

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

Portage Metropolitan Housing Authority

5 Year Plan for Fiscal Years 2004 - 2008
Annual Plan for Fiscal Year 2004

Approved by PMHA Board: September 25, 2003

Approved by HUD:

**PHA Plan
Agency Identification**

PHA Name: Portage Metropolitan Housing Authority

PHA Number: OH031

PHA Fiscal Year Beginning: 01/2004

Public Access to Information

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

- Main administrative office of the PHA
- PHA development management offices
- PHA local offices

Display Locations For PHA Plans and Supporting Documents

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

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

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

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

5-YEAR PLAN
PHA FISCAL YEARS 2004 - 2008
[24 CFR Part 903.5]

A. Mission

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

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- The PHA's mission is:* The Portage Metropolitan Housing Authority is dedicated to meeting the housing needs of low-income families and individuals of Portage County by developing, managing and supporting decent affordable housing in partnership with community agencies.

B. Goals

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

Portage MHA's Agency Goals and 5 Year Objectives are following the HUD goals.

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

- PHA Goal: Expand the supply of assisted housing
Objectives:
- Apply for additional rental vouchers:
 - Reduce public housing vacancies:
 - Leverage private or other public funds to create additional housing opportunities:
 - Acquire or build units or developments
 - Other (list below)
- PHA Goal: Improve the quality of assisted housing
Objectives:
- Improve public housing management: (PHAS score)
 - Improve voucher management: (SEMAP score)
 - Increase customer satisfaction:
 - Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections)
 - Renovate or modernize public housing units:

- Demolish or dispose of obsolete public housing:
- Provide replacement public housing:
- Provide replacement vouchers:
- Other: (list below)
- PHA Goal: Increase assisted housing choices
 - Objectives:
 - Provide voucher mobility counseling:
 - Conduct outreach efforts to potential voucher landlords
 - Increase voucher payment standards
 - Implement voucher homeownership program:
 - Implement public housing or other homeownership programs:
 - Implement public housing site-based waiting lists:
 - Convert public housing to vouchers:
 - Other: (list below)

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

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

(See consolidated list of PMHA Goals and 5 Year Objectives at the end of this section)

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

- PHA Goal: Promote self-sufficiency and asset development of assisted households
 - Objectives:
 - Increase the number and percentage of employed persons in assisted families:
 - Provide or attract supportive services to improve assistance recipients' employability:
 - Provide or attract supportive services to increase independence for the elderly or families with disabilities.
 - Other: (list below)

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

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

Other PHA Goals and Objectives: (list below)

PMHA AGENCY GOALS

1. Efficiently, effectively operate agency-housing programs, while being sensitive to the needs and concerns of participants, landlords, and the community.
2. Respond to local housing needs by developing new affordable housing opportunities for low-income households and improving resource utilization.
3. Enhance the quality of life of the PMHA's residents, with particular emphasis upon promotion of family self-sufficiency.

5 YEAR OBJECTIVES

1. Efficiently, effectively operate agency housing programs, while being sensitive to the needs and concerns of participants, landlords, and the community.
 - A. Ensure efficient, effective, responsive Section 8 administration
 1. Achieve and maintain SEMAP High Performer status
 2. Maximize the effectiveness of the program for applicants and participants
 3. Maximize the efficiency of the program
 4. Recruit new landlords
 - B. Ensure efficient, effective, responsive public housing administration
 1. Maintain PHAS High Performer status
 2. Maximize the efficiency and effectiveness of housing management
 3. Maximize the efficiency of maintenance
2. Respond to local housing needs by developing new affordable housing opportunities for low-income households and improving resource utilization.

- A. Develop affordable housing using HUD and non-HUD sources
 - 1. Expand the supply of permanent, affordable housing, for the low-to moderate-income population in a variety of geographic areas.
 - 2. Preserve the inventory of privately owned permanent, affordable rental housing for the general low-income population.
 - 3. Develop affordable housing with supportive services for special needs populations.

- B. Use Public Housing and Section 8 resources to meet local identified housing needs
 - 1. Maximize Section 8 lease-up rate.
 - 2. Monitor Tenant Preference Policy to meet identified housing needs.
 - 3. Identify alternative uses for developments having marketing issues.

3. Enhance the quality of life of the PMHA's residents, with particular emphasis upon promotion of family self-sufficiency.

- A. Increase self-sufficiency rate in public housing.
 - 1. Ensure policies encourage and support family responsibility.
 - 2. Encourage on-site supportive services.
 - 3. Use housing as an incentive for self-sufficiency progress.
 - 4. Seek out and pursue appropriate grant opportunities.

- B. Increase employment rate of Section 8 and public housing families.
 - 1. Provide incentives for tenants to generate higher income.
 - 2. Provide job training and work through PMHA maintenance/construction needs.

Annual strategies are located in "Statement of Housing Needs," part C, "Strategy for Addressing Needs"

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

Note, although PMHA has prepared a Streamlined Plan, information regarding sections omitted from this Plan, including maintenance procedures, housing management procedures, grievance procedures, and resident programs, is on display in PMHA's central repository and available for public inspection.

Troubled Agency Plan

ii. Executive Summary of the Annual PHA Plan

[24 CFR Part 903.7 9 (r)]

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

The Portage Metropolitan Housing Authority (PMHA) Annual Plan format is guided by two designations awarded to PMHA. The Annual Plan follows the streamlined version due to the PMHA's HUD designation as a High Performer. The Plan is also modified by PMHA's acceptance under HUD's demonstration program known as Moving to Work (MTW). The PMHA is one of 24 national demonstration sites for a new program known locally as Portage HOPES (Housing Opportunities Promoting Economic Self-Sufficiency). This designation provides PMHA the opportunity to evaluate and modify HUD regulations, flexibility to design programs to meet local needs and conditions, and the opportunity to combine funds from different programs.

Portage HOPES is characterized by modified program regulations, particularly those related to rent calculations, in order to promote employment by housing participants. In addition, PMHA's housing inventory will be used as a reward for participants making economic progress. Supportive services and homeownership opportunities will further complement efforts to assist residents to become self-sufficient.

The year 2004 poses a challenge for PMHA, as the MTW Agreement between the PMHA and HUD expires in March 2004. It is hoped that HUD will grant the PMHA its requested extension, so that the MTW policies and procedures can continue. If this is the case, the PMHA will continue to refine the policies developed under the MTW program.

However, if HUD does not grant a MTW time extension, 2004 will be a year of dramatic transition for staff and participants. Major program changes in both Section 8 and public housing have taken place under existing HUD programs during the course of the five years that the PMHA has administered its MTW program. As the average PMHA participant is only in PMHA housing for 2 years, most current tenants have not experienced any regulations except for those implemented under MTW. For example, tenants and staff will be unfamiliar with Housing Choice Vouchers and the flat rent feature of public housing. Having to transition to new program requirements will be a mammoth undertaking for both residents and staff.

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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

Table of Contents

	<u>Page #</u>
Annual Plan	
i. Annual Plan Type	1
ii. Executive Summary	1
iii. Table of Contents	2
1. Housing Needs	7
A. Portage County Households	7
B. Waiting List Households-	
Section 8	8
Public Housing	9
C. Year 2004 Strategy	10
2. Financial Resources	16
3. Policies on Eligibility, Selection and Admissions	17
A. Public Housing	17
B. Section 8	22
4. Rent Determination Policies	26
A. Public Housing	26
B. Section 8	29
5. Operations and Management Policies	N/A*
6. Grievance Procedures	N/A*
7. Capital Improvement Needs	32
8. Demolition and Disposition	33
9. Designation of Housing	34
10. Conversions of Public Housing	35
11. Homeownership	N/A*
12. Community Service Programs	N/A*
13. Crime and Safety	41
14. Pets	N/A*
15. Civil Rights Certifications (included with PHA Plan Certifications)	43
16. Audit	43
17. Asset Management	N/A*
18. Other Information	44
A. Resident Board Recommendations	44
B. Board Participants	44
C. Consistency with Consolidated Plan	45

***Not applicable due to High Performer Status**

Attachments

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

Required Attachments:

- Admissions Policy for Deconcentration
- FY 2004 Capital Fund Program Annual Statement
- 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 2000 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)

List of Attachments:

- A:** *Deconcentration Policy*
- B:** *2004 Capital Fund Annual Statement & Five-Year Capital Fund Plan*
- C:** *Progress in Meeting 5-Year Plan Mission and Goals*
- D:** *Resident Advisory Board Comments*
- E:** *Membership of the Resident Advisory Board*
- F:** *Resident Membership of the PHA Governing Board*
- G:** *RASS Follow-Up Plan*
- H:** *Voluntary Conversion Initial Assessment*
- I:** *MTW Rent Change for Earned Income Disregard for Section 8 Disabled Adults*
- J:** *50102 2002 PE*
- K:** *50101 2001 PE*
- L:** *50100 2000 PE*

Supporting Documents Available for Review

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

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	Administrative Plan	
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <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
N/A	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
Attachment To Plan	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
N/A	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
N/A	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
N/A	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
N/A	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
N/A	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
N/A	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 (PHDEP) 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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
N/A	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)
X	Moving To Work Plan	MTW Implementation Plan
X	Pet Policy for Seniors and Pet Policy for Families	Supporting Documents Binder
X	Maintenance Procedures and Tenant Charges	Annual Plan: Operations/Management
X	PMHA Descriptive Information	Supporting Documents Binder
X	Resident Program Descriptions and Partnership Agreements	Annual Plan: Self-Sufficiency
X	Resident Satisfaction Survey Follow-up Plan	Supporting Documents Binder
X	2002 Public Housing Assessment System Report	Supporting Documents Binder

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

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

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

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	4,132	5	5	5	2	3	3
Income >30% but <=50% of AMI	3,021	4	5	5	2	3	3
Income >50% but <80% of AMI	3,704	2	3	4	2	3	3
Elderly	1,875	3	3	3	2	1	3
Families with Disabilities	1,006	3	3	4	4	2	4
Black non-Hispanic	733	4	5	5	2	3	3
Hispanic	95	4	5	5	2	3	3
Race/Ethnicity	N/A	N/A	N/A	N/A	N/A	N/A	N/A

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

- Consolidated Plan of the Jurisdiction/s
Indicate year:
- 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:
Portage County Comprehensive Housing Strategies, CHAS Table 1C for Portage County and Portage County Regional Planning Commission interpolation of 1990 Census data, adjusted per Community 2020 Projections for 2002

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover #Notified 08/02-07/03
Waiting list total	1,721		1,340
Extremely low income <=30% AMI	1,525	88.6%	
Very low income (>30% but <=50% AMI)	194	11.3%	
Low income (>50% but <80% AMI)	1	0.1%	
Families with children	1,200	69.7%	
Elderly families	66	3.8%	
Families with Disabilities	347	20.2%	
White	1,221	70.9%	
African American	428	24.9%	
Hispanic	16	0.9%	
Asian/Pacific Islander	5	0.4%	
American Indian	9	0.5%	
Other	42	2.4%	

Housing Needs of Families on the Waiting List

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

If yes:

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

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

Does the PHA permit specific categories of families onto the waiting list, even if generally closed?

No Yes

Housing Needs of Families on the Waiting List

Waiting list type: (select one)

Section 8 tenant-based assistance

Public Housing

Combined Section 8 and Public Housing

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

If used, identify which development/subjurisdiction:

	# of families	% of total families	Annual Turnover # Notified 08/02-07/03
Waiting list total	1,612		731
Extremely low income <=30% AMI	1,439	89.3%	
Very low income (>30% but <=50% AMI)	168	10.4%	
Low income (>50% but <80% AMI)	5	0.3%	
Families with children	1,331	82.6%	
Elderly families	45	2.8%	
Families with Disabilities	303	18.8%	
White	1,185	73.5%	
African American	346	21.5%	
Hispanic	19	1.2%	
Asian/Pacific Islander	6	0.4%	
American Indian	12	0.7%	
Other	44	2.7%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	281	17.4%	140
2 BR	787	48.8%	407
3 BR	497	30.8%	110
4 BR	43	2.7%	74
5 BR	3	0.3	NA
5+ BR	1	0.1	NA

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

If yes:

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

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

Does the PHA permit specific categories of families onto the waiting list, even if generally closed?

No Yes

C. Strategy for Addressing Needs

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

YEAR 2004 STRATEGY

- 1. Efficiently, effectively operate agency housing programs, while being sensitive to the needs and concerns of participants, landlords, and the community.**
 - A. Ensure efficient, effective, responsive Section 8 administration**
 1. Achieve SEMAP High Performer status
 - a. Conduct semi-annual internal compliance reviews
 2. Maximize the effectiveness of the program for applicants and participants
 - a. Target zero-income participants for integrity checks and referrals
 - b. Continue to refine and expand MTW homeownership program
 - c. Conduct written survey of program participants to obtain feedback on policies
 - d. Gather and analyze data identifying difficulties applicants have in searching for housing
 - e. Hold periodic focus group meetings for program participants
 - f. Enhance listing of available rental units
 3. Maximize efficiency of the program
 - a. Develop method/means to implement mandatory rent feature
 - b. Train staff on the use of various features connected with Visual MCS system (e.g. access interface, merge feature, etc.)
 - c. Streamline processing procedures (e.g. eliminate redundant/non-mandatory processing paperwork)
 - d. Research feasibility of and landlord opinions on consolidated inspections at large complexes
 - e. Increase staff development efforts (periodic staff in-services, retreats, etc.)
 - f. Increase activity of FSS Coordinating Committee
 - g. Improve coordination between Applications and Section 8 departments
 - h. Expand use and improve effectiveness of vacated tenants system
 4. Continue recruitment of new landlords
 - a. Hold periodic landlord seminars for potential and current Section 8 landlords
 - b. Research interest in landlord focus group
 - B. Ensure efficient, effective, responsive public housing administration**
 1. Maintain PHAS High Performer status
 - a. Conduct quarterly site inspections of multi-family sites and address PHAS and preventative needs as soon as identified
 2. Maximize the efficiency and effectiveness of housing management
 - a. Improve efforts to relocate sole remaining family members who are overhoused
 - b. Continue to improve lease enforcement, despite loss of PHDEP-funded position
 - c. Implement new rent calculation policy, as necessitated by MTW change
 - a. Obtain input and develop standard housekeeping policy and improve follow-up

- b. Begin conducting interim housekeeping inspection 60 days after a new move-in
 - c. Examine need for vehicle registration system and database
 - d. Improve tenant screening by utilizing more resources, such as NCIC records and internet resources
 - e. Improve collection of occupancy related charges other than rent
 - f. Improve collection of balances owed by vacated tenants through greater outreach and other methods
 - j. Begin to file small claim court cases for judgments for minor debts
 - k. Create and implement strategies to improve low score areas of the Resident Satisfaction Survey
 - l. Further refine the implementation of the community service requirement
 - m. Analyze the new Public Housing Guidebook and adopt changes as needed
 - n. Revise and update policies that may require change, depending upon MTW status
3. Maximize the efficiency of maintenance
- a. Continue to improve customer service scores
 - b. Increase PHAS physical inspection score over prior year
 - c. Reduce vacancy turn around time to an average of 10 days
 - d. Reduce maintenance expenditures by cost reducing efforts, such as improved purchasing techniques, performing more contractor work in-house
 - e. Refine system for tracking and monitoring work order assignments
 - f. When needed, utilize up to 20% of Capital Fund budget for routine maintenance

2. Respond to local housing needs by developing new affordable housing opportunities for low-income households and improving resource utilization.

- A. Develop affordable housing using HUD and non-HUD sources**
 - 1. Expand the supply of permanent, affordable housing, for the low-to-moderate income population in a variety of geographic areas.
 - a. Analyze opportunities for acquisition or new construction that come to the attention of PMHA
 - b. Keep up-to-date on financing resources, particularly loans/grants offered by Ohio Dept. of Development and Low-Income Tax Credit Program
 - 2. Preserve the inventory of permanent, affordable rental housing for the general low-income population
 - a. Monitor HUD contracts with private owners that are expiring, and keep in contact with owners about future plans
 - b. Administer new Section 8 vouchers received to support private project-based subsidized properties having pre-paid HUD mortgages
 - 3. Support the development of affordable housing for specific populations.
 - a. Meet with local service providers to identify housing needs of disabled population
 - b. Pursue the idea of donating vacant lots in Windham to support homeownership
- B. Use Public Housing and Section 8 resources to meet identified housing needs**
 - 1. Monitor Tenant Preference Policy to meet identified housing needs
 - a. Work with local social service agencies to refine tenant selection preferences to meet local needs as well as maximizing utilization of resources

2. Identify alternative uses for developments having marketing issues
 - a. Evaluate the feasibility of converting public housing to Section 8 housing
 - b. Continue to monitor vacancy rates and alternatives for Etna House
 3. Use Section 8 resources to assist housing owned by non-profits
 - a. Continue to market Section 8 project-based program for non-profit owners serving special needs clients
- 3. Enhance the quality of life of the PMHA's residents, with particular emphasis upon promotion of family self-sufficiency.**
- A. Increase self-sufficiency rate in public housing**
 1. Ensure policies encourage family responsibility
 - a. Implement HUD's Community Service Requirement
 2. Encourage on-site supportive services
 - a. Continue to support non-profit partners providing supportive services to public housing residents
 - b. Convert an apartment at multi-family sites to use as community space as on-site supportive services become available
 - c. Seek grant opportunities to expand playgrounds at multi-family sites
 3. Use housing as an incentive for self-sufficiency progress
 - a. Coordinate with Portage Area Development Corp. and Neighbor Works to expand the Section 8 homeownership program
 - b. Provide office space to PATH, Maplewood Career Center, and other local agencies offering resident self-sufficiency services or activities in return for usage of space
 4. Seek out and pursue appropriate grant opportunities
 - a. Seek funding for self-sufficiency activities for PMHA participants
 - b. Seek new partnerships with local agencies agreeing to offer services to PMHA participants
 - c. Seek out grants for playground equipment
 - B. Increase employment rate of Section 8 and public housing families.**
 1. Provide incentives for tenants to generate higher income
 - a. Continue to analyze public housing rent policy
 - b. Continue working with social service agencies to target services to PMHA participants having zero incomes
 2. Provide job training and work through PMHA maintenance/construction needs
 - a. Continue the maintenance/construction job training program by implementing the second year of the ROSS (Resident Opportunities for Self- Sufficiency) grant
 - b. Implement the computer-training component of the ROSS grant

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

Select all that apply

- Employ effective maintenance and management policies to minimize the number of public housing units off-line

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

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select all that apply

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

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

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

- Conduct outreach to expand elderly waiting list**
- Analysis of community need for specially designated elderly and disabled housing**

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

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

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

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

Select if applicable

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

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

- Counsel section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units
- Market the section 8 program to owners outside of areas of poverty /minority concentrations
- Other: **Expand use of Section 8 Exception Rents to increase housing choice**

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

(2) Reasons for Selecting Strategies

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

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

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

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

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2003 grants)		
a) Public Housing Operating Fund	\$521,162	
b) Public Housing Capital Fund	467,675	
c) HOPE VI Revitalization	0	
d) HOPE VI Demolition	0	
e) Annual Contributions for Section 8 Tenant-Based Assistance	5,818,136	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	0	
g) Resident Opportunity and Self-Sufficiency Grants	83,333 12,000	FY 2004 FY 2000 – 03
h) Community Development Block Grant	0	
i) HOME	0	
Other Federal Grants (list below)		
Section 8 Moderate Rehab	1,359,084	Rental assistance
Section 8 FSS Coordinator	40,977	Service referral
MTW Technical Assistance	15,000	TA through March
2. Prior Year Federal grants (unobligated funds only) (list below)		
Capital Fund 501-01	92,576	Capital improvements
501-02	157,740	
501-03	425,605	
3. Public Housing Dwelling Rental Income	605,050	PH operations
Public housing excess utilities	9,000	
4. Other income (list below)		
Laundry income	4,000	PH operations
Investment income	75,000	PH & Sec. 8 operations
4. Non-federal sources (list below)		
Commercial rental income	17,000	Supports learning center
Kent rental properties	168,275	Property operations
Total resources	\$9,871,613	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.7 9 (c)]

A. Public Housing

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

(1) Eligibility

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

- When families are within a certain number of being offered a unit: (20-30 households)
- When families are within a certain time of being offered a unit: (30-60 days)
- Other: (describe)

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

- Criminal or Drug-related activity
- Rental history (landlord references; court records)
- Housekeeping
- Other (**credit check**)

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?
None
2. Yes No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD-approved site based waiting list plan)?
 If yes, how many lists?
3. Yes No: May families be on more than one list simultaneously?
 If yes, how many lists?
4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?
- PHA main administrative office
 - All PHA development management offices
 - Management offices at developments with site-based waiting lists
 - At the development to which they would like to apply
 - Other (list below)

(3) Assignment

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

(4) Admissions Preferences

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

- Medical justification
- Administrative reasons determined by the PHA (e.g., to permit modernization work)
- Resident choice: (relocate to be closer to work, school and/or day care)
- Other: (list below)

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

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

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

1 Date and Time

Former Federal preferences:

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

4. Relationship of preferences to income targeting requirements:

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

(5) Occupancy

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

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

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

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

(6) Deconcentration and Income Mixing

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

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

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

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

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

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

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

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

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

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

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

B. Section 8

Exemptions: PHAs that do not administer section 8 are not required to complete sub-component 3B.

Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).

(1) Eligibility

- a. What is the extent of screening conducted by the PHA? (select all that apply)
- Criminal or drug-related activity only to the extent required by law or regulation
 - Criminal and drug-related activity, more extensively than required by law or regulation
 - More general screening than criminal and drug-related activity (list factors below)
 - Other (list below)
- 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 (no information is shared)

(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: **Applicant must show proof of an active search in the form of a completed landlord contact sheet.**

(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 preferences

1. Homeless referrals- families and individuals (consistent with HUD's occupancy priorities for single individuals) referred from Portage County shelters or transitional

housing programs providing written confirmation that they will be receiving follow-up supportive services from the referral agency. Agencies will be limited to two referrals per month.

2. Disabled referrals- mentally and physically disabled individuals and families referred by a Portage County social service agency providing written confirmation that they will be receiving follow-up housing and supportive services from the referral agency. Agencies will be limited to two referrals per month.
3. Landlord referral of in-place families suffering recent financial setback Families referred by their current landlord because the family has recently lost employment, and intend to staying place. This preference will only be implemented if the PMHA's Section 8 lease-up rate is 97% or below. Each participating landlord will be restricted to a maximum of two referrals per year.

In addition, applicants whose names have come to the top of the waiting list, but must postpone acceptance of Section 8 assistance, may be placed back at the top of the waiting list at a later date. This preference is intended to avoid penalizing tenants, who are residing in housing having a rental lease or program component with a specific time limit or expiration date, whose names have risen to the top of the Section 8 waiting list. Frequently, tenants under these circumstances, are not able to utilize the Section 8 subsidy at the time their name appears at the top of the waiting list due to the time commitments they are required to comply with. In order to discourage affected tenants to prematurely terminate their existing housing commitments, if after notification, the applicants wish to postpone the acceptance of the Section 8 subsidy, they may do so. These tenants would then be given the next available Section 8 subsidy upon completion of their housing commitment. These applicants include those tenants:

- a. Residing in Section 8 Moderate Rehab units who have resided there for less than one year
- b. Residing in group homes or similar supportive, congregate housing and are less than 6 months from being able to live independently
- c. Residing at a supportive services public housing site who have not fulfilled the terms of their family development plan and wish to remain on site until the completion of their plan
- d. Tenants verifying that they are bound by the terms of an existing rental lease until a specific expiration date that is less than 6 months from the date their name appeared at the top of the waiting list

All other Section 8 waiting list households would be ranked by order of date of application, with preference given to the following:

Local residency - Local residents are those who:

- a. live in Portage County, or
- b. are employed in Portage County or are notified that they are hired to work in Portage County

Applicants having only the local residency preference will be selected based on a first-come, first-served basis. Those without any preference will fall after all applicants having the local residency preference. They will also be placed in first-come, first served order, based on date of application.

Ten percent (10%) of each group of applicants selected/notified from the waiting list will be applicants designated as "Other Single".

Ten percent (10%) of each group of applicants selected/notified from the waiting list will be applicants who are out-of-county residents. Out of county residents are those who do not live or work in Portage County.

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

1 Date and Time

Former Federal preferences

- 1 Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
Victims of domestic violence
Substandard housing
- 1 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 preferences:
X Disabled
X Households without children up to 10% of each notification round

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

N/A The PMHA does not administer Special Purpose Section 8

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

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

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

- Through published notices
- Other (list below)

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

3. If yes to question 2, list these policies below: ***Reviewed on a case by case basis through the grievance procedures; however, N/A due to \$0 minimum rent.***

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: ***As part of the Moving To Work demonstration, PMHA uses ceiling rents.***

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:

\$500 deduction for full-time employment and/or full time education per the MTW contract

- 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: Overtime and bonus income are excluded as well as interest from bank assets per MTW contract.

e. Ceiling rents

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

- Yes for all developments

- Yes but only for some developments
- No

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

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

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

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

f. Rent re-determinations:

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

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

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

(2) Flat Rents

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

- The section 8 rent reasonableness study of comparable housing

- Survey of rents listed in local newspaper
- Survey of similar unassisted units in the neighborhood
- Other *N/A per Moving to Work contract*

B. Section 8 Tenant-Based Assistance

Exemptions: PHAs that do not administer Section 8 tenant-based assistance are not required to complete sub-component 4B. **Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

(1) Payment Standards

Describe the voucher payment standards and policies.

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

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

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

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

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

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

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

- Annually
- Other (list below)

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

- Success rates of assisted families
- Rent burdens of assisted families

Other (list below)

(2) Minimum Rent

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

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

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

Taken on a case-by-case basis through the grievance procedure; however, N/A due to \$0 minimum rent

5. Operations and Management

[24 CFR Part 903.7 9 (e)]

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

Portage MHA is a high-performing PHA

A. PHA Management Structure

Describe the PHA's management structure and organization.

(select one)

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

B. HUD Programs Under PHA Management

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

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

Other Federal Programs(list individually)		
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C. Management and Maintenance Policies

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

- (1) Public Housing Maintenance and Management: (list below)
- (2) Section 8 Management: (list below)

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

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

Portage MHA is a high performing PHA

A. Public Housing

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

If yes, list additions to federal requirements below:

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

B. Section 8 Tenant-Based Assistance

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

If yes, list additions to federal requirements below:

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

- PHA main administrative office
 Other (list below)

7. Capital Improvement Needs

[24 CFR Part 903.7 9 (g)]

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

A. Capital Fund Activities

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

(1) Capital Fund Program Annual Statement

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

Select one:

- The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at **Attachment B**

-or-

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

(2) Optional 5-Year Action Plan

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

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

b. If yes to question a, select one:

- The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at **Attachment B**

-or-

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

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

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

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

1. Development name:
2. Development (project) number:
3. Status of grant: (select the statement that best describes the current status)

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

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

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

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

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

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

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

2. Activity Description

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

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

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

[24 CFR Part 903.7 9 (i)]

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

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

2. Activity Description

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

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

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

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

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

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

2. Activity Description

Yes No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing

Asset Management Table? If “yes”, skip to component 11. If “No”, complete the Activity Description table below.

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

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

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 (1)]

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

Portage MHA is a high performing PHA

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

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

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

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

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

B. Services and programs offered to residents and participants

(1) General

a. Self-Sufficiency Policies

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

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

b. Economic and Social self-sufficiency programs

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

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

(2) Family Self Sufficiency program/s

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2000 Estimate)	Actual Number of Participants (As of: DD/MM/YY)
Public Housing		
Section 8		

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

C. Welfare Benefit Reductions

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)
- Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies
 - Informing residents of new policy on admission and reexamination
 - Actively notifying residents of new policy at times in addition to admission and reexamination.
 - Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services

- Establishing a protocol for exchange of information with all appropriate TANF agencies
- Other: (list below)

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

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.7 9 (m)]

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

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

1. Describe the need for measures to ensure the safety of public housing residents

(select all that apply)

- High incidence of violent and/or drug-related crime in some or all of the PHA's developments
- 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? All multi-family developments excluding elderly and disabled

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 Capital improvements to enhance security

2. Which developments are most affected? All Senior and Multi-family developments

C. Coordination between PHA and the police

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

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

2. Which developments are most affected? All Senior and Multi-family developments

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 2004 in this PHA Plan?
- Yes No: This PHDEP Plan is an Attachment. (Attachment Filename: N/A___)

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

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

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

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

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

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

Portage MHA is a high performing PHA

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 D**
 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

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

1. Consolidated Plan jurisdiction: **City of Kent, Ohio**

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)
 1. **Portage MHA will continue to provide transitional housing at Renaissance Place**
 2. **Expand use of Section 8 assistance to persons with disabilities**
 3. **Continue to provide development assistance to agencies serving persons with disabilities**
 4. **Continue to provide Section 8 assistance to large family households**
 5. **Through Portage HOPES, continue homeownership program**
- Other: Consolidated Plan jurisdiction: **Portage County, Ohio-State of Ohio**

4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: *On-going communication, active involvement in the Portage County Housing Services Council, provision of demographic information, provision of CDBG funds for fair housing activities and CDBG funding for social agencies partnering with PMHA at public housing developments*

5. 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)
- Portage MHA will continue to provide transitional housing at Renaissance Place*
- Expand use of Section 8 assistance to persons with disabilities*
- Continue to provide development assistance to agencies serving persons with disabilities*
- Continue to provide Section 8 assistance to large family households*
- Through Portage HOPES, continue homeownership program for Public Housing tenants*
- Market Section 8 program to attract new landlords and expand housing choice*

6. The consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: **See number 4 above**

D. Other Information Required by HUD

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

Attachments

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

- A.** *Deconcentration Policy*
- B.** *2004 Capital Fund Annual Statement & Five-Year Capital Fund Plan*
- C.** *Progress in Meeting 5-Year Plan Mission and Goals*
- D.** *Resident Advisory Board Comments*
- E.** *Membership of the Resident Advisory Board*
- F.** *Resident Membership of the PHA Governing Board*
- G.** *RASS Follow-up Plan*
- H.** *Voluntary Conversion Initial Assessment*
- I.** *MTW Rent Change for Earned Income Disregard For Section 8 Disabled Adults*
- J.** *50102 2002 PE*
- K.** *50101 2001 PE*
- L.** *50100 2000 PE*

Attachment A Year 2003 Income Deconcentration Analysis

Under the provisions of the Quality Housing and Work Responsibility Act, housing authorities must analyze their public housing for concentrations of poverty in their developments. The following summarizes the results and methodology of PMHA's analysis, using data from July 2003.

Moving To Work Exclusions

The PMHA's Moving To Work program has two objectives that impact upon the income deconcentration goal of the QHWRA. The two MTW objectives that impact the deconcentration goal include the objectives that call for: a) provision of self-sufficiency supportive services on site at two public housing locations and b) the use of housing with more amenities as an incentive for self-sufficiency.

The first objective involves the provision of services coordinated by PATH at Community Estates and Renaissance Place. The MTW waivers incorporate the PATH program requirement that new admissions under the PATH program at these two sites be restricted to the homeless. Consequently, the in-coming PATH participants are coming from an unstable situation, and frequently, their incomes are lower. Thus, it would be expected that newly admitted tenants at these two developments would have income relatively lower than the incomes for tenants occupying the other PMHA developments.

Secondly, the objective involving the use of more desirable housing as an incentive, involves the deliberate designation of scattered site units for those tenants having higher incomes. In order to reward families' progress toward economic self-sufficiency, the scattered site units are reserved for those families meeting certain criteria, which include meeting a required minimum income level. Thus, over time, as this feature is implemented, the scattered site projects will reflect a higher income level.

Therefore, based on the MTW waivers granted to the PMHA for supportive services and transfers to scattered sites, the following projects will not be covered by the PMHA's annual deconcentration analysis in the future:

31-01 Community Estates	31-02 Scattered site - Rehab
31-15 Renaissance Place	31-10 Scattered site - New construction

Analysis

Two methods were utilized in this analysis of the incomes of residents at the four subject developments:

31-01 Athena Gardens	31-03 Harvest Woods
31-05 Town Square Villas	31-09 Heritage Knolls

The first analysis involved assigning each family to one of three income categories: extremely low-income, very low-income, and low-income. As can be

seen on the following table, the majority (71%) of units at these developments fall within the extremely low-income category:

Table I
Income Distribution at Multi-Family Sites
Based on July 2003 Data

Total # of occupied units-111	Extremely Low-Income		Very Low-Income		Low Income		Over Income	
	# Units	Percent	# Units	Percent	#Units	Percent	#	%
Athena Gardens	20	80%	4	16%	1	4%	0	
Harvest Woods	22	79%	5	21%	0	0%	0	
Town Square	16	57%	10	36%	2	7%	0	
Heritage Knolls	21	70%	5	17%	3	10%	1	3%
Total 2003	79	71%	25	23%	6	5%	1	1%
<i>Total 2002 (113 units)</i>	<i>75</i>	<i>66%</i>	<i>27</i>	<i>24%</i>	<i>10</i>	<i>9%</i>	<i>1</i>	<i>1%</i>

Definition of Income Ranges

Family Size	Extremely Low Income (below 30% median)	Very Low Income (31%-50% median)	Low Income (51%-80% of median)
	(\$)	(\$)	(\$)
1	12,650	21,100	33,750
2	14,450	24,100	38,600
3	16,300	27,150	43,400
4	18,100	30,150	48,250
5	19,550	32,550	52,100
6	21,000	34,950	55,950

Based on 2000 data, 93% of units at these developments fell within the Extremely Low-Income range compared to 64% in 2001; 66% in 2002; and 71% in 2003.

The July 2003 data demonstrates a decrease in the Very Low-Income range from 34 households in 2001 to 27 in 2002 and 25 in 2003. There were zero households falling within this category in 2000.

The number of households falling in the Low-Income range has steadily increased between 2000 and 2002. In 2000, there were 3 families in this category compared to 7 in 2001 and 10 in April 2002. However, the number decreased to 6 families in 2003. The decrease is most likely due to the economic slowdown and the exit of families with higher incomes from public housing. With reference to exits, 46 (41%) families from these four developments left public housing during the past year. Of those remaining, 22% of households experienced an income decrease.

During 2002 and 2003, there was one family during each year identified as "over income." Different families occupied this category in 2002 and 2003. The family that was over income in 2002 is currently "low-income."

Because of the small number of units in each of these developments, it needs to be pointed out that each number has a significant impact on percentages. For example, at the time of the 2002 analysis, Heritage Knolls had 53% (16 units) of units that fell within the extremely low-income range. This year's analysis indicates that 21 Heritage Knolls units (70%) fall within the low-income range. Thus, a change of 5 units yields a percentage change of 17.

A second method of comparison consisted of calculating the average income for each development and then comparing each to the average income for all four developments. The average income for all four (\$11,917) served as the basis for the Established Income Range. Each average income per development falls within the Established Income Range (85%-115% of the average income for all noted developments). Average incomes are as follows:

2003 Established Income Range

Average income for all sites: \$11,917

<i>Site:</i>	<i>Average Income</i>	<i>Percent of Average</i>
Heritage Knolls	\$13,138	110%
Townsquare Villas	\$13,285	111%
Harvest Drive	\$10,282	86%
Athena Drive	\$10,753	90%

Conclusion

The PMHA developments fall within the Established Income Range of Average Income - \$11,917 based on 2003 data. Therefore, the staff recommends that no revisions be made to the public housing admissions policy at this time.

Component 3, (6) Deconcentration and Income Mixing

a. Yes No: Does the PHA have any general occupancy (family) public housing developments covered by the deconcentration rule? If no, this section is complete. If yes, continue to the next question.

b. Yes No: Do any of these covered developments have average incomes above or below 85% to 15% of the average incomes of all such developments? If no, this section is complete.

If yes, list these developments as follows:

Deconcentration Policy for Covered Developments			
Development Name:	Number of Units	Explanation (if any) [see step 4 at 903.2(c) (1)(iv)]	Deconcentration policy (if no explanation) [see step 5 at 903.29c)(1)(v)]

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

HA Name:						<input checked="" type="checkbox"/> Original	<input type="checkbox"/> Revision No: _____
Portage Metropolitan Housing Authority							
Development Number/Name/Ha-Wide	Year 1 FFY: 2004	Work Statement for Year 2 FFY Grant: 2005 PHA FY: 2005	Work Statement for Year 3 FFY Grant: 2006 PHA FY: 2006	Work Statement for Year 4 FFY Grant: 2007 PHA FY: 2007	Work Statement for year 5 FFY Grant: 2008 PHA FY: 2008		
OH31-01 Athena Gardens		0.00	48,000.00	38,000.00	30,000.00		
OH31-01 Community Estates		0.00	61,500.00	42,500.00	35,000.00		
OH31-02 Scattered Sites		0.00	0.00	85,200.00	92,500.00		
OH31-03 Ravenna Woods		0.00	62,000.00	86,500.00	79,600.00		
OH31-04 Eastowne Manor		0.00	0.00	7,500.00	24,500.00		
OH31-05 Town Square Villas	See	0.00	78,000.00	19,000.00	19,800.00		
OH31-06 Etna House		0.00	0.00	3,000.00	2,500.00		
OH31-09 Heritage Knolls	Annual	0.00	2,000.00	9,700.00	0.00		
OH31-10 Ravenna Scattered		0.00	41,000.00	2,000.00	0.00		
OH31-11 Washington Group	Statement	0.00	0.00	2,200.00	0.00		
OH31-15 Acquisition Rehab		0.00	8,000.00	6,400.00	19,800.00		
CFP Funds Listed for 5-Year Planning		568,404.00	568,404.00	568,404.00	568,404.00		
Replacement Housing Factor Funds							
PHA Wide-Operations Reseved Funds							

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages- Work Activities

Activities for Year 1 2004	Activities for year: 2 FFY Grant: 2005 PHA FY: 2005			Activities for Year: 3 FFY Grant: 2006 PHA FY: 2006		
	Development Number/Name	Major Work Categories	Estimated Cost	Development Number/Name	Major Wor Categories	Estimated Cost
See Annual Statement	Office Addition	Office Addition	321,141.00			
	OH31-01 Athena Gardens		0.00	OH31-01 Athena Gardens	Kit/Bath cabinets, faucets sinks, & counter tops	48,000.00
	OH31-01 Community Estates		0.00	OH31-01 Community Estates	Underground electric Kit/Bath cabinets,faucts sinks & counter tops	5,000.00 56,500.00
	OH31-02 Scattered Sites		0.00	OH31-02 Scattered Sites		
	OH31-03 Ravenna Woods		0.00	OH31-03 Ravenna Woods	Replace & Stain Siding Repl Guters & Downs	62,000.00
	OH31-04 Eastowne Manor		0.00	OH31-04 Eastowne Manor		0.00
	OH31-05 Town Square Villas		0.00	OH31-05 Town Square Villas	Security Lights Shed Doors Retaining Wall	25,000.00 20,000.00 33,000.00
	OH31-06 Etna House		0.00	OH31-06 Etna House		
	OH31-09 Heritage Knolls		0.00	OH31-09 Heritage Knolls	Security Lights	2,000.00
	OH31-10 Ravenna Single Homes		0.00	OH31-10 Ravenna Single Homes	Roof, gutters & downs Bath vanity/sink/faucet cabinets and tubs	35,000.00 6,000.00 0.00
	OH31-11 Washington Group Home		0.00	OH31-11 Washington Group Home		
	OH31-15 Acquisition Rehab.		0.00	OH31-15 Acquisition Rehab. Denny, Polly, and Polly Renaissance Place	Water Softeners Security Lights	6,000.00 2,000.00
	Subtotal of Estimated Cost			321,141.00	Subtotal of Estimated Cost	

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages- Work Activities

Activities for Year 1	Activities for year: 4 FFY Grant:2007 PHA FY:2007			Activities for Year: 5 FFY Grant:2008 PHA FY:2008			
2004	Development Number/Name	Major Wrok Category	Estimated Cost	Development Number/Name	Major Work Category	Estimated Cost	
See Annual Statement	OH31-1 Athena Gardens	Repl bath tubs & fixtures Repl smoke detectors	35,000.00 3,000.00	OH31-1 Athena Gardens	Cold air returns - upstairs Replace circuit boxes	20,000.00 10,000.00	
	OH31-01 Community Estates	Repl bath tubs & fixtures Repl smoke detectors	39,000.00 3,500.00	OH31-01 Community Estates	Cold air returns - upstairs Replace circuit boxes	23,000.00 12,000.00	
	OH31-02 Scattered Sites Walnut Street (no carpet 227 - no roofs at elm)	Repl carpet Furniture & wall paper Repl roofs, gutters, downs	30,200.00 10,000.00 45,000.00	OH31-02 Scattered Sites	Roofs, carpet, kitchens, bath rooms, doors windows, furnaces, and siding	92,500.00	
	OH31-03 Ravenna Woods	Replace Windows Repl smoke detectors	86,500.00 3,500.00	OH31-03 Ravenna Woods	Security lighting, appliances Remove trees & stumps	40,400.00 28,000.00	
	OH31-04 Eastowne Manor	Repl smoke detectors	7,500.00	OH31-04 Eastowne Manor	Clean outs Air handler	11,200.00 8,500.00	
	OH31-05 Town Square Villas	Repl kitchen lights Repl smoke detectors Site sign	15,000.00 3,500.00 500.00	OH31-05 Town Square Villas	Emergency wiring/sec lights Replace entrance heaters Replace circuit boxes	12,000.00 4,000.00 10,000.00	
	OH31-06 Etna House	Repl smoke detectors	3,000.00	OH31-06 Etna House	Rebuild brick - thresholds	9,800.00	
	OH31-09 Heritage Knolls	Repl smoke detectors	2,000.00	OH31-09 Heritage Knolls	Repl front exterior doors	2,500.00	
	OH31-10 Ravenna Single Homes	Shed doors & thresholds Smoke det./site sign	6,200.00 3,500.00	OH31-10 Ravenna Single Homes			
	OH31-11 Washington Group Home	Repl smoke detectors	2,200.00	OH31-11 Washington Group Home			
	OH31-15 Acquisition Rehab.	Repl smoke detectors Site Sign	5,900.00 500.00	OH31-15 Acquisition Rehab. Denny, Polly, and Polly	Retention pond Replace wells	4,800.00 15,000.00	
		Total for Non-Dwelling Equipment:		0.00	Total for Non-Dwelling Equipment:		0.00
		Total CFP Estimated Cost		305,500.00	Total CFP Estimated Cost		303,700.00

Five-Year Action Plan
Part III: Supporting Pages

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

OMB Approval No. 2577-0157
(exp. 7/31/98)

Capital Funding Program (CFP)

Work Statement for Year 1 FFY: 2004	Work Statement for Year: 2 FFY: 2005			Work Statement for Year: 3 FFY: 2006		
	General Description of Major Work Categories	Quantity	Estimated Cost	General Description of Major Work Categories	Quantity	Estimated Cost
See Annual Statement	Operations		76,092.00	Operations		71,188.00
	Resident Security		6,800.00	Resident Security		6,800.00
	Develop Resident Jobs Training Program and Business Development Program		30,200.00	Develop Resident Jobs Training Program and Business Development Program		64,581.00
	Coordinator of Social Service for Drug Elimination		38,831.00	Coordinator of Social Service for Drug Elimination		39,995.00
	Administration Salaries		41,237.00	Administration Salaries		41,237.00
	Administration Fringes		14,803.00	Administration Fringes		14,803.00
	Advertising		800.00	Advertising		800.00
	Audit		2,500.00	Audit		2,500.00
	Fees & Costs		1,000.00	Fees & Costs		1,000.00
	Nondwelling Equipment		35,000.00	Nondwelling Equipment		25,000.00
	Subtotal of Estimated Cost		247,263.00	Subtotal of Estimated Cost		267,904.00

Five-Year Action Plan
Part III: Supporting Pages

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

OMB Approval No. 2577-0157
(exp. 7/31/98)

Capital Funding Program (CFP)

Work Statement for Year 1 FFY: 2002	Work Statement for Year: 4 FFY: 2007			Work Statement for Year: 5 FFY: 2008		
	General Description of Major Work Categories	Quantity	Estimated Cost	General Description of Major Work Categories	Quantity	Estimated Cost
See Annual Statement	Operations		52,651.00	Operations		71,207.00
	Resident Security		6,800.00	Resident Security		6,800.00
	Develop Resident Jobs Training Program and Business Development Program		66,518.00	Develop Resident Jobs Training Program and Business Development Program		68,514.00
	Coordinator of Social Service for Drug Elimination		41,595.00	Coordinator of Social Service for Drug Elimination		42,843.00
	Administration Salaries		41,237.00	Administration Salaries		41,237.00
	Administration Fringes		14,803.00	Administration Fringes		14,803.00
	Advertising		800.00	Advertising		800.00
	Audit		2,500.00	Audit		2,500.00
	Fees & Costs		1,000.00	Fees & Costs		1,000.00
	Nondwelling Equipment		35,000.00	Nondwelling Equipment		15,000.00
	Subtotal of Estimated Cost		262,904.00	Subtotal of Estimated Cost		264,704.00

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

HA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150104 Capital Fund Program Grant No: 2004 Replacement Housing Factor Grant No. 2004 Federal FY of Grant: <div style="text-align: right;">2004</div>
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Original Annual Statement
 Reserve for Disasters/Emergencies
 Revised Annual statement/Revision Number _____
 Performance and Evaluation report for Program Year 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	0.00	0.00	0.00	0.00
2	1406 Operations	56,000.00	0.00	0.00	0.00
3	1408 Management Improvements	86,564.00	0.00	0.00	0.00
4	1410 Administration	56,840.00	0.00	0.00	0.00
5	1411 Audit	1,500.00	0.00	0.00	0.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	1,000.00	0.00	0.00	0.00
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	68,000.00	0.00	0.00	0.00
10	1460 Dwelling Structures	275,500.00	0.00	0.00	0.00
11	1465.1 Dwelling Equipment - Nonexpendable	8,000.00	0.00	0.00	0.00
12	1470 Nondwelling Structures	0.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	15,000.00	0.00	0.00	0.00
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	0.00	0.00	0.00	0.00
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1501 Collaterization or Debt Service	0.00	0.00	0.00	0.00
20	1502 Contingency	0.00	0.00	0.00	0.00
21	Amount of Annual Grant (Sum of Lines 2-20)	568,404.00	0.00	0.00	0.00
22	Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23	Amount of line 21 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
24	Amount of line 21 Related to Security - Soft Costs	5,000.00	0.00	0.00	0.00
25	Amount of line 21 Related to Security - Hard Costs	0.00	0.00	0.00	0.00
26	Amount of line 21 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150104 Capital Fnd Program Grant No: 2004 Replacement Housing Factor Grant No: 2004			Federal FY of Grant: 2004			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No. Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA-Wide	Operations	1406		56,000.00	0.00	0.00	0.00	
HA-Wide	Management Improvements	1408						
	Resident Security			5,000.00	0.00			
	Develop Job Training & Business							
	Develop Programs			38,000.00	0.00			
	Coordinator of Social Services for Drug Elimination			38,564.00	0.00			
	Administrative/Management Improvements			5,000.00				
	Total for Management Improvements			86,564.00	0.00	0.00	0.00	
HA-Wide	Administration	1410						
	a. Salaries	1410.1		41,237.00	0.00			
	b. Fringe Benefits	1410.9		14,803.00	0.00			
	c. Advertising	1410.19		800.00	0.00			
	Total for Administration			56,840.00	0.00	0.00	0.00	
HA-Wide	Fees & Costs	1430						
	a. Architect				0.00			
	b. Planing Fees			1,000.00				
	Total for Fees & Costs			1,000.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Equipment	1475						
	a. Office Equipment			15,000.00	0.00			
	Total for Nondwelling Equipment			15,000.00	0.00	0.00	0.00	
HA-Wide	Relocation Cost	1495.1		0.00	0.00	0.00	0.00	
HA-Wide	Contingency	1502			0.00	0.00	0.00	

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150104 Capital Fnd Program Grant No: 2004 Replacement Housing Factor Grant No: 2004			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 Proposed Work (2)
				Original	Revised	Funds Obligated	Funds Expended	
		1450						
OH31-01 Athena Gardens	Playground Equipment			17,000.00				
OH31-09 Heritage Knolls	Playground Equipment			17,000.00				
OH31-3 Ravenna Woods	Playground Equipment			17,000.00				
OH31-05 Town Square Villas	Playground Equipment			17,000.00				
	Total for Site Improvement			68,000.00	0.00	0.00	0.00	
OH31-02 Scattered Sites Highland Avenue Garden Court	Complete Renovation Complete Renovation	1460		40,000.00 30,000.00				
					0.00			
OH31-03 Ravenna Woods	Kitchen cabinets, Counter Tops, Sinks, Faucets			47,000.00	0.00 0.00 0.00			
OH31-04 Eastowne Manor	Replace Front Door w/keyless entry Intercom System Trash Compactor			7,000.00 30,000.00 5,000.00	0.00			
OH31-05 Town Square Villas	Kitchen cabinets, Counter Tops, Sinks, Faucets			47,000.00				
OH31-06 Etna House	Intercom System Handrails on both sides of hallways			20,000.00 2,500.00				
OH31-09 Heritage Knolls	Kitchen cabinets, Counter Tops, Sinks, Faucets			47,000.00				
	Total for Dwelling Structures			275,500.00	0.00	0.00	0.00	
OH31-02 Walnut Street	Replace HVAC	1465		8,000.00				
	Total for Dwelling Equipment-Nonexp.			8,000.00	0.00	0.00	0.00	
		1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	Total for Nondwelling Equipment			15,000.00	0.00	0.00	0.00	

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

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
OH31-01 Athena Gardens	06/30/06			09/30/08			
OH31-01 Community Estates	06/30/06			09/30/08			
OH31-02 Scattered Sites	06/30/06			09/30/08			
OH31-03 Ravenna Woods	06/30/06			09/30/08			
OH31-04 Eastowne Manor	06/30/06			09/30/08			
OH31-05 Town Square	06/30/06			09/30/08			
OH31-06 Etna House	06/30/06			09/30/08			
OH31-09 Heritage Knolls	06/30/06			09/30/08			
HA-Wide Physical Improvements							
HA-Wide Mgmt. Impr.	12/31/06			12/31/08			
Administration	12/31/06			12/31/08			
Fees & Costs	12/31/06			12/31/08			
Contingency	12/31/06			12/31/08			

Signature of Executive Director & Date:
X

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:
X

Attachment C
Progress in Meeting 5-Year Plan Mission and Goals
Year 2003 Accomplishments

1. Efficiently, effectively operate agency housing programs, while being sensitive to the needs and concerns of participants, landlords, and the community.

A. Ensure efficient, effective, responsive Section 8 administration

1. Achieve SEMAP High Performer status

- a. Conduct semi-annual internal compliance reviews
Reviews were conducted..
- b. Convert MTW vouchers to new 50058 format
All existing program participants were converted by May 2003.
- c. Train staff and convert to new Windows-based computer programs
Training was completed and all new software is being utilized.

2. Maximize the effectiveness of the program for applicants and participants

- a. Continue to expand homeownership program
Homeownership participants have reached a record number. Through August 2003, families in some type of homeownership program totaled 54. Of these, 9 closed on homes, 6 participate in the short-term lease/purchase program, and 39 participate in the long-term, LITC program. PMHA received an award from the Cleveland HUD office at the OHAC spring conference for its homeownership program.
- b. Conduct written surveys of program participants to obtain feedback on policies and their effectiveness.
A written survey was drafted and distributed. Results were obtained, however, they consisted of a very limited number of responses. Efforts will be made to obtain more feedback during the meetings and hearings established for the Annual Plan in fall 2003.

Additional accomplishments:

- *FSS enrollment has reached a record number of families.*
- *MTW project-based Section 8 feature has expanded and assisted local agencies in better utilizing their resources to assist families having special needs.*
- *An onslaught of 173 Section 8 vouchers for tenants of Indian Valley apartments was successfully and efficiently administered due to extra work by staff*

3. Maximize efficiency of the program

- a. Improve efficiency in the briefing process.
Briefing sessions have been held more frequently, in order to reduce the number of attendees to ensure that the information is understood. Briefings are aided by a PowerPoint presentation, for consistency and visual interest. A new Briefing Package of information was developed.
- b. Target zero income participants for integrity checks and referrals
This activity was undertaken to some extent, but not to the scale needed. Due to changes in the economy, many more tenants have zero income, compared to the past. This effort will need to be expanded. Section 8 and public housing staff attended training on Resident Integrity Management.

Additional accomplishments:

- *An intern from the University of Akron was hired over the summer to update the*

rent reasonableness database.

- *Grant applications were submitted in cooperation with local agencies, for additional Section 8 vouchers under the Mainstream and Shelter+Care programs*

4. Recruit new landlords

- a. Conduct periodic seminars for potential and current landlords
A well-attended seminar was conducted in spring 2003. New landlords continue to enter the program.
- b. Conduct written surveys of property owners to obtain feedback
A satisfaction survey was conducted early in the year, with minimal responses. Better feedback has been received through the seminar noted above. A more recent limited survey has produced a much greater response.

B. Ensure efficient, effective, responsive public housing administration

1. Maintain PHAS High Performer status

- a. Conduct quarterly site inspections of multi-family sites and address PHAS and preventative needs as soon as identified
Quarterly inspections have been undertaken throughout the year. However, with the loss of the PHDEP-funded Site Manager's position in August, this activity may not be able to be continued by the housing management staff.

2. Maximize the efficiency and effectiveness of housing management

- a. Notify sole remaining family members more timely after they qualify as a sole family member (after 90 days of family composition change)
This activity was not needed, as there were no situations involving this issue.
- b. Revisit current rent calculation policy to determine if a new policy is needed
A great deal of time was devoted to analysis a more administratively effective rent policy. However, no changes have been implemented due to the uncertainty of the MTW time extension request that is pending at HUD Headquarter.
- c. Revise existing Housekeeping Policy to assist in more effective inspections and lease enforcement and clearly relay the procedures to residents prior to implementation.
More work is needed on this activity before the end of the year.
- d. Create a vehicle registration system and database for 1 to 2 properties on a test basis to assist in determining realistic procedures and ongoing tracking of the system.
In light of the loss of funding for the Site Manager's position, this activity will be too time consuming for the existing staff to monitor. A simpler system will need to be developed.
- e. Further develop towing procedures for quicker follow-up instead of implementing only during business hours.
Due to the upcoming loss of the Site Manager's position, this activity will also require refinement, and perhaps more involvement from the Maintenance Department.
- f. Further develop applicant screening procedures
The Internet is used more extensively in applicant screening. In addition, the form used for previous rental data now includes a request for an applicant's last five-year rental history. Rental history is confirmed through County Auditor records, website, or by phone. Public Court records are also utilized to gather past applicant addresses, as are credit checks, birth certificates and driver's licenses, in order to

identify omitted information or derogatory references. Efforts to utilize the National Crime Information Center data are being expbred.

- g. Further improve lease enforcement.
Lease violation notices are issued more quickly now with staff support. A new strategy of sending requests for cooperation instead of a lease violation has been helpful and does not require a tenant to complain in writing. Improvements have been made with the relationship with the Kent Police Department, as police reports and narratives can be obtained even more timely.
- h. Further improve maintenance communications in regard to lease enforcement and vacancies
Personnel changes in the Maintenance Department and regular joint vacancy meetings have improved communications.
- i. Further improve rent collection procedures
A rent collection policy was developed and implemented at the beginning of the year. To date, the Rent Extension Policy has been very successful. 3 to 5 tenants use the extension offer per month. So far during 2003, only 3 evictions occurred due to non-payment of rent versus approximately 20 evictions for non-payment in 2002.

3. Maximize the efficiency of maintenance

- a. Maintain PHAS physical inspection score of at least 90%
The latest physical inspection score dropped to 88.7%. Major improvements have been made since the early February inspections.
- b. Maintain vacancy turn around time at an average of 10 days
The most recent vacancy report printout reflected a vacancy turn around time average of 10.6 days.
- c. Implement a preventative maintenance program for equipment.
This activity has yet to be undertaken. It should be completed by the end of the year.
- d. Reorganize Maintenance Department to become more efficient and productive.
A great deal of time, thought and money was devoted to analyzing maintenance operations during the fall 2002 and winter 2003. As a result, a new Maintenance Manager was hired and some personnel changes and staff assignments were changed. Maintenance operations have improved dramatically as a result.

Additional accomplishments:

- *Responses to the Performance Rating surveys, attached to all work orders for the resident to complete and return, have revealed a significant increase in favorable responses from tenants.*
- *Following purchase and training on new bar coding software, coding of inventory is taking place and the computer input should be completed by the end of the year.*

2. Respond to local housing needs by developing new affordable housing opportunities for low-income households and improving resource utilization.

A. Develop affordable housing using HUD and non-HUD sources

- 1. Expand the supply of permanent, affordable housing, for the low-to-moderate income population in a variety of geographic areas.
 - a. Analyze opportunities for acquisition or new construction that come to the attention of Portage Metropolitan Housing Authority
The PMHA has considered several opportunities, but chose not to pursue them at this time.

- b. Keep up-to-date on new tools for financing housing
The Director continues to read up-to-date information about financing tools. In particular, extensive information was obtained from Fannie Mae.
 - c. Analyze best use of vacant single-family lots owned by Portage Metropolitan Housing Authority
The PMHA entered into a purchase option with a local non-profit for disposition of the Windham lots to promote affordable homeownership. HUD approval must be obtained.
2. Preserve the inventory of permanent, affordable rental housing for the general low-income population
- a. Monitor HUD contracts with private owners that are expiring, and keep in contact with owners about future plans
PMHA continues to stay up-to-date, especially in cases where the PMHA may receive replacement vouchers for project-based tenants.
 - b. Administer new Section 8 vouchers received to support private project-based subsidized properties having pre-paid HUD mortgages.
This year's allocation consisted of 173 Vouchers for Indian Valley, which were administered in a timely manner. Additional units may be forthcoming during 2003.
 - c. Assist current or new owners attempting to preserve existing affordable housing with PMHA services or resources
PMHA has worked with Indian Valley and Terrill Common management in order to help with smooth transitions in terms of subsidy or new ownership.
3. Support the development of affordable housing with supportive services for special needs populations.
- a. Continue meetings of Mainstream committee, and apply for Mainstream Section 8 units if needed.
Based on input from the Committee, as well as information from the PMHA's waiting list, a grant application was prepared for submission under the Mainstream program.
- B. Use Public Housing and Section 8 resources to meet identified housing needs
- 1. Monitor Tenant Preference Policy to meet identified housing needs
 - a. Work with local social service agencies to refine tenant selection preferences to meet local needs as well as maximizing utilization
PMHA worked closely in implementing changes to the preference policy made early in the year, that restricted the number of referrals made by agencies. The change has proceeded smoothly.
 - 2. Identify alternative uses for developments having marketing issues
 - a. Form task force to study best occupancy use for Etna House.
This was not undertaken, as vacancy rates have not been a problem in the last year.
 - a. Submit proposal to HUD for conversion of Willow property to transitional housing.
The Board approved a conversion request, which was submitted to Headquarters under a MTW request. No action has been taken by Headquarters.
 - 3. Use Section 8 resources to assist housing owned by non-profits

- a. Promote Section 8 project-based program for non-profit owners serving special needs clients

A total of 33 units have been awarded Section 8 project-based assistance. Marketing of the feature continues.

3. Enhance the quality of life of the PMHA's residents, with particular emphasis upon promotion of family self-sufficiency.

A. Increase self-sufficiency rate in public housing

1. Ensure policies encourage family responsibility

- a. Implement Portage HOPES changes to rent policy

The MTW features continue to be implemented and refined, based on analysis of experience. PMHA has informed HUD Headquarters MTW staff, that the PMHA is interested in working with them as an experimentation site for rent policy changes.

2. Encourage on-site supportive services

- a. Continue to support non-profit partners providing supportive services to public housing residents

Relationships with PATH, Maplewood Adult Education, Love Light, Community Action Council, and Campfire Girls and Boys continued. In addition, the PMHA has become a Senior Companions site.

3. Use housing as an incentive for self-sufficiency progress

- a. Implement STEP Section 8 features of Portage HOPES

This feature was not implemented due to the tight budget of Section 8 program.

- b. Coordinate with Portage Area Development Corp. and Neighbor Works to expand the Section 8 homeownership program

The Section 8 homeownership program has grown dramatically, due in large part to the willingness of PADCorp to target PMHA participants with its programs, and PADCorp's success in obtaining mortgage funds from multiple sources.

4. Seek out and pursue appropriate grant opportunities

- a. Seek funding for self-sufficiency activities for PMHA participants

PMHA is negotiating an expanded agreement with Family and Community Services for additional case management services for public housing families under the 2002 ROSS grant.

- b. Seek new partnerships with local agencies agreeing to offer services to PMHA participants.

Computer classes were provided on site by instructors from Maplewood Career Center, using ROSS grant funds.

Additional accomplishments:

- A detailed report on the first 4 years of Moving To Work was drafted and submitted to HUD Headquarters, and the Field Office. The PMHA Board approved a request to extend the PMHA's MTW program, which was subsequently submitted to HUD.

- c. Seek designation of the Community Estates neighborhood as a neighborhood eligible for Weed and Seed funding.

The PMHA's application was turned down early in the year. Further opportunities for designation are no longer possible, as Congress dramatically reduced funding for the Weed and Seed program.

- B. Increase employment rate of Section 8 and public housing families.
1. Provide incentives for tenants to generate higher income
 - a. Monitor impact of rents in public housing
A detailed report was completed for the Urban Institute consultants compiling a MTW report for HUD and Congress. The staff believe that changes are needed, but are awaiting word from HUD Headquarters regarding the request for the MTW time extension.
 - b. Continue working with social service agencies to target services to PMHA participants having zero incomes
This effort has been stifled by the funding and staff cutbacks adversely effecting local social agencies.
 2. Provide job training and work through PMHA maintenance/construction needs
 - a. Continue the maintenance/construction job training program by implementing the final year of the 2000 ROSS (Resident Opportunities for Self- Sufficiency) grant.
Program implementation has successfully continued, and has produced two levels of job trainees who are performing maintenance and construction work
 - b. Implement the computer training component of the ROSS grant
Classes have been provided on-site by Maplewood Career Center instructors. As attendance has been low, the next ROSS undertaking will provide for scholarships to existing computer training locations, rather than on-site.

Additional Accomplishments:

*The possibility of the PMHA taking on the role of a general contractor is being explored. The PMHA would use the job trainees for manpower, and perform work on houses owned by PADCorp needing rehabilitation work.
Received funding and began implementation of an additional 3-year ROSS grant that will expand employment opportunities for job trainees.*

**Attachment D
Resident Advisory Board Comments**

June 5, 2003

The first meeting of the Portage Metropolitan Housing Authority (PMHA) Participant Advisory Committee (PAC) began 5:30 P.M. on Thursday, June 5, 2002 at the Renaissance Place Community Room (5650 South Prospect Street, Ravenna). Representing the PMHA was Romaine Chritton, Public Housing HOPES Coordinator. Resident participants were:

<i>Section 8:</i>	Kim Lambert
<i>Public Housing:</i>	Danielle DeYoung Betty Baginski
<i>Portage Area Transitional Housing Staff:</i>	Crystal Reicosky-former resident Sylvia Henriss
<i>Community Resident-former resident:</i>	Jill Finch

An agenda, Public Housing Agency Plan Overview, and NOTICE PIH 2001-3 (HA) were mailed May 31, 2002, to those residents who specifically volunteered to serve on the PAC in response to newsletter outreach efforts; recruitment efforts during resident meetings; and Section 8 mailings. In addition, a flyer indicating meeting date/time and the agenda was posted on a bulletin board in the PMHA lobby. The flyer extended an invitation for participation to public housing residents and Section 8 tenants. Agenda items included:

- I. After Moving To Work....
- II. Marketing Your Development
- III. ROSS 2000 and 2003 RSDM-Family Application
- IV. Other
- VI. Adjournment

The primary discussion centered on self-sufficiency and the ROSS 2000 grant and the 2003 ROSS application. Those in attendance recommended and concurred that:

- Scholarships and/or related costs should be awarded to residents to meet their individual training needs as opposed to offering a structured training program.
- A holistic approach to achieving self-sufficiency could be adopted by offering supportive services that address nutrition, budgeting, GED, mental health, etc.
- The concept of offering in-home services such as counseling assessment and case-management services was viewed as being effective first steps in the self-sufficiency process.

June 23, 2003

The second meeting of the PMHA Participant Advisory Committee began 7:00 P.M. on Monday, June 23, 2003 at PMHA office, (2832 State Route 59, Ravenna). Representing the PMHA was Romaine Chritton, Public Housing HOPES Coordinator. Resident participants were:

Section 8: Kim Lambert
PATH Staff: Crystal Reicosky- former resident

Meeting notice, agenda, and HUD Survey information were also included in the PMHA June newsletter and posted in the PMHA lobby. Agenda items included:

- I. After Moving To Work...
- II. Marketing Your Development
- III. ROSS 2000 & 2003
- IV. Capital Funds
- V. Obstacles to Homeownership
- VI. Adjournment

After Moving to Work

Ms. Lambert and Ms. Reicosky felt that residents would benefit from having advanced notice (up to one year) of changes that would impact their household. They felt that annual re-certification might be most beneficial to residents rather than having to report on-going income/household changes.

Marketing Your Development

Both Ms. Lambert and Ms. Reicosky work with residents at Renaissance Place and Community Estates. The one concern they both expressed when marketing these two sites was the discontinuation of the contract with the Portage County's Sheriff's Department. They felt that it had a negative impact on safety. Both expressed that safety is a major factor, if not the most important factor, for promoting these two developments.

Ms. Reicosky recommended that additional lighting be installed at Renaissance Place. Ms. Chritton pointed out that two pole lights have been purchased and bids are being sought for installation.

Obstacles to Homeownership

Bad credit was identified as one of the major homeownership obstacles facing residents. Attendees went on to explain that persons with poor credit ratings were expected to pay higher interest rates on homes, cars, and other items than persons with good credit ratings. Additionally, low-paying jobs, lack of education to get a good paying job, men/women wage disparities, and lack of down payments were identified as obstacles.

Additionally, both Ms. Lambert and Ms. Reicosky indicated that residents do not know where to go for help with homeownership, and they do not understand the

jargon even when explained. They said they found the system to be overwhelming. Ms. Reicosky spoke from personal experience when she left Section 8 housing to purchase a mobile home.

Another issue facing potential homeowners is the fear things would break if they owned a home, and upkeep would be too expensive. Ms. Reicosky indicated that she does not know how to call or how to fix or repair the many systems that comprise a structure. Because over 80% of PMHA residents are single, female household heads, there is a feeling of gender inferiority when it comes to home repairs.

The meeting was adjourned at 8:15 p.m.

July 17, 2003

The third meeting of the Participant Advisory Committee was scheduled for the morning of July 17, 2003. Meeting time was 10:00 a.m. Meeting location was identified as being the Renaissance Place Community Room, 5650 South Prospect Street. Unfortunately, no one attended. Meeting information and agenda items were included in the newsletter and posted in the PMHA lobby.

August 4, 2003

The fourth meeting of the Participant Advisory Committee was scheduled to begin at 6:00 p.m. in the Renaissance Place Community Room. However, no public housing residents or Section 8 tenants arrived for the meeting. Meeting information and agenda items were included in the newsletter and posted in the PMHA lobby.

August 25, 2003

The fifth meeting of the Participant Advisory Committee began at 6:00 p.m. at the PMHA office, 2832 State Route 59, Ravenna. Romaine Chritton, Public Housing HOPES Coordinator, represented the PMHA. In attendance was Louise Ottix, a public housing resident of Renaissance Place.

Meeting notice and agenda were mailed to all Committee members prior to the meeting. Agenda items included:

- I. After Moving To Work...
- II. Marketing Your Development
- III. ROSS 2000 & 2003
- IV. Capital Funds
- V. Obstacles to Homeownership
- VI. Adjournment

Ms. Ottix offered her ideas and opinions as follows:

- Renaissance Place residents miss the Sheriff's Patrol service. Louise feels that there are problems with visitors to Renaissance Place as opposed to

- the residents. Recommends that new residents receive telephone number of the Sheriff's Office.
- Expressed concerns about having difficulty locking windows.
 - Suggests that rent not be raised for at least three months following income increase if MTW should not be extended.
 - Recommends that no rent be charged until people earn an amount equal to at least 41 hours of minimum wage rate.
 - Suggests that household expenses be considered when determining rent. For example, Louise had to pay \$100 for her granddaughter to take a course over the summer, which would enable her to graduate from high school.
 - To market developments (specifically Renaissance Place) advertise that they are clean and repairs are fixed in a timely manner. Stress that on-site laundry facilities are available.
 - Recommended some type of ground covering be added to the playground area, since kids currently get muddy and dirty.
 - Recommended lights are installed by the playground area, because children play there at dusk.

The meeting was adjourned at 7:05 p.m.

October 6, 2003

The sixth meeting of the Participant Advisory Committee began at 6:00 p.m. at the PMHA office, 2832 State Route 59, Ravenna. Anna Doty, Project Manager, represented the PMHA. In attendance were Jane Arner (Section 8), Linda Near (Etna House), Pat Dorian, Tracy Petitt and Tammy Bridge from Townsquare Villas.

Meeting notice, agenda and a copy of the Condensed Version of the proposed 2004 Agency Plan were mailed to all Committee members prior to the meeting. Agenda items included:

- I. Review of the 2004 Agency Plan
- II. Review of Capital Fund Proposed Budget
- III. Other Issues
- IV. Adjournment

Jane Arner provided a binder containing information about Earned Income Disability program and ideas for rent incentives for consideration under the Moving-To-Work demonstration program (the information was forwarded to Christie Anderson, Director, on October 7th).

Ms. Arner suggested the word "safe" be included in PMHA's mission statement when referring to housing. She complimented the waiting list criteria used by the PMHA.

Ms. Near wanted to know why the PMHA does not expand its background check to include the FBI. Ms. Doty explained that the PMHA is researching how FBI records can be utilized for screening. Ms. Near also recommended that the PMHA include in its newsletter the importance of not moving people who fall and waiting for paramedics to do so. Ms. Doty said she would forward this information to the newsletter developer.

Other items included maintenance issues that were recorded and forwarded to the Maintenance Department by Ms. Doty on October 7th.

The meeting was adjourned at 7:15 p.m.

October 7, 2003 Public Hearing

The Agency Plan Public Hearing was held at the PMHA Office, at 5:00 p.m., Tuesday, October 7, 2003. Citizens attending included Public Housing resident Linda Near and Section 8 participant Jane Arner. Christie Anderson, PMHA Director, conducted the meeting.

Ms. Anderson stated the purpose of the five-year Agency Plan, the Annual Plan, and the public review process. Ms. Anderson reviewed the components of the plan. Ms. Anderson reviewed the five-year goals and objectives of the PMHA and also the Mission Statement. Ms. Arner questioned whether the word "decent" in the Mission Statement included safe housing. Ms. Anderson stated that the word "decent" was intended to incorporate safe housing. Ms. Anderson explained that there are no significant changes to activities or policies proposed for the year 2004, given the uncertainty of the continuation of the PMHA's Moving to Work program.

Ms. Anderson then explained the history and objectives of HUD's Moving to Work program. She noted that it is slated to expire in March 2004, and that HUD has indicated that extensions will not be granted. Ms. Anderson stated that the staff hope to submit requests for waivers in order to continue offering the significant Moving to Work features. Ms. Arner offered to contact our local Congressman in order to encourage their support of the continuation of the Moving to Work program. Ms. Anderson answered questions about specific activities included in the 2004 strategy.

Ms. Anderson stated that she reviewed the information provided earlier by Ms. Arner regarding consideration of an earned income disregard for the disabled. Ms. Anderson noted that the PMHA's rent calculations under the Moving to Work program have always been more favorable than HUD's standards with regard to rent calculations. However, she noted that HUD's earned income disregard (EID) is a new feature that is more generous for the disabled participants than the PMHA's Moving to Work features. She indicated her willingness to present a request to the Board to modify the Moving to Work rent policy in order to include this provision in the Section 8 rent calculation. She noted that according to the

MTW agreement, an analysis was necessary in order to evaluate the impact of a rent policy change on both the agency and the participants. She indicated that Section 8 Manager Pamela Nation had agreed to conduct this analysis prior to the Board meeting. Ms. Anderson noted that the agency would need to consider the number of participants affected and the subsidy cost to the agency. She thanked Ms. Arner for providing her with this extensive information.

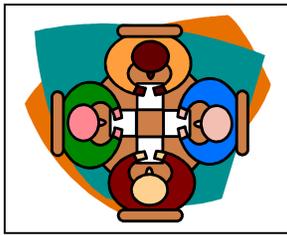
Ms. Anderson then reviewed the 2003 accomplishments found in attachment C. Ms. Arner suggested that the PMHA make a greater effort to publicize its accomplishments, especially with regard to its role with homeownership. She offered to be the subject of a story for the resident newsletter, in order to spread the word about the benefits of the Homeownership program.

Mrs. Near requested information on the tenant screening procedures used by the PMHA. Ms. Anderson explained the procedures and noted that currently about 10% of the applicants on the waiting list are rejected for criminal activity. Mrs. Near felt that there was a need to be even more aggressive in screening for undesirable residents. Both residents asked for information regarding needs on the waiting list, especially with regard to the elderly population. Ms. Anderson noted that the waiting list for seniors is very small, due to the presence of a large quantity of subsidized housing for seniors.

In response to an inquiry by Ms. Arner, Ms. Anderson explained the organization of the PMHA Board. Ms. Arner complemented the efforts of the Section 8 staff, and Carol Marotta in particular. Mrs. Near complemented Anna Doty's handling of the resident meeting the previous meeting.

Ms. Anderson offered to highlight the activities proposed under the capital improvement plans for the next five years. Both attendees indicated that the plan had been thoroughly discussed at the resident meeting. Ms. Anderson noted that the PMHA is anticipating the receipt of \$85,000 to be added to the capital fund program as a result of the sale of vacant lots in Windham. She explained that the proceeds from the sale will be used for window and roof replacement of the scattered site homes, which will hopefully, free money for other improvements that were eliminated due to funding cuts.

The public hearing concluded at 6:40 p.m.



**PMHA Resident Participant
Advisory Committee
2003**

Section 8		
Jane Arnor	10415 State Route 303 Windham, Ohio	330/296-2857
Kim Lambert	634 South Meridian St. Ravenna OH 44266	330/296-2857
Michael A. Smith	522 Ravenna Avenue Ravenna, OH 44266	
Townsquare Villas		
Pat Dorian	1352 Townsquare Dr. #2 Kent, OH 44240	
Tracy Pettitt	1352 Townsquare Dr. #1 Kent, OH 44240	330/673-4106
Tammy Bridge	1354 Townsquare Dr. #2 Kent, OH 44240	330/6770124
Community Estates		
Jo Ann Svoboda	6481 S. Fairfield St. Ravenna, OH 44266	
Scattered Sites		
Holly Parsons	524 Lafayette Avenue Ravenna, OH 44266	
Eastowne Manor		
John Elgin Sherwood	777 Eastowne Drive, Apt. 106 Ravenna, OH 44266	330/296-9718
Renaissance Place		
Elizabeth Marker	5650 South Prospect St. #114 Ravenna, OH 44266	330/298-1184
Louise M. Ottrix	3839 McElrath Ravenna, OH 44266	330/296-4389
Danielle DeYoung	5650 South Prospect St. #202 Ravenna, OH 44266	
Bettie Baginski	5650 South Prospect St. #113 Ravenna, OH 44266	
Etna House		
Linda Near	219 ½ West Main Street Apt. 306 Ravenna, OH 44266	330/297-9508
Community Representative		
Crystal Reicosky (PATH Staff)	10039 State Route 700 Lot 37 Mantua, OH 44255	330/296-0024

Attachment F
Resident Member on the PHA Governing Board

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

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

Teresa Carr

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

Elected

Appointed

C. The term of appointment is (include the date term expires): October 31, 2006

D.

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

- the PHA is located in a State that requires the members of a governing board to be salaried and serve on a full time basis
- the PHA has less than 300 public housing units, has provided reasonable notice to the resident advisory board of the opportunity to serve on the governing board, and has not been notified by any resident of their interest to participate in the Board.
- Other (explain):

B. Date of next term expiration of a governing board member:

June 20, 2004

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

Judge Joseph Kainrad
Portage County Judge of Common Pleas
Portage County Courthouse
203 West Main Street
Ravenna, OH 44266

Attachment G

Resident Satisfaction Survey Follow-Up Plan

Communication

Activities will be implemented to increase communication between the PMHA staff and residents as follows:

- PMHA staff (Maintenance and Administrative) will wear picture identification badges and clothing (caps and shirts) with the PMHA logo when working at the developments.
- The PMHA will continue to publish pictures of the Maintenance staff in the monthly newsletter on a quarterly basis.
- A calendar will continue to be included with the monthly resident newsletter listing resident activities and opportunities such as resident meetings, training classes, etc.
- The PMHA will continue to conduct written surveys of residents to inform them of the resident activities monies, and to seek guidance on the expenditures of these funds.
- Articles will be included in the newsletter to inform residents about the activities of the Resident Councils as a way of encouraging residents to participate and form additional councils.
- Meetings of the Resident Advisory Council, which allows residents to participate in the planning and evaluation of ROSS activities, will be held at least quarterly. An invitation will be posted in the newsletter allowing participation among all residents.
- New residents will continue to receive binders containing information about the PMHA, including training opportunities, community resources and the PMHA Annual Plan goals and objectives.

Attachment H

Component 10 (B) Voluntary Conversion Initial Assessments

- a. How many of the PHA's developments are subject to the Required Initial Assessments? 7
- b. How many of the PHA's developments are not subject to the Required Initial Assessments based on exemptions (e.g., elderly and/or disabled developments not general occupancy projects)? 3
- c. How many Assessments were conducted for the PHA's covered developments? 5 multi-family general occupancy and 2 elderly
- d. Identify PHA developments that may be appropriate for conversion based on the Required Initial Assessments:

Development Name	Number of Units
N/A	

- e. If the PHA has not completed the Required Initial Assessments, describe the status of these assessments. Assessments have not yet been completed for the 2 scattered site developments, as an attempt is being made to identify the projects' expenses by individual property.

Summary of Initial Assessment

An analysis of the cost incurred by HUD in operating the PMHA's Section 8 program compared to the public housing program was conducted, based on PMHA's actual costs for year 2000. At present, the analysis has been prepared for all of the PMHA's multi-family developments, including the senior buildings, but has not been completed for the individual scattered site properties.

The PUM cost of operating a public housing multi-family unit in 2000 was \$425. The cost incurred by PMHA in operating the Section 8 program was \$420 PUM. Although the costs incurred are similar for both programs, HUD invests much more per unit funding into the Section 8 program

In terms of program revenues, the PMHA received \$308 PUM for public housing in 2000 and \$432 for each Section 8 unit. This subsidy difference is attributable to the fact that public housing operating costs are offset in part by tenant rents. On the other hand, in the Section 8 program, HUD covers all \$420 in costs, as the tenant rents benefit the landlord, and do not offset program costs such as is the case with public housing rents. A conversion of all family multi-family developments to Section 8 assistance would cost

HUD at least an additional \$260,400 annually. Therefore, in terms of conserving government funds, it is more appropriate to retain PMHA's 305 housing units under the public housing program.

Two of PMHA's public housing developments have historically incurred a financial loss, and pose a drain on the PMHA's public housing program. When applying Section 8 rents to each public housing development, based on Section 8 rent reasonableness standards, these two developments would fare better financially with subsidies funded by the Section 8 program. However, besides the fact that a conversion to vouchers would increase HUD's cost, Section 8 assistance would be risky for these properties, as they both suffer from marketing problems. As stated in the PMHA's initial Moving To Work application, the future use and ownership of these properties require further study, as a Section 8 conversion is not the most desirable alternative.

At this time, the PMHA has determined that a voluntary conversion of its multi-family public housing stock to vouchers is inappropriate, as removal of the multi-family developments would not meet the necessary conditions for voluntary conversion.

Annual Statement/Performance and Evaluation Report

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

HA Name:

Portage Metropolitan Housing Authority

Grant Type and Number: OH12PO3150100
Capital Fund Program Grant No. 2000

Replacement Housing Factor Grant No. 2000 OH12PO3150100
FFY of Grant Approval: 2000

Original Annual Statement Reserve for Disasters/Emergencies Revised Annual statement/Revision Number: _____
 Performance and Evaluation report for Program Year Ending _____ Final Performance and Evaluation Report 30-JUN

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGP Funds	0.00	0.00	0.00	0.00
2	1406 Operations (May not exceed 10% of line 20)	29,071.00	58,267.00	58,267.00	58,267.00
3	1408 Management Improvements	68,892.00	83,983.35	83,983.35	83,983.35
4	1410 Administration	49,761.00	57,014.41	57,014.41	57,014.41
5	1411 Audit	1,500.00	1,700.00	1,700.00	1,700.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	0.00	7,239.72	7,239.72	7,239.72
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	91,880.00	52,816.50	52,816.50	52,816.50
10	1460 Dwelling Structures	203,000.00	209,150.56	209,150.56	209,150.56
11	1465.1 Dwelling Equipment - Nonexpendable	11,250.00	44,805.77	44,805.77	44,805.77
12	1470 Nondwelling Structures	2,000.00	1,770.00	1,770.00	1,770.00
13	1475 Nondwelling Equipment	26,500.00	46,434.06	46,434.06	46,434.06
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	21,327.00	19,495.63	19,495.63	19,495.63
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1498 Mod used for Development	0.00	0.00	0.00	0.00
19	1502 Contingency (may not exceed 8% of line 20)	6,826.00	0.00	0.00	0.00
20	Amount of Annual Grant (Sum of Lines 2-19)	512,007.00	582,677.00	582,677.00	582,677.00
21	Amount of line 20 Related to LBP Activities	0.00	0.00	0.00	0.00
22	Amount of line 20 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
23	Amount of line 20 Related to Security	5,000.00	5,000.00	0.00	0.00
24	Amount of line 20 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

Signature of Executive Director & Date:

X Director, June 30, 2003

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

X

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

PHA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000	Federal FY of Grant: 2000
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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA-Wide	Operations	1406		29,071.00	58,267.00	58,267.00	58,267.00	
HA-Wide	Management Improvements	1408						
	a. Management/Residents Improvements			5,000.00	4,631.11	4,631.11	4,631.11	
	b. Develop Job Training and Bus. Deve.			28,139.00	35,753.00	35,753.00	35,753.00	
	c. Coordinator of Social Services for Drug Elimination			35,753.00	35,890.00	35,890.00	35,890.00	
	d. Administrative/Management Improve				7,709.24	7,709.24	7,709.24	
	Total for Management Improvements			68,892.00	83,983.35	83,983.35	83,983.35	
HA-Wide	Administration	1410						
	a. Salries	1410.1		34,632.69	40,535.39	40,535.39	40,535.39	
	b. Fringe Benefits	1410.9		13,928.31	15,583.79	15,583.79	15,583.79	
	c. Advertising	1410.19		1,200.00	895.23	895.23	895.23	
	Total for Administration			49,761.00	57,014.41	57,014.41	57,014.41	
HA-Wide	Fees & Costs	1430						
	A & E Services				7,239.72	7,239.72	7,239.72	
	Total for Fees & Costs			0.00	7,239.72	7,239.72	7,239.72	
HA-Wide	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Equipment	1475						
	File Cabinet		2	1,500.00	692.00	692.00	692.00	
	Office Equipment			3,000.00	19,278.38	19,278.38	19,278.38	
	Trailer				1,385.00	1,385.00	1,385.00	
	Dump Liner				2,900.00	2,900.00	2,900.00	
	Maintenance Vehicle		1	22,000.00	22,178.68	22,178.68	22,178.68	Moved from 707
	Total for Nondwelling Equipment			26,500.00	46,434.06	46,434.06	46,434.06	Moved from 707
HA-Wide	Relocation Cost	1495.1		0.00	0.00	0.00	0.00	
HA-Wide	Contingency	1502		6,826.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

X Director, June 30, 2003

X

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

PHA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000	Federal FY of Grant: 2000
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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)	
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)		
OH31-01 Athena Gardens	Site Improvement	1450							
	Total for Site Improvement			0.00	0.00	0.00	0.00		
	Dwelling Structures	1460							
	Replace Tile in Kitchens and Baths	1460.13	All	15,000.00	21,102.56	21,102.56	21,102.56		
	Replace Range Hoods		25	5,000.00	0.00	0.00	0.00		
	Replace Windows	1460.14	125	52,250.00	56,895.50	56,895.50	56,895.50		
	Total for Dwelling Structures			72,250.00	77,998.06	77,998.06	77,998.06		
	Dwelling Equipment - Nonexpendable	1465.1							
	Replace Range Hoods	1465.11	25		2,470.45	2,470.45	2,470.45		
	Ranges and Refrigerators	1465.11	25 ea		16,250.00	16,250.00	16,250.00		
	Total for Dwelling Equipment - Nonexp.				0.00	18,720.45	18,720.45	18,720.45	
	Nondwelling Structures	1470							
	Total for Nondwelling Structures				0.00	0.00	0.00	0.00	
	Nondwelling Equipment	1475							
Total for Nondwelling Equipment				0.00	0.00	0.00	0.00		

Signature of Executive Director & Date:
X Director, June 30, 2003

Signature of Public Housing Director/Office of Native American programs Administrator & Date:
X

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

PHA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000	Federal FY of Grant: 2000
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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-01 Community Estates	Site Improvement	1450						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	Dwelling Structures	1460						
	Replace Tile in Kitchens and Bath	1460.13	All	17,500.00	18,000.00	18,000.00	18,000.00	
	Total for Dwelling Structures			17,500.00	18,000.00	18,000.00	18,000.00	
	Dwelling Equipment - Nonexpendable	1465.1						
	Ranges and Refrigerators	1465.11	29 ea		18,850.00	18,850.00	18,850.00	
	Total for Dwelling Equipment - Nonexp.			0.00	18,850.00	18,850.00	18,850.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
Nondwelling Equipment	1475							
Total for Nondwelling Equipment				0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

X Director, June 30, 2003

X

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

PHA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000	Federal FY of Grant: 2000
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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
	Site Improvement	1450						
OH31-02 Scattered Sites	3701 Duffield St.							
	Drainage	1450.11	125 LF	1,500.00	0.00	0.00	0.00	Moved to 707
	Replace Fence	1450.11	200 LF	3,000.00	4,381.50	4,381.50	4,381.50	
	Repair Driveway	1450.11	1	2,500.00	0.00	0.00	0.00	Moved to 707
	Fill Ditch Behind Unit	1450.11	110 LF	4,250.00	0.00	0.00	0.00	Moved to 707
	Total for Site Improvement			11,250.00	4,381.50	4,381.50	4,381.50	
	Dwelling Structures	1460						
	3701 Duffield St.							
	Replace Gutters	1460.14	85 LF	800.00	0.00	0.00	0.00	Moved to 707
	Insulation	1460.21	As Needed	1,000.00	0.00	0.00	0.00	Moved to 707
	Upgrade Electric	1460.15	As Needed	1,500.00	0.00	0.00	0.00	Moved to 707
	Rehab Entire Kitchen	1460.11	All	10,000.00	0.00	0.00	0.00	Moved to 707
	Range, Hood, and Refrigerator	1460.11	1 ea.	1,000.00	0.00	0.00	0.00	Moved to 707
	Total for Dwelling Structures			14,300.00	0.00	0.00	0.00	
	Dwelling Equipment - Nonexpendable	1465.1						
	Range, Hood, and Refrigerator	1465.11	1 ea.		735.32	735.32	735.32	
	Total for Dwelling Equipment - Nonexp.			0.00	735.32	735.32	735.32	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	Nondwelling Equipment	1475						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

X Director, June 30, 2003

X

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

PHA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000	Federal FY of Grant: 2000
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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-04 Eastowne Manor	Site Improvement	1450						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	Dwelling Structures	1460						
	Replace Floor Tile	1460.13	All	20,000.00	19,300.00	19,300.00	19,300.00	
	Install Hand Rail - East Side	1460.14	1	2,500.00	1,640.00	1,640.00	1,640.00	
	Total for Dwelling Structures			22,500.00	20,940.00	20,940.00	20,940.00	
	Dwelling Equipment - Nonexpendable	1465.1						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
Nondwelling Equipment	1475							
Total for Nondwelling Equipment				0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:
X Director, June 30, 2003

Signature of Public Housing Director/Office of Native American programs Administrator & Date:
X

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

PHA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000	Federal FY of Grant: 2000
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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-09 Heritage Knolls	Site Improvement	1450						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	Dwelling Structures	1460						
	Replace Bath Tubs	1460.2	30	45,000.00	0.00	0.00	0.00	Savings Moved to 707
	Total for Dwelling Structures			45,000.00	0.00	0.00	0.00	
	Dwelling Equipment - Nonexpendable	1465.1						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	Nondwelling Equipment	1475						
Total for Nondwelling Equipment			0.00	0.00	0.00	0.00		

Signature of Executive Director & Date:
X **Director, June 30, 2003**

Signature of Public Housing Director/Office of Native American programs Administrator & Date:
X

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

PHA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000	Federal FY of Grant: 2000
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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
	Site Improvement	1450						
OH31-10 Ravenna Scattered	Fence in Back Yard	1450.11	2480 LF	46,130.00	32,500.00	32,500.00	32,500.00	
	Total for Site Improvement			46,130.00	32,500.00	32,500.00	32,500.00	
	Dwelling Structures	1460						
	Replace Counter tops	1460.11	10	12,000.00	5,500.00	5,500.00	5,500.00	
	Total for Dwelling Structures			12,000.00	5,500.00	5,500.00	5,500.00	
	Dwelling Equipment - Nonexpendable	1465.1						
	Replace Ranges	1465.11	10	5,250.00	2,800.00	2,800.00	2,800.00	Moved Range hoods to 707
	Replace Refrigerators	1465.11	10	6,000.00	3,700.00	3,700.00	3,700.00	
	Total for Dwelling Equipment - Nonexp.			11,250.00	6,500.00	6,500.00	6,500.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	Nondwelling Equipment	1475						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

X Director, June 30, 2003

X

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

Development Number/Name HA-Wide Activities		General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)	
					Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)		
		Site Improvement		1450						
OH31-15 Acquisition Rehab	3036 Polly Rd.	Concrete Drive and Drainage	1450.11	1146 LF	10,000.00	4,420.00	4,420.00	4,420.00		
	3138 Polly Rd.	Concrete Drive	1450.11	1100 LF	7,500.00	0.00	0.00	0.00	Moved to 707	
	9500 St. Rt. 700	Concrete Partial Drive	1450.11	1200 LF	6,500.00	5,740.00	5,740.00	5,740.00		
		Gravel Remaining Drive	1450.11	350 LF	3,000.00	0.00	0.00	0.00		
	1391 Fairview Rd.	Concrete Drive	1450.11	85 LF	7,500.00	5,775.00	5,775.00	5,775.00		
	Total for Site Improvement					34,500.00	15,935.00	15,935.00	15,935.00	
			Dwelling Structures		1460					
	3147 Denny Rd.	Replace Gutters and Downspouts	1460.14	all	4,200.00	1,015.00	1,015.00	1,015.00		
	3036 Polly Rd.	Replace Windows	1460.14	2	2,000.00	0.00	0.00	0.00	completed prior	
		Replace Gutters and Downspouts	1460.14			750.00	750.00	750.00		
3138 Polly Rd.	Replace Windows(Slider,LVrm,Bedrm)	1460.14	4	3,250.00	0.00	0.00	0.00	Moved to 707		
	Replace Kit. Cabinets & Counter Top	1460.11	All	10,000.00	0.00	0.00	0.00	Moved to 707		
Total for Dwelling Structures					19,450.00	1,765.00	1,765.00	1,765.00		
		Dwelling Equipment - Nonexpendable		1465.1						
Total for Dwelling Equipment - Nonexp.					0.00	0.00	0.00	0.00		
		Nondwelling Structures		1470						
3036 Polly rd.	Install Shed	1470.11	1	2,000.00	1,770.00	1,770.00	1,770.00			
Total for Nondwelling Structures					2,000.00	1,770.00	1,770.00	1,770.00		
		Nondwelling Equipment		1475						
Total for Nondwelling Equipment					0.00	0.00	0.00	0.00		

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

X **Director, June 30, 2003**

X

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

PHA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000	Federal FY of Grant: 2000
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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-06 Etna House	Site Improvement	1450						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	Dwelling Structures	1460						
	HVAC Unit	1460.16			3,040.00	3,040.00	3,040.00	
	Total for Dwelling Structures			0.00	3,040.00	3,040.00	3,040.00	Moved from 706
	Dwelling Equipment - Nonexpendable	1465.1						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	Nondwelling Equipment	1475						
HVAC Unit	1475.11			0.00	0.00			
Total for Nondwelling Equipment				0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:
X **Director, June 30, 2003**

Signature of Public Housing Director/Office of Native American programs Administrator & Date:
X

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

PHA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150100 Capital Fund Program Grant No: 2000 Replacement Housing Factor Grant No: 2000	Federal FY of Grant: 2000
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Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
	Site Improvement	1450						
OH31-05 Town Square Villas	Total for Site Improvement			0.00	0.00	0.00	0.00	
	Dwelling Structures	1460						
	Replacement of Window	1460.14			79,800.00	81,907.50	53,711.84	Moved from 50101 to obligate savings
	Total for Dwelling Structures			0.00	79,800.00	81,907.50	53,711.84	
	Dwelling Equipment - Nonexpendable	1465.1						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	Nondwelling Equipment	1475						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date: X Director, June 30, 2003	Signature of Public Housing Director/Office of Native American programs Administrator & Date: X
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REVISED IMPLEMENTATION SCHEDULE 50100

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFRHF) Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
OH31-1 Athena Gardens	06/30/00	12/31/00		03/31/01	06/30/03		Environmental Review Compliance
OH31-01 Community Estates	06/30/00	06/30/01		03/31/01	12/31/03		Environmental Review Compliance
OH31-2 Scattered Sites	09/30/00	12/31/01		06/30/01	12/31/03		Environmental Review Compliance
OH31-4 Eastowne Manor	06/30/00	06/30/01		03/31/01	12/31/03		Environmental Review Compliance
OH31-05 Town Square Villas		12/31/01			06/30/03		Moved from 50101 to 50100 to Obligate Savings
OH31-09 Heritage Knolls	09/30/00	06/30/01		06/30/01	12/31/03		Environmental Review Compliance
OH31-10 Ravenna Scattered	09/30/00	12/31/01		06/30/01	12/31/03		Environmental Review Compliance
OH31-15 Acquisition Rehab	06/30/00	09/31/01		03/31/01	12/31/03		Environmental Review Compliance
HA-Wide Mgmt. Impr.	12/31/01	09/30/02		12/31/01	12/31/03		
Administration	12/31/01	09/30/02		12/31/01	12/31/03		
Fees & Costs	12/31/01	09/30/02		12/31/01	12/31/03		
Contingency	12/31/01	09/30/02		12/31/01	12/31/03		

Signature of Executive Director & Date:

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MTW RENT CHANGE FOR EARNED INCOME DISREGARD FOR SECTION 8 DISABLED ADULTS

Background

In January 2001, HUD adopted a regulation that required housing authorities to temporarily disregard increases to earned income for qualified disabled Section 8 participants. As this feature is more generous than the PMHA's MTW phased-in rent feature for employment income, a Section 8 participant, who is a member of the Resident Advisory Committee, requested that the PMHA consider adopting this feature. The proposal was discussed at the October 6, 2003 public hearing. An impact analysis conducted by the Section 8 Manager, indicated that the inclusion of this feature would not be significantly detrimental to the Section 8 program. The revision was adopted by the PMHA Board October 16, 2003.

Eligible Participants

1. Qualified/disabled families whose annual income increases as a result of employment of a family member who is a person with disabilities who was previously unemployed for 1+ years prior to employment;
2. Qualified/disabled families whose annual income increases as a result of new employment or increased earnings of a family member who is a person with disabilities, during or within six months after receiving benefits or services under any state program for TANF funded under part of the Social Security Act.

Phases of Disallowances

1. Initial 12-month exclusion. 12 months beginning on date person with disabilities is first employed or the family first experiences an increase in annual income attributable to employment.
2. 2nd 12-month exclusion and phase-in. During the 2nd cumulative 12-month period, 50% of any increase in income of such family member as a result of employment over income of that family member prior to the beginning of such employment is excluded.
3. There is a maximum 4-year disallowance.

Implementation

The disregard will be implemented upon submission of the revised Section 8 Administrative Plan to the Cleveland HUD Field Office. The policy will be implemented for qualified Section 8 participants at their next recertification period.

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

HA Name:
 Portage Metropolitan Housing Authority

Grant Type and Number: OH12PO3150101
 Capital Fund Program Grant No: 2001
 Replacement Housing Factor Grant No. CFP of Grant Approval:
 OH12PO3150101 2001 2001

Original Annual Statement Reserve for Disasters/Emergencies Revised Annual statement/Revision Number _____
 Performance and Evaluation report for Program Year Ending Jun-03 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGP Funds	0.00	0.00	0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)	7,742.00	68,391.84	68,391.84	8,117.14
3	1408 Management Improvements	77,930.00	93,579.08	93,579.08	56,214.90
4	1410 Administration	63,410.00	59,578.50	59,578.50	33,496.30
5	1411 Audit	1,500.00	2,000.00	2,000.00	2,000.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	0.00	482.10	482.10	482.10
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	88,000.00	115,011.69	115,011.69	59,522.47
10	1460 Dwelling Structures	244,700.00	195,867.06	195,867.06	156,862.87
11	1465.1 Dwelling Equipment - Nonexpendable	4,250.00	2,398.00	2,398.00	2,398.00
12	1470 Nondwelling Structures	0.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	0.00	25,380.26	25,380.26	6,649.26
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	20,000.00	33,096.47	33,096.47	33,096.47
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1498 Mod used for Development	0.00	0.00	0.00	0.00
19	1502 Contingency (may not exceed 8% of line 20)	4,475.00	0.00	0.00	0.00
20	Amount of Annual Grant (Sum of Lines 2-19)	512,007.00	595,785.00	595,785.00	358,839.51
21	Amount of line 19 Related to LBP Activities	0.00	0.00	0.00	0.00
22	Amount of line 19 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
23	Amount of line 19 Related to Security	5,000.00	5,000.00	0.00	0.00
24	Amount of line 19 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

Signature of Executive Director & Date:
X **Director, June 30, 2003**

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:
X

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.
 (2) To be completed for the Performance and Evaluation Report.

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

Part II: Supporting Pages

Development Number/Name		General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
HA-Wide Activities	Original				Revised (1)	Funds Obligated (2)	Funds Expended (2)		
PHA Name:		Grant Type and Number OH12PO3150101 Capital Fund Program Grant No. 2001 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001				
HA-Wide		Operations	1406		7,742.00	68,391.84	68,391.84	8,117.14	
HA-Wide		Management Improvements	1408						
		Resident Security			5,000.00	5,000.00	5,000.00	1,478.45	
		Develop Job Training & Business			35,000.00	32,580.00	32,580.00	10,593.65	
		Develop Programs			37,930.00	40,350.00	40,350.00	39,684.04	
		Coordinator of Social Services for Drug Elimination				15,649.08	15,649.08	4,458.76	
		Administrative Management Improvements							
		Total for Management Improvements			77,930.00	93,579.08	93,579.08	56,214.90	
HA-Wide		Administration	1410						
		a. Salaries	1410.1		46,130.00	44,327.50	44,327.50	25,151.81	
		b. Fringe Benefits	1410.9		15,930.00	14,051.00	14,051.00	7,422.66	
		c. Advertising	1410.19		1,350.00	1,200.00	1,200.00	921.83	
		Total for Administration			63,410.00	59,578.50	59,578.50	33,496.30	
HA-Wide		Fees & Costs	1430						
		a. Architect			0.00	482.10	482.10	482.10	
		Total for Fees & Costs			0.00	482.10	482.10	482.10	
HA-Wide		Nondwelling Structures	1470						
		Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide		Nondwelling Equipment	1475						
		a. Office Equipment				25,380.26	25,380.26	6,649.26	
		Total for Nondwelling Equipment			0.00	25,380.26	25,380.26	6,649.26	
HA-Wide		Relocation Cost	1495.1		0.00	0.00	0.00	0.00	
HA-Wide		Contingency	1502		4,475.00	0.00	0.00	0.00	
Signature of Executive Director & Date:					Signature of Public Housing Director/Office of Native American programs Administrator & Date:				
Director, June 30, 2003					X				

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

Development Number/Name HA-Wide Activities		General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
					Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-01 Athena Gardens		Site Improvement	1450						
		Total for Site Improvement			0.00	0.00	0.00	0.00	
		Dwelling Structures	1460						
		Replace Front and Back Entrance Doors and Shed Doors	1460.21	75	42,400.00	30,286.00	30,286.00	30,286.00	
		Willmar - deadbolts & latches				732.90	732.90	732.90	
		Chad - hole covers for doors				57.64	57.64	57.64	
		Total for Dwelling Structures			42,400.00	31,076.54	31,076.54	31,076.54	
		Dwelling Equipment - Nonexpendable	1465.1						
		Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
		Nondwelling Structures	1470						
		Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
		Nondwelling Equipment	1475						
		Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	
Signature of Executive Director & Date:					Signature of Public Housing Director/Office of Native American programs Administrator & Date:				
Director, June 30, 2003					X				

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

PHA Name:		Grant Type and Number OH12PO3150101 Capital Fund Program Grant No. 2001 Replacement Housing Factor Grant No. 2001				Federal FY of Grant: 2001		Status of Proposed Work (2)
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-01 Community Estates	Site Improvement	1450						
	Replace Fiber in Sandbox	1450.14	250 SF	5,000.00	1,976.00	1,976.00	1,976.00	
	Install Retaining Wall	1450.11	250 LF	25,000.00	7,150.00	7,150.00	7,150.00	
	Install Security Fence	1450.11	300 LF	10,000.00	2,500.00	2,500.00	2,500.00	
	Replace patio pads & fencing				77,120.82	77,120.82	26,112.60	
	Total for Site Improvement			40,000.00	88,746.82	88,746.82	37,738.60	
	Dwelling Structures	1460						
	Install Security Screens in Kitchen	1460.19	28	12,000.00	0.00	0.00	0.00	
	Install Security Screens in Bedroom	1460.19	29	12,000.00	0.00	0.00	0.00	
	Replace Front Storm Doors	1460.21	29	12,000.00	11,341.40	11,341.40	11,341.40	
	Replace Medicine Cabinets	1460.12	19	3,500.00	1,044.07	1,044.07	1,044.07	
	Replace Front, Back & Shed Doors	1460.21	87		39,039.12	39,039.12	39,039.12	
	Willmar - deadbolts & latches				1,114.66	1,114.66	1,114.66	
	Chad - hole covers for doors				86.71	86.71	86.71	
	Total for Dwelling Structures			39,500.00	52,625.96	52,625.96	52,625.96	
Dwelling Equipment - Nonexpendable	1465.1							
Total for Dwelling Equipment - Nonexp.				0.00	0.00	0.00	0.00	
Nondwelling Structures	1470							
Total for Nondwelling Structures				0.00	0.00	0.00	0.00	
Nondwelling Equipment	1475							
Total for Nondwelling Equipment				0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Director, June 30, 2003

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

X

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

PHA Name: Grant Type and Number OH12PO3150101 Federal FY of Grant: 2001
 Capital Fund Program Grant No. 2001
 Replacement Housing Factor Grant No. 2001

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
	Site Improvement	1450						
OH31-02 Scattered Sites 224 W. Highland St Rt 183	Replace Main Sewer Line Foundation Waterproofing	1450.13	150 LF	16,500.00	0.00 11,875.00	11,875.00	8,631.00	Line item not needed Moved up from 501-02 to obligate savings
	Total for Site Improvement			16,500.00	11,875.00	11,875.00	8,631.00	
	Dwelling Structures	1460						
213 S. Willow	Replace Kitchen	1460.11	All	12,000.00	0.00	0.00	0.00	
W Elm St.	Replace Roof	1460.18	2	35,000.00	8,800.00	8,800.00	8,800.00	
1339 Franklin	Replace Side Doors	1460.21	2	1,000.00	791.56	791.56	791.56	
227 S. Walnut	Rehab Kitchen	1460.21			7,905.00	7,905.00	0.00	
	Total for Dwelling Structures			48,000.00	17,496.56	17,496.56	9,591.56	
	Dwelling Equipment - Nonexpendable	1465.1						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	Nondwelling Equipment	1475						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Director, June 30, 2003

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

Page 4 of 9

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

PHA Name:		Grant Type and Number OH12PO3150101 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-04 Eastowne Manor	Site Improvement	1450						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	Dwelling Structures	1460						
	Replace Unit Door Locks	1460.19	50	10,000.00	9,632.00	9,632.00	9,632.00	
	Replace Unit Doors & Peepholes	1460.21	50		15,793.00	15,793.00	15,793.00	
	Total for Dwelling Structures			10,000.00	25,425.00	25,425.00	25,425.00	
	Dwelling Equipment - Nonexpendable	1465.1						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
Nondwelling Equipment	1475							
Total for Nondwelling Equipment				0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Director, June 30, 2003

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

X

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

PHA Name:		Grant Type and Number OH12PO3150101 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001				
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)	
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)		
OH31-05 Town Square	Site Improvement	1450							
	Additional Concrete Work/Pads	1450.14	10	16,500.00	0.00			Moved to 50102	
	Total for Site Improvement			16,500.00	0.00	0.00	0.00		
	Dwelling Structures	1460							
	Replace Medicine Cabinets	1460.12	30	5,000.00	2,805.00	2,805.00	2,805.00	Moved to 50100	
	Replace Windows	1460.14	210	83,800.00	0.00				
	Total for Dwelling Structures			88,800.00	2,805.00	2,805.00	2,805.00		
	Dwelling Equipment - Nonexpendable	1465.1							
	Total for Dwelling Equipment - Nonexp.				0.00	0.00	0.00	0.00	
	Nondwelling Structures	1470							
Total for Nondwelling Structures				0.00	0.00	0.00	0.00		
Nondwelling Equipment	1475								
Total for Nondwelling Equipment				0.00	0.00	0.00	0.00		

Signature of Executive Director & Date:

Director, June 30, 2003

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

X

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

PHA Name:		Grant Type and Number OH12PO3150101 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
	Site Improvement	1450						
OH31-9 Heritage Knolls	Concrete Pads by Units	1450.14	7	5,000.00	5,150.00	5,150.00	5,150.00	
	Concrete Work - Sidewalks	1450.14	As Needed	10,000.00	7,012.87	7,012.87	7,012.87	
	Total for Site Improvement			15,000.00	12,162.87	12,162.87	12,162.87	
	Dwelling Structures	1460						
	Convert Garage to Training Space	1460.21	75 SF	6,000.00	6,000.00	6,000.00	4,016.41	
	Replace Downspouts & Gutters	1460.14	As Needed	10,000.00	15,225.00	15,225.00	15,225.00	
	Total for Dwelling Structures			16,000.00	21,225.00	21,225.00	19,241.41	
	Dwelling Equipment - Nonexpendable	1465.1						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	Nondwelling Equipment	1475						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Director, June 30, 2003

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

X

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

form HUD-52837 (10/96)

(2) To be completed for the Performance and Evaluation Report.

ref Handbook 7485.3

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

Part II. Supporting Pages

PHA Name: Grant Type and Number OH12PO3150101 Federal FY of Grant: 2001
Replacement Housing Factor Grant No. 2001

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
OH31-11 Washington Group Home	Site Improvement	1450						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	Dwelling Structures	1460						
	Total for Dwelling Structures			0.00	0.00	0.00	0.00	
	Dwelling Equipment - Nonexpendable	1465.1						
	Replace Heating and A/C unit	1465.13	1	4,250.00	2,398.00	2,398.00	2,398.00	
	Total for Dwelling Equipment - Nonexp.			4,250.00	2,398.00	2,398.00	2,398.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	Nondwelling Equipment	1475						
Total for Nondwelling Equipment			0.00	0.00	0.00	0.00		

Signature of Executive Director & Date:

Director, June 30, 2003

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

X

Annual Statement/Performance and Evaluation Report

Part III: Supporting Pages

PHA Name:

Grant Type and Number OH12PO3150101
 replacement housing factor Grant no. 2001

Federal FY of Grant: 2001

Development Number/Name HA-Wide	General Description of Major Work Categories	Development Account	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
Activities		Number						
OH31-03 Ravenna Woods	Site Improvement	1450						
	Underground Water Conductors				2,227.00	2,227.00	990.00	Moved up from 501-02
	Total for Site Improvement			0.00	2,227.00	2,227.00	990.00	to obligate savings
	Dwelling Structures	1460						
	Foundation Work				45,213.00	45,213.00	16,097.40	Moved up from 501-02
	Total for Dwelling Structures			0.00	45,213.00	45,213.00	16,097.40	to obligate savings
	Dwelling Equipment - Nonexpendable	1465.1						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
Nondwelling Equipment	1475							
Total for Nondwelling Equipment			0.00	0.00	0.00	0.00		

Director, June 30, 2003

Signature of Public Housing Director/Office of Native American programs Administrator & Date:

REVISED IMPLEMENTATION SCHEDULE

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRF) Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
OH31-01 Athena Gardens	03/30/02			06/30/03			
OH31-01 Community Estates	03/30/02			06/30/03			
OH31-02 S Willow	06/30/02			09/30/03			
Franklin Ave.	06/30/02			09/30/03			
W. Elm St.	06/30/02			09/30/03			
OH31-04 Eastowne Manor	06/30/02			09/30/03			
OH31-05 Town Square Villas	06/30/02			09/30/03			
OH31-09 Heritage Knolls	09/30/02			06/30/03			
OH31-11 Washington Group Home	06/30/02			09/30/03			
HA-Wide Physical Improvements							
HA-Wide Mgmt. Impr.	12/30/03	12/31/02		09/30/03			
Administration	12/30/03	12/31/02		09/30/03			
Fees & Costs	12/30/03	12/31/02		09/30/03			
Contingency	12/30/03	12/31/02		09/30/03			

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

X

X

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

HA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO50102 Capital Fund Program Grant No: 2002 Replacement Housing Factor Grant No. 2002 Federal FY of Grant: <div style="text-align: right;">2002</div>
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Original Annual Statement
 Reserve for Disasters/Emergencies
 Revised Annual statement/Revision Number _____
 Performance and Evaluation report for Program Year Ending Jun-03
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds	0.00	0.00	0.00	0.00
2	1406 Operations	0.00	56,840.00	56,840.00	0.00
3	1408 Management Improvements	72,600.00	67,400.00	67,400.00	32,971.44
4	1410 Administration	51,200.00	56,840.00	56,840.00	42,296.25
5	1411 Audit	1,500.00	1,500.00	0.00	0.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	15,000.00	4,896.00	4,896.00	0.00
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	42,000.00	97,001.00	97,001.00	97,001.00
10	1460 Dwelling Structures	299,946.00	228,727.00	148,055.00	148,055.00
11	1465.1 Dwelling Equipment - Nonexpendable	0.00	0.00	0.00	0.00
12	1470 Nondwelling Structures	0.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	5,500.00	20,000.00	20,000.00	0.00
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	0.00	35,200.00	2,127.82	2,127.82
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1501 Collateralization or Debt Service	0.00	0.00	0.00	0.00
20	1502 Contingency	24,261.00	0.00	0.00	0.00
21	Amount of Annual Grant (Sum of Lines 2-20)	512,007.00	568,404.00	453,159.82	322,451.51
22	Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23	Amount of line 21 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
24	Amount of line 21 Related to Security - Soft Costs	6,400.00	0.00	0.00	0.00
25	Amount of line 21 Related to Security - Hard Costs	0.00	0.00	0.00	0.00
26	Amount of line 21 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

Signature of Executive Director & Date: _____ Signature of Public Housing Director/Office of Native American Programs Administrator & Date _____

Director, June 30, 2003

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO50102 Capital Fnd Program Grant No: 2002 Replacement Housing Factor Grant No: 2002			Federal FY of Grant: 2002			Status of Proposed Work
Development Number/Name HA-Wide Activities HA-Wide	General Description of Major Work Categories	Dev. Acct. No. Number	Quantity	Total Estimated Cost		Total Actual Cost		
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA-Wide	Operations	1406		0.00	56,840.00	56,840.00	0.00	
HA-Wide	Management Improvements	1408						
	Resident Security			6,400.00	6,400.00	6,400.00	321.00	
	Develop Job Training & Business Develop Programs			28,700.00	23,500.00	23,500.00		
	Coordinator of Social Services for Drug Elimination			37,500.00	37,500.00	37,500.00	32,650.44	
	Total for Management Improvements			72,600.00	67,400.00	67,400.00	32,971.44	
HA-Wide	Administration	1410						
	a. Salaries	1410.1		36,050.00	43,225.00	43,225.00	32,253.73	
	b. Fringe Benefits	1410.9		14,050.00	13,145.00	13,145.00	9,735.48	
	c. Advertising	1410.19		1,100.00	470.00	470.00	307.04	
	Total for Administration			51,200.00	56,840.00	56,840.00	42,296.25	
HA-Wide	Fees & Costs	1430						
	a. Architect			15,000.00	4,896.00	4,896.00		
	Total for Fees & Costs			15,000.00	4,896.00	4,896.00	0.00	
HA-Wide	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Equipment	1475						
	a. writer/office Equipment			5,500.00	20,000.00	20,000.00		Moved to 706 Moved to 706
	Total for Nondwelling Equipment			5,500.00	20,000.00	20,000.00	0.00	
HA-Wide	Relocation Cost	1495.1		0.00	0.00	0.00	0.00	
HA-Wide	Contingency	1502		24,261.00	0.00	0.00	0.00	

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO50102 Capital Fnd Program Grant No: 2002 Replacement Housing Factor Grant No: 2002			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 Proposed Work (2)
				Original	Revised	Funds Obligated	Funds Expended	
OH31-05 Town Square Villas	Drainage Fences Replace Trees Landscaping Concrete Work Replace Patio Fences	1450	400 LF	10,000.00 6,000.00 2,000.00 4,000.00 20,000.00	14,890.00 0.00 0.00 0.00 25,000.00 40,000.00	14,890.00 25,000.00 40,000.00	14,890.00 25,000.00 40,000.00	
OH31-02 State Route 183	Foundations and Waterproofing				0.00			
OH31-03 Ravenna Woods	Drainage				0.00			
OH31-01 Athena Gardens	Concrete Work				17,111.00	17,111.00	17,111.00	
	Total for Site Improvement			42,000.00	97,001.00	97,001.00	97,001.00	
OH31-01 Athena Gardens	Replace Siding, Gutters, Downspouts and Shutters	1460	All	104,650.00	64,555.00	64,555.00	64,555.00	
OH31-01 Community Estates	Repl Siding, shutters, Gutters, Downspouts Doors	1460	all	151,400.00 43,896.00	75,500.00	75,500.00	75,500.00	
OH31-03 Ravenna Woods	Foundation and Drainage Work	1460	as needed		0.00			501-01 to obligate savings
OH31-05 Town Square Villas	Replace Downspouts & gutters				8,000.00	8,000.00	8,000.00	
OH31-09 Heritage Knolls	Replace Windows				80,672.00			
	Total for Dwelling Structures			299,946.00	228,727.00	148,055.00	148,055.00	
				0.00				
				0.00	0.00	0.00	0.00	
				0.00	0.00	0.00	0.00	

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHG) Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
OH31-01 Athena Gardens	03/31/03			06/30/04			
OH31-01 Community Estates	03/31/03			06/30/04			
OH31-05 Town Square	09/30/03			06/30/04			
HA-Wide Physical Improvements							
HA-Wide Mgmt. Impr.	09/30/04			12/31/05			
Administration	09/30/04			12/31/05			
Fees & Costs	09/30/04			12/31/05			
Contingency	09/30/04			12/31/05			

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

X

X