except for the units which are accessible, which may be offered to persons with disabilities.**
2. **The SFCHA will take the following action when processing families for developments designated for the elderly:**
 - a. **When there are insufficient elderly families who wish to reside in a development, near-elderly families (head or spouse ages 50-61) receive a preference for this type of unit.**

- b. **Families with members who require a unit with accessible features will receive preference for such units over families who do not require such features.**

Procedure to Be Used When There Are Insufficient Applicants on the List

1. **Where the SFCHA anticipates that there are insufficient elderly or near-elderly families on the waiting list for these units the SFCHA will notify local senior service centers and local media sources aimed at the elderly to recruit elderly families for the waiting list for these projects.**

J. UNITS DESIGNATED FOR THE DISABLED

1. In accordance with the 1992 Housing Act, disabled families with a head, spouse or sole member who qualifies as a person with disabilities as defined in 24 CFR 945.105 will receive a preference for admission to units that are covered by a HUD-approved Allocation Plan.
2. **The SFCHA has units designed for persons with mobility, sight and hearing impairments (referred to as accessibility units). These units were designed and constructed specifically to meet the needs of persons requiring the use of wheelchairs and persons requiring other modifications.**
3. **Preference for occupancy of these units will be given to families with disabled family members who require the modifications or facilities provided in the units.**

K. DECONCENTRATION OF POVERTY AND INCOME-MIXING

1. The PHA's admission policy is designed to provide for de-concentration of poverty and income-mixing by bringing higher income tenants into lower income projects and lower income tenants into higher income projects.
2. Nothing in the de-concentration policy relieves the SFCHA of the obligation to meet the income targeting requirement.
3. Gross annual income is used for income limits at admission and for income-mixing purposes.

Deconcentration and Income-Mixing Goals

1. 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

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

Project Designation Methodology

1. Annually, the SFCHA will determine the average income of all families residing in general occupancy developments
2. The SFCHA will then determine the average income of all families residing in each general occupancy development.
3. The SFCHA will then determine whether each general occupancy development falls above, within or below the Established Income Range (EIR).
4. 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.
5. If a covered development is both below the 30 percent area-wide median and above the 115 percent income average for PHA-wide covered developments, it will be considered to be within the EIR.
6. The SFCHA will then determine whether or not developments outside the EIR are consistent with local goals and strategies in the SFCHA Plan. Any de-concentration policy as needed is described in the SFCHA 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 SFCHA Plan, the SFCHA shall list these covered developments in the SFCHA Annual Plan.

The SFCHA shall adhere to the following policies for de-concentration of poverty and income mixing in applicable developments:

1. **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.

2. **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.**
3. **A family has the sole discretion whether to accept an offer of a unit made under the PHA's deconcentration policy. The SFCHA 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 SFCHA shall uniformly limit the number of offers received by applicants [and transfer families], described in this Chapter.**
 - a. **The SFCHA shall target investment and capital improvements toward covered developments below the EIR to encourage applicant families whose income is above the EIR to accept units in those developments. These improvements are described in the SFCHA Plan.**

De-concentration Compliance

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

L. PROMOTION OF INTEGRATION

1. Beyond the basic requirement of nondiscrimination, SFCHA shall affirmatively further fair housing to reduce racial and national origin concentrations.
2. The SFCHA shall not require any specific income or racial quotas for any development or developments.
3. A SFCHA shall not assign persons to a particular section of a community or to a development or building based on race, color, religion, sex, disability, familial status or national origin for purposes of segregating populations

M. OFFER OF PLACEMENT ON THE SECTION 8 WAITING LIST

1. **The SFCHA will not merge the waiting lists for public housing and Section 8. However, if the Section 8 waiting list is open when the applicant is placed on the public housing list, the SFCHA must offer to place the family on both lists. If the**

public housing waiting list is open at the time an applicant applies for Section 8, the SFCHA must offer to place the family on the public housing waiting list.

N. REMOVAL FROM WAITING LIST AND PURGING

1. The waiting list will be purged **annually** by a mailing to all applicants to ensure that the waiting list is current and accurate. The mailing will ask for current information and confirmation of continued interest.
2. If an applicant fails to respond within 15 calendar days, s/he will be removed from the waiting list. If a letter is returned by the Post Office without a forwarding address, the applicant will be removed without further notice, and the envelope and letter will be maintained in the file.
3. If a letter is returned with a forwarding address, it will be re-mailed to the address indicated.
4. If an applicant is removed from the waiting list for failure to respond, they will not be entitled to reinstatement unless a person with a disability requests a reasonable accommodation for being unable to reply within the proscribed period;
5. **Notices will be made available in accessible format upon the request of a person with a disability. An extension to reply to the purge notification will be considered as an accommodation if requested by a person with a disability.**
6. **The SFCHA allows a grace period of fifteen days after completion of the purge. Applicants who respond during this grace period will be reinstated.**
7. **The SFCHA will give written notification to all applicants who fail to respond at the required times. If they fail to respond to this notification, they will be removed from the waiting list.**
8. **Applicants are notified with confirmation of the PHA's receipt of their application that they are responsible for notifying the SFCHA within 15 calendar days, if they have a change of address.**

O. OFFER OF ACCESSIBLE UNITS

1. The SFCHA has units designed for persons with mobility, sight and hearing impairments, referred to as accessible units.
2. No non-mobility impaired families will be offered these units until all eligible mobility-impaired applicants have been considered.
3. Before offering a vacant accessible unit to a non-disabled applicant, the SFCHA will offer such units:

- a. First, to a current occupant of another unit of the same development, or other public housing developments under the PHA's control, who has a disability that requires the special features of the vacant unit.
 - b. Second, to an eligible qualified applicant on the waiting list having a disability that requires the special features of the vacant unit.
4. When offering an accessible/adaptable unit to a non-disabled applicant, the SFCHA will require the applicant to agree to move to an available non-accessible unit within 30 days when either a current resident or an applicant needs the features of the unit and there is another unit available for the applicant. This requirement will be a provision of the lease agreement.
5. **The SFCHA will make modifications to the unit in keeping with the Section 504 Transition Plan as the need arises and until the agency determines that an adequate number of units have been rehabilitated in numbers sufficient to evidence compliance with the Plan. After such point in time, the SFCHA may approve the family's plan to make physical modifications at the family's expense and consistent with the terms of the Authority's 504 Plan as it relates to tenant modifications.**

See "Leasing" chapter.

P. PLAN FOR UNIT OFFERS

1. The SFCHA plan for selection of applicants and assignment of dwelling units to assure equal opportunity and non-discrimination on grounds of race, color, sex, religion, or national origin is:
- a. **Plan "A". (2 to 3 offer plan). Under this plan, the SFCHA will determine how many locations within its jurisdiction have available units of suitable size and type in the appropriate type of project. Plan A is based on the distribution of vacancies. If a suitable unit is available in:**
 - 1. **Two locations: The applicant must be offered a suitable unit in the location with the higher number of vacancies. If the offer is rejected, a final offer will be made at the other location.**
 - 2. **If more than one unit of the appropriate type and size is available, the first unit to be offered will be the first unit that is ready for occupancy.**
 - 3. The SFCHA will maintain a record of units offered, including location, date and circumstances of each offer, each acceptance or rejection, including the reason for the rejection.

Q. CHANGES PRIOR TO UNIT OFFER

Changes that occur during the period between removal from the waiting list and an offer of a suitable unit may affect the family's eligibility or Total Tenant Payment. The family will be notified in writing of changes in their eligibility or level of benefits and offered their right to an informal hearing when applicable (See Chapter on Complaints, Grievances, and Appeals)

R. APPLICANT STATUS AFTER FINAL UNIT OFFER

1. When an applicant rejects the final unit offer the SFCHA will **remove the applicant's name from the waiting list.**
2. Removal from the waiting list means **the applicant must reapply.**

S. TIME-LIMIT FOR ACCEPTANCE OF UNIT

Applicants must accept a unit offer within two working days of the date the offer is made. Offers made over the telephone will be confirmed by letter. If unable to contact an applicant by telephone, the SFCHA will send a **letter**.

Applicants Unable to Take Occupancy

If an applicant is willing to accept the unit offered, but is unable to take occupancy at the time of the offer for "*good cause*," the applicant will not be **removed from the waiting list**.

Examples of "*good cause*" reasons for the refusal to take occupancy of a housing unit include, but are not limited to:

- a. An elderly or disabled family makes the decision not to occupy or accept occupancy in designated housing. [24 CFR 945.303(d)]
- b. **Inaccessibility to source of employment or children's day care such that an adult household member must quit a job, drop out of an educational institution or a job training program;**
- c. **Presence of lead paint in the unit offered when the applicant has children under the age specified by current law;**
- d. **The family demonstrates to the PHA's satisfaction that accepting the offer will result in a situation where a family member's life, health or safety will be placed in jeopardy. The family must offer specific and compelling documentation such as restraining orders, other court orders, or risk assessments related to witness protection from a law enforcement agency. The reasons offered must be specific to the family. Refusals due to the location of the unit alone are not considered to be good cause.**

- e. **A qualified, knowledgeable, health professional verifies the temporary hospitalization or recovery from illness of the principal household member, other household members, or a live-in aide necessary to care for the principal household member.**
- f. **The unit is inappropriate for the applicant's disabilities.**

Applicants With a Change in Family Size or Status

- 1. **Changes in family composition, status, or income between the time of the interview and the offer of a unit will be processed. The SFCHA shall not lease a unit to a family whose occupancy will overcrowd or underutilize the unit.**

T. REFUSAL OF OFFER

- 1. If the unit offered is inappropriate for the applicant's disabilities, the family will retain their position on the waiting list.
- 2. **If the unit offered is refused for other reasons, the SFCHA will follow the applicable policy as listed in the "Plan for Unit Offers" section and the "Applicant Status After Final Offer" section.**

CAPITAL FUND PROGRAM TABLES START HERE

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Santa Fe Civic Housing Authority, Inc.		Grant Type and Number Capital Fund Program Grant No: NM02P00950101 Replacement Housing Factor Grant No:			Federal FY of Grant: 2001
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 12/31/03 <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	\$ 0	\$ 145,000.00	\$145,000.00	67,195.41
3	1408 Management Improvements	27,500.00	47,500.00	47,500.00	34,824.35
4	1410 Administration	62,000.00		62,000.00	34,521.69
5	1411 Audit	5,000.00			
6	1415 Liquidated Damages				
7	1430 Fees and Costs	25,000.00		7,468.13	7,468.13
8	1440 Site Acquisition				
9	1450 Site Improvement	145,000.00		93,889.27	5,938.59
10	1460 Dwelling Structures	449,326.00	268,926.00	268,926.00	268,926.00
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	22,600.00	38,000.00	38,000.00	38,000.00
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collaterization or Debt Service				

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

PHA Name: Santa Fe Civic Housing Authority, Inc.	Grant Type and Number Capital Fund Program Grant No: NM02P00950101 Replacement Housing Factor Grant No:	Federal FY of Grant: 2001
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Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending: 12/31/03 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	\$736,426.00		662,783.40	457,471.51
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: Santa Fe Civic Housing Authority, Inc		Grant Type and Number Capital Fund Program Grant No: NM02P00950101 Replacement Housing Factor Grant No:				Federal FY of Grant: 2001		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA – Wide	Operations	1406		0	145,000	145,000	67,195.41	Pending
PHA – Wide	Staff Training	1408		4,000				
PHA – Wide	Resident Training	1408		15,000				
PHA – Wide	Printers/Computers	1408		28,500				
	SUBTOTAL			47,500			34,824.69	Pending
PHA – Wide	Support Staff/ Admin.	1410		62,000				
PHA – Wide	Audit	1411		5,000				
PHA – Wide	A/E Fees	1430		25,000			7,468.13	Pending
NM 9-1	Xeri-scaping	1450		20,000				
NM 9-4	Block wall perimeter fencing	1450		85,000				
NM 9-6	Xeri-scaping	1450		20,000				
PHA – Wide	Interior Refurbishing (doors, floors, etc.)	1460		66,000	100,609			
NM 9-4	HVAC Replacement	1460		120,000	70,000			
NM 9-7	HVAC Replacement	1460		116,717	64,317			
PHA – Wide	Water Heater Replacement	1460		34,000				

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

PHA Name: Santa Fe Civic Housing Authority, Inc.		Grant Type and Number Capital Fund Program No: NM02P00950101 Replacement Housing Factor No:				Federal FY of Grant: 2001	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PHA –Wide Mgmt. Improvements	09/30/02	06/27/03		06/30/04			
PHA – Wide Administration	09/30/02	06/27/03		06/30/04			
NM 9-1	09/30/02	06/27/03		06/30/04			
NM 9-4	09/30/02	06/27/03		06/30/04			
NM 9-6	09/30/02	06/27/03		06/30/04			
NM 9-7	09/30/02	06/27/03		06/30/04			

CAPITAL FUND PROGRAM TABLES START HERE

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Santa Fe Civic Housing Authority, Inc.		Grant Type and Number Capital Fund Program Grant No: NM02P00950102 Replacement Housing Factor Grant No:			Federal FY of Grant: 2002
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 12/31/03 <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	\$ 20,000.00		\$ 20,487.41	\$ 4,884.00
4	1410 Administration	56,000.00			
5	1411 Audit	5,000.00			
6	1415 Liquidated Damages				
7	1430 Fees and Costs	26,000.00			
8	1440 Site Acquisition				
9	1450 Site Improvement	36,000.00			
10	1460 Dwelling Structures	400,144.00		36,515.74	36,515.74
11	1465.1 Dwelling Equipment—Nonexpendable	23,000.00			
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				

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

PHA Name: Santa Fe Civic Housing Authority, Inc.	Grant Type and Number Capital Fund Program Grant No: NM02P00950102 Replacement Housing Factor Grant No:	Federal FY of Grant: 2002
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending: 12/31/03
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	566,144.00		57,003.15	41,399.74
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance	50,000.00			
24	Amount of line 21 Related to Security – Soft Costs	80,000.00			
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: Santa Fe Civic Housing Authority, Inc.		Grant Type and Number Capital Fund Program Grant No: NM02P00950102 Replacement Housing Factor Grant No:				Federal FY of Grant: 2002		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA – Wide	Staff Training	1408		4,500				Pending
PHA - Wide	Resident training	1408		5,500		20,487.41	4,884	Pending
PHA - Wide	Printers/computer upgrades	1408		10,000				Pending
PHA - Wide	Salaries	1410		56,000				Pending
PHA - Wide	Audit	1411	1	5,000				“
PHA - Wide	A/E Fees	1430		26,000				“
NM 9-1	Xeri-scaping	1450		9,000				Pending
NM 9-4	Xeri-scaping	1450		9,000				“
NM 9-6	Xeri-scaping	1450		9,000				“
NM 9-7	Xeri-scaping	1450		9,000				“
NM 9-1	HVAC Replacement	1460		216,000		36,514.74	36,515.74	Pending
NM 9-4	Replacement Flooring	1460		126,000				“
NM 9-6	Flooring Improvements	1460		30,000				“
NM 9-7	Flooring Improvements	1460		28,144				“
PHA - Wide	Appliances (30 Ranges 30 Fridges)	1465		23,000				“
	Total			566,144		57,003.15	41,399.74	

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

PHA Name: Santa Fe Civic Housing Authority, Inc.		Grant Type and Number Capital Fund Program No: NM02P00950102 Replacement Housing Factor No:				Federal FY of Grant: 2002	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PHA –Wide Mgmt. Improvement	09/30/03						
PHA – Wide Administration	09/30/03						
NM 9-1	09/30/03		12/30/04				
NM 9-4	09/30/03		12/30/04				
NM 9-6	09/30/03		12/30/04				
NM 9-7	09/30/03		12/30/04				

CAPITAL FUND PROGRAM TABLES START HERE

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Santa Fe Civic Housing Authority, Inc.		Grant Type and Number Capital Fund Program Grant No: NM02P00950103 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:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 12/31/03 <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	\$ 58,947.00			
3	1408 Management Improvements	29,473.00			
4	1410 Administration	58,947.00			
5	1411 Audit	3,000.00			
6	1415 Liquidated Damages				
7	1430 Fees and Costs	58,947.00			
8	1440 Site Acquisition				
9	1450 Site Improvement	180,000.00			
10	1460 Dwelling Structures	160,157.00			
11	1465.1 Dwelling Equipment—Nonexpendable	40,000.00			
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collaterization or Debt Service				

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

PHA Name: Santa Fe Civic Housing Authority, Inc.	Grant Type and Number Capital Fund Program Grant No: NM02P00950103 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:)
 Performance and Evaluation Report for Period Ending: 12/31/03
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	\$589,471.00			
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: Santa Fe Civic Housing Authority, Inc.		Grant Type and Number Capital Fund Program Grant No: NM02P00950103 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA – Wide	Staff Training	1408		5,000				
PHA – Wide	Resident Training	1408		5,000				
PHA - Wide	Printers/computer upgrades	1408		11,000				
PHA - Wide	Salaries	1410		70,000				
PHA - Wide	Audit	1411		5,000				
PHA - Wide	A/E Fees	1430		25,000				
NM 9-6	Storage Facility Remodel	1450		12,000				
NM 9-7	Rest Areas (Patios)	1450		24,500				
NM 9-1	Roofing	1460		34,250				
NM 9-4	Roofing	1460		34,250				
NM 9-6	Roofing	1460		34,250				
NM 9-7	Roofing	1460		102,000				
NM 9-6	Tub replacements	1460		102,000				
NM 9-7	Tub Replacements	1460		95,000				
NM 9-7	Security Wall Improvements	1460						

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

PHA Name: Santa Fe Civic Housing Authority, Inc.	Grant Type and Number Capital Fund Program No: NM02P00950103 Replacement Housing Factor No:	Federal FY of Grant: 2003
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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. Improvements	09/30/04						
PHA – Wide Administration	09/30/04						
NM 9-1	09/30/04			12/30/05			
NM 9-4	09/30/04			12/30/05			
NM 9-6	09/30/04			12/30/05			
NM 9-7	09/30/04			12/30/05			

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

Activities for Year 1	Activities for Year: <u>2005</u> FFY Grant: <u>2004</u> PHA FY: <u>6/30/2005</u>			Activities for Year: <u>2006</u> FFY Grant: <u>2005</u> PHA FY: <u>6/30/2006</u>		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See Annual Statement	NM9-4	1460-FLOORING	\$100,000.00	NM9-9	1460-ROOFING	\$90,000.00
	NM9-7	1460-BATH REMODEL	80,000.00	NM9-7	1460-BATH REMODEL	80,000.00
	NM9-4	1460-ROOFING	90,000.00	NM9-4	1450-PARKING	90,000.00
				NM9-7	1460-KITCH REMODEL	100,000.00
	NM9-4	1450-PARKING LOTS	100,000.00			
	VARIOUS	1408-MGT IMPROVEME	25,000.00	VARIOUS	1470-STOVES/REFRIG	50,000.00
	VARIOUS	1475-VEHICLE REPLAC	25,000.00	VARIOUS	1475-VEHICLE REPLAC	25,000.00
	VARIOUS	1410-ADMIN	70,000.00	VARIOUS	1410-ADMIN	70,000.00
	VARIOUS	1411-AUDIT	6,000.00	VARIOUS	1411-AUDIT	6,000.00
	VARIOUS	1430-FEES	30,000.00	VARIOUS	1430-FEES	30,000.00
	VARIOUS	1406-OPERATIONS	80,000.00	VARIOUS	1406-OPERATIONS	80,000.00
	VARIOUS	1450-LANDSCAPING	90,000.00	VARIOUS	1450-LANDSCAPING	90,000.00

Capital Fund Program Five-Year Action Plan

Part I: Summary

PHA Name SANTA FE CIVIC HOUSING AUTHORITY		<input checked="" type="checkbox"/> Original 5-Year <input type="checkbox"/> Revision No.			
Development Number/Name/HA- Wide	Year 1	Work Statement for Year 2 FFY Grant: 2005 PHA FY: 6/30/2004	Work Statement for Year 3 FFY Grant: 2006 PHA FY: 6/30/2005	Work Statement for Year 4 FFY Grant: 2007 PHA FY: 6/30/2006	Work Statement for Year 5 FFY Grant: 2008 PHA FY: 6/30/2007
	Annual Statement				
NM9-1				300,000.00	
NM--4		290,000.00	90,000.00		120,000.00
NM9-6				100,000.00	
NM9-7		80,000.00	180,000.00		
NM9-9			90,000.00		
VARIOUS		326,000.00	351,000.00	350,000.00	656,000.00
CFP Funds Listed for 5-year planning		696,000.00	711,000.00	750,000.00	776,000.00
Replacement Housing Factor Funds					