

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

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# PHA Plans

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

Beaufort Housing Authority  
1009 Prince Street  
P.O.Box 1104  
Beaufort, South Carolina 29901

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

**PHA Plan  
Agency Identification**

**PHA Name:** Beaufort Housing Authority

**PHA Number:** SC026

**PHA Fiscal Year Beginning:** 10/2004

**Public Access to Information**

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

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

**Display Locations For PHA Plans and Supporting Documents**

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

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

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

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

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

**A. Mission**

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

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- The PHA's mission is: The mission of the Beaufort Housing Authority is to provide affordable housing in a safe community environment and to assist those we serve as they strive to achieve self-sufficiency.

**B. Goals**

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

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

- PHA Goal: Expand the supply of assisted housing  
Objectives:
- Apply for additional rental vouchers:
  - Reduce public housing vacancies:
  - Leverage private or other public funds to create additional housing opportunities:
  - Acquire or build units or developments
  - Other (list below)
- PHA Goal: Improve the quality of assisted housing  
Objectives:
- Improve public housing management: (PHAS score) Maintain High Performer Designation
  - Improve voucher management: (SEMAP score) Maintain High Performer Designation
  - 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)  
Complete HVAC installation in public housing by 09/30/2004  
Improve curb appeal
- 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: Maintain decent, safe, affordable housing making residents proud of their homes.

**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)
- Have effective resident organizations in each community by 12/31/2005

**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)

Maintain affirmative measures to ensure all applicants/residents are treated equally regardless of race,religion,national origin,sex,or disability.

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

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

**i. Annual Plan Type:**

Select which type of Annual Plan the PHA will submit.

**Standard Plan**

**Streamlined Plan:**

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

**Troubled Agency Plan**

**ii. Executive Summary of the Annual PHA Plan**

[24 CFR Part 903.7 9 (r)]

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

The Beaufort Housing Authority has prepared this agency Plan in compliance with Section 511 of the Quality Housing and Work Responsibility Act of 1998 and the ensuing HUD requirements

We have adopted the following mission statement to guide the activities of the Beaufort Housing Authority:

**The mission of the Beaufort Housing Authority is to provide affordable housing in a safe community environment and to assist those we serve as they strive to achieve self-sufficiency.**

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

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

- We will retain the calculation of rent payments at the greater of 30% of adjusted monthly income, 10% of monthly income or shelter rent.
- Maintain Section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction.
- We have retained our local preference for working families and those who are pursuing or have recently graduated from an educational program.
- We have implemented a homeownership program, a lease purchase program for Section 8 FSS participants using HOME funds.
- We will administer a Tenant Based Rental Assistance (TBRA) Program using HOME funds.
- We will provide down payment and closing cost assistance using HOME funds.
- We hope to develop affordable housing using the Tax Credit Program or another form of financing.
- We will evaluate the feasibility of pledging a portion of future year capital funds as security for private borrowing to accelerate our capital and management improvement program. If determined feasible we will proceed.

**iii. Annual Plan Table of Contents**

[24 CFR Part 903.7 9 (r)]

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

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**Attachments**

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

Required Attachments:

- A** FY 2004 Capital Funds Bond Program) (**sc026a01**)
- B** Justification For Admin./Maint.Facility (**sc026b01**)
- C** Leveraging of Capital Funds (**sc026c01**)
- D** FY 2004 Capital Fund Plan SC026-501-04 (**sc026d01**)
- E** FY 2004 Capital Fund 5 Year Plan (**sc026d01**)
- F** Performance & Evaluation SC26-501-01 (**sc026f01**)
- **G** Performance & Evaluation SC26-501-02 (**sc026g01**)
- **H** Performance & Evaluation SC26-501-03 (**sc026h01**)
- **I** Performance & Evaluation SC26-502-03 (**sc026i01**)
- **J** Comments Resident Advisory Board (**sc026j01**)
- **K** Membership Resident Advisory Board (**sc026k01**)
- **L** Sect.8 Homeownership Capacity Statement (**sc026l01**)
- **M** Progress Regarding Five Year Goals (**sc026m01**)
- **N** Substantial Deviation Definition (**sc026n01**)
- **O** Pet Ownership (**sc026o01**)
- **P** Deconcentration Plan (**sc026p01**)
- 

**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.

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

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	eradication of pest infestation (including cockroach infestation)	
X	Public housing grievance procedures <input 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 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
NA	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
NA	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
X	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
NA	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
NA	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
NA	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
X	Policies governing any Section 8 Homeownership program <input checked="" 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
NA	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
X	The most recent Public Housing Drug Elimination Program (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
NA	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional)	(specify as needed)

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	(list individually; use as many lines as necessary)	

## 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	1,654	5	5	3	1	2	2
Income >30% but <=50% of AMI	1,055	5	5	2	1	2	3
Income >50% but <80% of AMI	848	5	3	1	1	2	1
Elderly	157	5	4	2	1	2	3
Families with Disabilities	1,381	5	4	2	3	3	3
White	4,574	5	4	2	1	2	3
Black	1,552	5	4	2	1	2	1
Hispanic	1,223	5	4	2	1	2	1
Race/Ethnicity							

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

- Consolidated Plan of the Jurisdiction/s  
Indicate year: 2004
- U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") dataset
- American Housing Survey data

- Indicate year:
- Other housing market study
- Indicate year:
- Other sources: (list and indicate year of information)

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

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

<b>Housing Needs of Families on the Waiting List</b>			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	173		90
Extremely low income <=30% AMI	135	79%	
Very low income (>30% but <=50% AMI)	32	18%	
Low income (>50% but <80% AMI)	6	3%	
Families with children	105	61%	
Elderly families	7	4%	
Families with Disabilities	21	12%	
Race/ White	24	14%	

<b>Housing Needs of Families on the Waiting List</b>			
Race/ Black	147	86%	
Race/ Hispanic	2	.1%	
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	62	36%	18
2 BR	86	50%	21
3 BR	22	13%	45
4 BR	3	1%	6
5 BR	0	0	0
5+ BR	0	0	0
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			

<b>Housing Needs of Families on the Waiting List</b>			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	73		167
Extremely low income <=30% AMI	68	93%	
Very low income (>30% but <=50% AMI)	5	7%	
Low income	0	0%	

<b>Housing Needs of Families on the Waiting List</b>			
(>50% but <80% AMI)			
Families with children	58	79%	
Elderly families	0	0%	
Families with Disabilities	6	8%	
Race/ White	14	19%	
Race/ Black	59	81%	
Race/ Hispanic	1	.1%	
Race/ethnicity			
Characteristics by Bedroom Size <b>(Public Housing Only)</b>			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)? (12)			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes (Displaced by Fire or Natural Disaster)			

### **C. Strategy for Addressing Needs**

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

#### **(1) Strategies**

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

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

Select all that apply

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

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select all that apply

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

**Need: Specific Family Types: The Elderly**

**Strategy 1: Target available assistance to the elderly:**

Select all that apply

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

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

**Strategy 1: Target available assistance to Families with Disabilities:**

Select all that apply

- Seek designation of public housing for families with disabilities
- Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing
- Apply for special-purpose vouchers targeted to families with disabilities, should they become available
- Affirmatively market to local non-profit agencies that assist families with disabilities
- Other: (list below)  
Work with local advocacy groups to determine additional housing needs for persons with disabilities. Continue relationship with landlord who has a significant no. of handicapped accessible units.

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

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

Select if applicable

- Affirmatively market to races/ethnicities shown to have disproportionate housing needs

Other: (list below)

**Strategy 2: Conduct activities to affirmatively further fair housing**

Select all that apply

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

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

**(2) Reasons for Selecting Strategies**

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

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

**2. Statement of Financial Resources**

[24 CFR Part 903.7 9 (b)]

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

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2004 grants)</b>		
a) Public Housing Operating Fund	64,170	
b) Public Housing Capital Fund	358,925	
c) P.H.Capital Fund Bond Proceeds	565,000	
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	2,600,099	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants		
h) Community Development Block Grant		
i) HOME (Program Income)	40,000	
Other Federal Grants (list below)		
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
Capital Fund	416,360	
HOME-TBRA Grant	66,000	
<b>3. Public Housing Dwelling Rental Income</b>	780,000	
<b>4. Other income (list below)</b>		
Maintenance Charges	25,000	
Laundry Commission	2,500	
<b>4. Non-federal sources (list below)</b>		
Late Fees	15,000	
P.H.Interest Income	4,800	
<b>Total resources</b>	4,937,854	

### **3. PHA Policies Governing Eligibility, Selection, and Admissions**

[24 CFR Part 903.7 9 (c)]

#### **A. Public Housing**

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

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

- a. When does the PHA verify eligibility for admission to public housing? (select all that apply)
- When families are within a certain number of being offered a unit: (state number)
  - When families are within a certain time of being offered a unit: (state time)
  - Other: Within 45 days of receiving the application.
- b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?
- Criminal or Drug-related activity
  - Rental history
  - Housekeeping
  - Other Credit history
- c.  Yes  No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- d.  Yes  No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- e.  Yes  No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

##### **(2)Waiting List Organization**

- a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)
- Community-wide list
  - Sub-jurisdictional lists
  - Site-based waiting lists
  - Other (describe)
- b. Where may interested persons apply for admission to public housing?
- PHA main administrative office
  - PHA development site management office

Other (list below)

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

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

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

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

4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?

- PHA main administrative office
- All PHA development management offices
- Management offices at developments with site-based waiting lists
- At the development to which they would like to apply
- Other (list below)

### **(3) Assignment**

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

- One
- Two—Exceptions may be made in extenuating circumstances which would cause a hardship for the applicant
- Three or More

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

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

### **(4) Admissions Preferences**

a. Income targeting:

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

b. Transfer policies:

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

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

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

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

3. If the PHA will employ admissions preferences, please prioritize by placing a “1” in the space that represents your first priority, a “2” in the box representing your second

priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use “1” more than once, “2” more than once, etc.

## 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
- 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) Anytime income source change

**(6) Deconcentration and Income Mixing**

- a.  Yes  No: Does the PHA have any general occupancy (family) public housing developments covered by the deconcentration rule? If no, this section is complete. If yes, continue to the next question.
- b.  Yes  No: Do any of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments? If no, this section is complete.

If yes, list these developments as follows:

<b>Deconcentration Policy for Covered Developments</b>			
<b>Development Name:</b>	<b>Number of Units</b>	<b>Explanation (if any) [see step 4 at §903.2(c)(1)(iv)]</b>	<b>Deconcentration policy (if no explanation) [see step 5 at §903.2(c)(1)(v)]</b>
Scattered Homes	30	Average income is less than 30% of the area median income	
Single Duplex	2	Size & configuration promote deconcentration	

**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)  
     Past history if previous Section 8 participant

- b.  Yes  No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- c.  Yes  No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- d.  Yes  No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)
- e. Indicate what kinds of information you share with prospective landlords? (select all that apply)
- Criminal or drug-related activity
- Other (describe below)  
Rental history if known and requested

**(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 : Section 8 Office

**(3) Search Time**

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

If yes, state circumstances below:

Extenuating circumstances such as illness or hospitalization-Extremely large families seeking scarce units-Persons seeking handicapped accessible units

**(4) Admissions Preferences**

- a. Income targeting

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

b. Preferences

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

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

Former Federal preferences

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

Other preferences (select all that apply)

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

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

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  
Homelessness  
High rent burden

Other preferences (select all that apply)

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

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

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

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

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

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

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

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

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

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

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

- Through published notices as necessary  
 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:

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

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

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

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

For the earned income of a previously unemployed household member

For increases in earned income

Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

Fixed percentage (other than general rent-setting policy)

If yes, state percentage/s and circumstances below:

For household heads

For other family members

For transportation expenses

For the non-reimbursed medical expenses of non-disabled or non-elderly families

Other (describe below)

e. Ceiling rents

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

Yes for all developments

Yes but only for some developments

No

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

For all developments

For all general occupancy developments (not elderly or disabled or elderly only)

- For specified general occupancy developments
- For certain parts of developments; e.g., the high-rise portion
- For certain size units; e.g., larger bedroom sizes
- Other (list below)

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

- Market comparability study
- Fair market rents (FMR)
- 95<sup>th</sup> percentile rents
- 75 percent of operating costs
- 100 percent of operating costs for general occupancy (family) developments
- Operating costs plus debt service
- The "rental value" of the unit plus a utility allowance
- 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 :All increases are reported however the threshold for upward adjustment is \$1200 annually or \$30 in total tenant payment

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

## **(2) Flat Rents**

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

- The section 8 rent reasonableness study of comparable housing
- Survey of rents listed in local newspaper

- Survey of similar unassisted units in the neighborhood
- Other (list/describe below)

## B. Section 8 Tenant-Based Assistance

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

### (1) Payment Standards

Describe the voucher payment standards and policies.

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

- At or above 90% but 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 provided adequate funds are available.
- Other (list below)  
Reductions in HUD's annual contributions. The goal is to assist the number of families equal to our baseline allocation of 554 vouchers.

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)  
Available funding

**(2) Minimum Rent**

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

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

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

**5. Operations and Management**

[24 CFR Part 903.7 9 (e)]

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

**A. PHA Management Structure**

Describe the PHA’s management structure and organization.

(select one)

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

**B. HUD Programs Under PHA Management**

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

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing		
Section 8 Vouchers		
Section 8 Certificates		

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

**C. 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.

**A. Public Housing**

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

If yes, list additions to federal requirements below:

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

PHA main administrative office

- PHA development management offices  
 Other (list below)

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

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

If yes, list additions to federal requirements below:

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

- PHA main administrative office  
 Other (list below)  
Section 8 Office-1205 B Duke St., Beaufort, S.C.

## **7. Capital Improvement Needs**

[24 CFR Part 903.7 9 (g)]

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

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

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

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

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

Select one:

- The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name) **Attachment B-sc026b01**

-or-

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

**X**

**We will evaluate the feasibility of pledging a portion of future year Capital Fund appropriations as security for private borrowing to accelerate our capital and management improvement program.**

**(2) Optional 5-Year Action Plan**

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

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

b. If yes to question a, select one:

The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state name)**Attachment E-sc026e01**

-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:

The agency hopes to acquire units by leveraging Section 8 administrative reserves to make the purchase. The units will be low income but not public housing.

## **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.)

<b>Demolition/Disposition Activity Description</b>
1a. Development name: Scattered Units.
1b. Development (project) number: SC026001
2. Activity type: Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one)

Approved <input type="checkbox"/> Submitted, pending approval <input checked="" type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: Submitted –09/2003
5. Number of units affected: (0)
6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development-(2)vacant lots SCO26001-No dwelling units included <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity:October 2004 b. Projected end date of activity:September 2005

**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.

<b>Designation of Public Housing Activity Description</b>
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.

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

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

<b>Public Housing Homeownership Activity Description (Complete one for each development affected)</b>
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:

Family must have been assisted by Section 8 or lived in public housing for the previous 9 months .During this period,all program requirments must have been complied with.

**12. PHA Community Service and Self-sufficiency Programs**

[24 CFR Part 903.7 9 (l)]

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

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

1. Cooperative agreements:

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

If yes, what was the date that agreement was signed? 02/01/2001

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. )

<b>Services and Programs</b>				
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)
Family Self-Sufficiency Program	50	Waiting list	Community Centers / Main Office	Section 8
Family Self- Sufficiency Training Seminars	75+	Walk-in / Open	Community Centers / Main Office	Both
Homeownership Education	80+	Open registration	Community Centers / Main Office	Both
Community Service Meetings – local organizations provide information of services at community meetings	75+	Walk –in / Open	Community Centers	Public Housing
Individual Credit Counseling Predatory Lending	100+	Walk-in /Open	Community Centers / Main Office	Both
Individual Budget Counseling	100+	Walk-in / Open	Community Centers / Main Office	Both
Individual Education Counseling	25+	Walk-in / Open	Community Centers / Main Office	Both
Referral Services	150+	Walk-in / Open	Community Centers / Main Office	Both
Faith Initiatives	200+	Open	Community Centers	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: 05/01/04)
Public Housing	0	0
Section 8	16	48

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? (list below)

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

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

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

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

**All Developments**

**C. Coordination between PHA and the police**

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

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

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

**D. Additional information as required by PHDEP/PHDEP Plan**

PHAs eligible for FY 2003 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

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

**14. RESERVED FOR PET POLICY**

[24 CFR Part 903.7 9 (n)]

**15. Civil Rights Certifications**

[24 CFR Part 903.7 9 (o)]

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

**16. Fiscal Audit**

[24 CFR Part 903.7 9 (p)]

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

## **17. PHA Asset Management**

[24 CFR Part 903.7 9 (q)]

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

1.  Yes  No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock, including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have **not** been addressed elsewhere in this PHA Plan?
2. What types of asset management activities will the PHA undertake? (select all that apply)
  - Not applicable
  - Private management
  - Development-based accounting
  - Comprehensive stock assessment
  - Other: (list below): Capital Fund Program-See Attachments
3.  Yes  No: Has the PHA included descriptions of asset management activities in the **optional** Public Housing Asset Management Table?

## **18. Other Information**

[24 CFR Part 903.7 9 (r)]

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

1.  Yes  No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)

- Attached at Attachment (File name):sc026f01  
 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: Commissioner was elected by the Resident Advisory Board. This Board is comprised of the Presidents of the individual Resident Organizations.

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)

**The Resident Commissioner was not re-appointed by the City due to her having served two consecutive terms (local ordinance). The Resident Advisory Board is currently searching for a replacement.**

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

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

1. Consolidated Plan jurisdiction: **State of South Carolina Consolidated Plan for Housing and Community Development**
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. Provide affordable home ownership opportunities –down payment & closing cost assistance using HOME program income.
2. Increase low income rental housing units
3. Seek additional Section 8 funding when available
4. Provide training & counseling regarding predatory lending practices.
5. Provide economic development opportunities by administering a Family Self-Sufficiency Program.
6. Utilize ceiling rents to provide an incentive for economic development & self sufficiency.

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

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

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

## Attachments

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

Attachment A – sc026a04	FY 2004 Capital Fund Plan SC26-501-04
Attachment B – sc026b04	Justification For Admin./Maint.Facility
Attachment C – sc026c04	Leveraging of Capital Funds--Bonds
Attachment D – sc026d04	FY 2004 Capital Fund Bond Program
Attachment E – sc026e04	FY 2004 Capital Fund 5 Year Plan
Attachment F- sc026f04	Performance & Evaluation SC26-501-01
Attachment G– sc026g04	Performance & Evaluation SC26-501-02
Attachment H – sc026h04	Performance & Evaluation SC26-501-03
Attachment I- sc026i04	Performance & Evaluation SC26-502-03
Attachment J –sc026j04	Comments Resident Advisory Board
Attachment K– sc026k04	Membership Resident Advisory Board
Attachment L –sc026l04	Sect.8 Homeownership Capacity Statement
Attachment M – sc026m04	Progress Regarding Five Year Goals
Attachment N- sc026n04	Substantial Deviation Definition
Attachment O- sc026o04	Pet Ownership
Attachment P - sc026p04	Deconcentration Plan

## **PHA Plan Table Library**

### **Component 7 Capital Fund Program Annual Statement**

**Parts I, II, and II**

**Annual Statement**

**Capital Fund Program (CFP) Part I: Summary**

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

Original Annual Statement

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

**Annual Statement**

**Capital Fund Program (CFP) Part II: Supporting Table**

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

**Annual Statement**

**Capital Fund Program (CFP) Part III: Implementation Schedule**

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

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

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

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





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

PHA Name:		Grant Type and Number			Federal FY of Grant:			
<b>Beaufort Housing Authority</b>		Capital Fund Program Grant No: <b>CFP 501-04</b> Replacement Housing Factor Grant: <b>Attachment A</b>			<b>2004</b>			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
<b>HA Wide</b>								
	Administration	1410.00		2,000.00				
	A/E Fees	1430.00		11,500.00				
	Cycle Painting	1460.00	25 Units	15,000.00				
	Maint. Utility Vehicle	1475.00		5,300.00				
	Debt Service-Admin Build.	1501.00		45,000.00				
<b>SC26-2</b> <b>Oak Hill T.</b>	Replace Refrigerators	1465.10	38 units	15,200.00				
<b>SC26-4</b> <b>Sandalwood</b>	Replace Refrigerators	1465.10	80 Units	32,000.00				
<b>SC26-6</b>	New Mail Boxes w/Shelter	1450.00		7,500.00				
<b>Yemassee H</b>	Replace Floor Tile & Base	1460.00	50 units	104,989.00				
	New Water Saver Toilet	1460.00	50 units	10,000.00				
	New Vanities w/Sink	1460.00	50 units	30,000.00				
	Counter Tops & Cabinets Kitch.	1460.00	50 units	110,085.00				
<b>SC26-8</b>								
<b>SF Homes</b>	Replace Carpet w/ Floor Tile	1460.00	5 units	15,820.00				
	Replace Refrigerators	1475.00	12 Units	4,780.00				
	Install Window in Unit	1460.00	1 Unit	500.00				Emergency
	Replace Windows	1460.00	2 Units	6,000.00				Emergency
	TOTAL			415,674.00				



## **Attachment B**

### **Justification for new Administrative / Maintenance Facility**

The current administrative building began as a single project facility consisting of two offices, a community room and a maintenance shop. There have been three renovations since 1982, and there are now five offices, a small meeting area and a larger shop area. The community room has been absorbed except for the meeting area, which also contains a computer work station and work areas for two employees. The Section 8 office is in a converted two-bedroom unit. The building has three offices and a small bathroom which is used by the staff and general public. The waiting area is a hallway with two chairs.

We propose to construct a facility of approximately 4000 square feet and have all employees (other than remote offices) in one location. The facility will have the following major features:

- Reception area
- Office space for eleven employees
- Staff training room
- Board room
- Maintenance area

The current office will be modified to provide community facilities for residents and will continue to have a maintenance area for equipment and tools.

## Attachment C

### Leveraging of Capital Funds

The Beaufort Housing Authority is in need of additional office space. Following an investigation of alternatives, it was concluded the best approach would be to construct a new administrative and maintenance facility on land currently owned and available at Oak Hill Terrace Apartments however, the City of Beaufort would like for us to remain within their boundaries if possible. This is being investigated. To fund the new facility, the Authority has elected to join a pool of other South Carolina housing authorities to issue bonds. Subject to HUD approval, the bonds will be secured and paid from future funds received by the Authority under HUD's Capital Fund Program. Only 12% of the annual funds will be pledged leaving 88% for other capital and management improvements. The estimated amount of the annual interest and principal payment over the next 20 years is expected to be approximately \$45,000.

The amount of funds expected to be received and the costs of financing are as follows:

#### SOURCE OF FUNDS:

Gross Borrowing	\$565,000
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#### USE OF FUNDS

New Admin. / Maint. Build	\$476,000
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Cost of Financing	\$16,000
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Debt Service Reserve Req.	45,000
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Capitalized Interest	<u>28,000</u>
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Total	\$565,000
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Construction of the facility is expected to be completed within 2 years after receiving the funds.

Budget line item 1501 will show the budgeted use of capital funds for the payment of debt service.

As stated above, we propose to utilize 12% our annual capital funds for this endeavor. We have already installed heating and air conditioning in our units, and there are currently no problems which cannot be addressed with the remaining capital fund appropriations of about \$314,000 annually. Refer to the five year plan.

We included work items in this plan exceeding \$314,000 to have the opportunity to utilize fungibility.

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

PHA Name: <b>Beaufort Housing Authority</b>	Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No:	<b>Bond Funds Attachment D</b>	Federal FY of Grant: <b>2004</b>
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Original Annual Statement     
  Reserve for Disasters/Emergencies     
  Revised Annual Statement (revision no. )  
 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-CGP Funds				
2	1406 Operations	-	-	-	-
3	1408 Management Improvements	-	-	-	-
4	1410 Administration	1,000.00	-	-	-
	1411 Debt Service Bonds				
5	1415 Liquidated Damages	-	-	-	-
6	1420 Debt Service Bonds	-	-	-	-
7	1430 Fees and Costs	117,000.00	-	-	-
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	-	-	-	-
10	1460 Dwelling Structures	-	-	-	-
11	1465.1 Dwelling Equipment - Nonexpendable	-	-	-	-
12	1470 Nondwelling Structures	447,000.00	-	-	-
13	1475 Nondwelling Equipment	-	-	-	-
14	1485 Demolition	-	-	-	-
15	1490 Replacement Reserve	-	-	-	-
16	1492 Moving to Work Demonstration	-	-	-	-
17	1495.1 Relocation Costs	-	-	-	-
18	1499 Development Activities	-	-	-	-
19	1501 Collateralization or Debt Service	-	-	-	-
20	1502 Contingency	-	-	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	\$ 565,000.00	\$ -	\$ -	\$ -
22	Amount of line 21 Related to LBP Activities	-	-	-	-
23	Amount of line 21 Related to Section 504 Compliance	-	-	-	-
24	Amount of line 21 Related to Security - Soft Costs	-	-	-	-
25	Amount of line 21 Related to Security - Hard Costs	-	-	-	-
26	Amount of line 21 Related to Energy Conversation Measures	-	-	-	-













**Capital Fund Program Five-Year Action Plan  
Part 1: Summary Attachment C**

PHA Name <b>Beaufort Housing Authority</b>		<b>Attachment E</b>				<input type="checkbox"/> Original 5-Year <input checked="" type="checkbox"/> Revision No. <b>1</b>
Development Number/Name/HA- Wide	Year 1  2004	Work Statement for Year 2 FFY Grant: <b>2005</b> PHA FY: <b>10/1/2005</b>	Work Statement for Year 3 FFY Grant: <b>2006</b> PHA FY: <b>10/1/2006</b>	Work Statement for Year 4 FFY Grant: <b>2007</b> PHA FY: <b>10/1/2007</b>	Work Statement for Year 5 FFY Grant: <b>2008</b> PHA FY: <b>10/1/2008</b>	
	<b>Annual Statement</b>					
HA Wide		116,000.00	80,000.00	65,000.00	81,000.00	
SC26-1 Scattered Apts.		25,000.00	5,000.00		15,000.00	
SC26-2 Oak Hill Terrace		80,000.00	145,000.00	46,000.00		
SC26-4 Sandalwood Terrace		55,000.00	54,000.00	228,000.00	95,000.00	
SC26-6 Yemassee Heights		44,000.00	78,000.00	39,000.00	13,000.00	
SC26-7 Marsh Pointe		53,000.00		8,000.00	153,000.00	
SC26-8 Single Family Homes		15,000.00	75,000.00	41,000.00		
SC26-9 Duplex		30,000.00		6,600.00		
CFP Funds Listed for 5-year planning		418,000.00	437,000.00	433,600.00	357,000.00	
Replacement Housing Factor Funds						

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

PHA Name: <b>Beaufort Housing Authority</b>	Grant Type and Number Capital Fund Program Grant No: <b>SC26PO26501-01</b> Replacement Housing Factor Grant No: <b>Attachment F</b>	Federal FY of Grant: <b>2001</b>
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Original Annual Statement     
 Reserve for Disasters/Emergencies     
 Revised Annual Statement (revision no.    )

Performance and Evaluation Report for Program Year Ending     
 Final Performance and Evaluation Report     
**March 31, 2004**

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	-	16,961.00	16,961.00	15,730.00
3	1408 Management Improvements	7,000.00	7,764.00	7,764.00	7,764.00
4	1410 Administration	1,000.00	1,456.00	1,456.00	1,456.00
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	14,500.00	14,500.00	14,500.00	14,500.00
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	41,640.00	44,344.00	44,344.00	44,344.00
10	1460 Dwelling Structures	338,519.00	323,067.00	323,067.00	323,067.00
11	1465.1 Dwelling Equipment - Nonexpendable	17,200.00	22,392.00	22,392.00	22,392.00
12	1470 Nondwelling Structures	-	-	-	-
13	1475 Nondwelling Equipment	40,311.00	29,686.00	29,686.00	29,686.00
14	1485 Demolition	-	-	-	-
15	1490 Replacement Reserve	-	-	-	-
16	1492 Moving to Work Demonstration	-	-	-	-
17	1495.1 Relocation Costs	-	-	-	-
18	1499 Development Activities	-	-	-	-
19	1501 Collateralization or Debt Service	-	-	-	-
20	1502 Contingency	-	-	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	\$ 460,170.00	\$ 460,170.00	\$ 460,170.00	\$ 458,939.00
22	Amount of line 21 Related to LBP Activities	-	-	-	-
23	Amount of line 21 Related to Section 504 Compliance	-	-	-	-
24	Amount of line 21 Related to Security - Soft Costs	-	-	-	-
25	Amount of line 21 Related to Security - Hard Costs	-	-	-	-
26	Amount of line 21 Related to Energy Conversation Measures	-	-	-	-

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

PHA Name:		Grant Type and Number				Federal FY of Grant:		
<b>Beaufort Housing Authority</b>		Capital Fund Program Grant No: <b>SC26PO26501-01</b> Replacement Housing Factor Grant   <b>Attachment F</b>				<b>2001</b>		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA Wide	Computer Software	1408.00		7,000.00	6,071.00	6,071.00	6,071.00	Complete
	Computer Equip.Non -Cap.	1408.00			456.00	456.00	456.00	Complete
	HVAC Equip.Non-Cap.	1408.00			1,237.00	1,237.00	1,237.00	Complete
	Transfer to Operations	1406.00			16,961.00	16,961.00	15,730.00	In Progress
	Maint.Equip.For HVAC Sys.	1475.00		2,500.00	590.00	590.00	590.00	Complete
	Computer Equip.Upgrade	1475.00		2,811.00	2,811.00	2,811.00	2,811.00	Complete
	Administration	1410.00		1,000.00	1,456.00	1,456.00	1,456.00	Complete
	A/E Fees	1430.00		14,500.00	14,500.00	14,500.00	14,500.00	Complete
	Cycle Paint Units	1460.00	35 Units	30,000.00	32,660.00	32,660.00	32,660.00	Complete
	Maintenance Pickup	1475.00		13,500.00	12,515.00	12,515.00	12,515.00	Complete
	Maintenance Van	1475.00		14,500.00	13,770.00	13,770.00	13,770.00	Complete
	Repair Concrete Drives/Walks	1450.00		-	1,800.00	1,800.00	1,800.00	Complete
SC 26-1	Exterior Painting	1460.00		18,865.00	21,235.00	21,235.00	21,235.00	Complete
Scattered	Replace Ranges	1465.10		16,250.00	15,182.00	15,182.00	15,182.00	Complete
	Replace Lawn Mower	1475.00		7,000.00				Delay
SC26-2 Oak								
Hill Terrace	Playground Improvements	1450.00		24,140.00	24,134.00	24,134.00	24,134.00	Complete
	Pavillion/Bus Stop Shelter	1450.00		7,500.00	8,534.00	8,534.00	8,534.00	Complete
	Replace Ceiling Texture	1460.00		74,354.00	40,369.00	40,369.00	40,369.00	Complete
	Lavatory/Vanity-WS Toilet	1460.00		39,700.00	30,030.00	30,030.00	30,030.00	Complete
SC26-4								
Sandalwood	Replace Kitchen Cabinets-Wall	1460.00	80 Units	72,000.00	82,473.00	82,473.00	82,473.00	Complete
	Replace Range Hoods	1460.00	80 Units	10,000.00	13,770.00	13,770.00	13,770.00	Complete
	Asphalt & Walk Repairs	1450.00		10,000.00	9,876.00	9,876.00	9,876.00	Complete
	Install GFI Recpt.Kitchens	1460.00		-	4,450.00	4,450.00	4,450.00	Complete
SC26-6								
Yemassee H								
	Install HD Screen Doors	1460.00	50 Units	20,500.00	20,500.00	20,500.00	20,500.00	Complete
	Install Security Screens	1460.00	50 Units	19,160.00	19,160.00	19,160.00	19,160.00	Complete





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

PHA Name: <b>Beaufort Housing Authority</b>	Grant Type and Number Capital Fund Program Grant No: <b>SC16P026501-02</b> Replacement Housing Factor Grant No: <b>Attachment G</b>	Federal FY of Grant: <b>2002</b>
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Original Annual Statement     
 Reserve for Disasters/Emergencies     
 Revised Annual Statement (revision no. - )  
 Performance and Evaluation Report for Program Year Ending     
 Final Performance and Evaluation Report     
**March 31,2004**

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	20,000.00	10,000.00	-	-
3	1408 Management Improvements	-	-	-	-
4	1410 Administration	1,000.00	2,000.00	1,589.00	1,589.00
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	20,000.00	22,000.00	22,000.00	17,600.00
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	17,000.00	63,984.00	16,905.00	16,905.00
10	1460 Dwelling Structures	356,320.00	351,336.00	336,886.00	93,371.00
11	1465.1 Dwelling Equipment - Nonexpendable	-	-	-	-
12	1470 Nondwelling Structures	-	-	-	-
13	1475 Nondwelling Equipment	35,000.00	-	-	-
14	1485 Demolition	-	-	-	-
15	1490 Replacement Reserve	-	-	-	-
16	1492 Moving to Work Demonstration	-	-	-	-
17	1495.1 Relocation Costs	-	-	-	-
18	1499 Development Activities	-	-	-	-
19	1501 Collaterization or Debt Service	-	-	-	-
20	1502 Contingency	-	-	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	\$ 449,320.00	\$ 449,320.00	\$ 377,380.00	\$ 129,465.00
22	Amount of line 21 Related to LBP Activities	-	-	-	-
23	Amount of line 21 Related to Section 504 Compliance	-	-	-	-
24	Amount of line 21 Related to Security - Soft Costs	-	-	-	-
25	Amount of line 21 Related to Security - Hard Costs	-	-	-	-
26	Amount of line 21 Related to Energy Conversation Measures	-	-	-	-

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

PHA Name:		Grant Type and Number				Federal FY of Grant:		
<b>Beaufort Housing Authority</b>		Capital Fund Program Grant No: <b>SC16P026501-02</b> Replacement Housing Factor Grant   <b>Attachment G</b>				<b>2002</b>		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
<b>HA Wide</b>	<b>Transfer to Operating</b>	<b>1406.00</b>		<b>20,000.00</b>	<b>10,000.00</b>			
	<b>Administration</b>	<b>1410.00</b>		<b>1,000.00</b>	<b>2,000.00</b>	<b>1,589.00</b>	<b>1,589.00</b>	
	<b>A/E Fees</b>	<b>1430.00</b>		<b>20,000.00</b>	<b>22,000.00</b>	<b>22,000.00</b>	<b>17,600.00</b>	<b>Contract</b>
	<b>Prune Trees</b>	<b>1450.00</b>		<b>12,000.00</b>	<b>17,500.00</b>	<b>16,905.00</b>	<b>16,905.00</b>	
	<b>Cycle Paint Units</b>	<b>1460.00</b>	<b>15 Units</b>	<b>20,000.00</b>	<b>8,450.00</b>			<b>Contract</b>
	<b>Administrative Vehicle</b>	<b>1475.00</b>		<b>17,500.00</b>				<b>Delay</b>
	<b>Res.Serv.Van</b>	<b>1475.00</b>		<b>17,500.00</b>				<b>Delay</b>
<b>SC26-1</b>								
<b>Scattered</b>	<b>Carbon Monoxide Detectors</b>	<b>1460.00</b>	<b>63 Units</b>	<b>4,000.00</b>	<b>10,788.00</b>	<b>10,788.00</b>		<b>Contract</b>
<b>SC26-2 Oak</b>								
<b>Hill Terrace</b>	<b>Lift Station Repairs</b>	<b>1450.00</b>			<b>38,984.00</b>			<b>From 501-03</b>
	<b>New Mail Box W/Shelter</b>	<b>1450.00</b>			<b>7,500.00</b>			<b>5 Yr Plan</b>
	<b>Carbon Monoxide Detectors</b>	<b>1460.00</b>	<b>38 Units</b>	<b>3,000.00</b>	<b>5,137.00</b>	<b>5,137.00</b>		<b>Contract</b>
	<b>Floor Tile &amp; Base</b>	<b>1460.00</b>	<b>38 Units</b>		<b>75,204.00</b>	<b>75,204.00</b>	<b>75,204.00</b>	<b>Contract</b>
<b>Sandalwood</b>	<b>Replace Ceiling Texture</b>	<b>1460.00</b>	<b>80 Units</b>	<b>187,800.00</b>	<b>83,080.00</b>	<b>83,080.00</b>	<b>3,136.00</b>	<b>Contract</b>
	<b>Erosion Repairs</b>	<b>1450.00</b>		<b>5,000.00</b>				<b>Delay</b>
	<b>Replace Water Heaters</b>	<b>1460.00</b>	<b>16 Units</b>		<b>4,300.00</b>	<b>4,300.00</b>		<b>Emergency</b>
<b>SC26-6</b>								
<b>Yemassee</b>	<b>Carbon Monoxide Detectors</b>	<b>1460.00</b>	<b>50 Units</b>	<b>4,000.00</b>	<b>5,908.00</b>	<b>5,908.00</b>		<b>Contract</b>
	<b>Exterior Door Hardware</b>	<b>1460.00</b>	<b>50 Units</b>					<b>To 501-01</b>





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

PHA Name: <b>Beaufort Housing Authority</b>	Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No:	<b>CFP 501-03 Attachment H</b>	Federal FY of Grant: <b>2003</b>
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Original Annual Statement     
 Reserve for Disasters/Emergencies     
 Revised Annual Statement (revision no.    )

Performance and Evaluation Report for Program Year Ending    -     
 Final Performance and Evaluation Report    **March 31,2004**

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	10,000.00	10,000.00	-	-
3	1408 Management Improvements	-	3,950.00	-	-
4	1410 Administration	1,800.00	1,000.00	-	-
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	13,500.00	13,500.00	-	-
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	92,000.00	65,000.00	-	-
10	1460 Dwelling Structures	305,000.00	207,475.00	-	-
11	1465.1 Dwelling Equipment - Nonexpendable	19,300.00	12,000.00	-	-
12	1470 Nondwelling Structures	-	-	-	-
13	1475 Nondwelling Equipment	7,720.00	46,000.00	-	-
14	1485 Demolition	-	-	-	-
15	1490 Replacement Reserve	-	-	-	-
16	1492 Moving to Work Demonstration	-	-	-	-
17	1495.1 Relocation Costs	-	-	-	-
18	1499 Development Activities	-	-	-	-
19	1501 Collaterization or Debt Service	-	-	-	-
20	1502 Contingency	-	-	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	\$ 449,320.00	\$ 358,925.00	\$ -	\$ -
22	Amount of line 21 Related to LBP Activities	-	-	-	-
23	Amount of line 21 Related to Section 504 Compliance	-	-	-	-
24	Amount of line 21 Related to Security - Soft Costs	-	-	-	-
25	Amount of line 21 Related to Security - Hard Costs	-	-	-	-
26	Amount of line 21 Related to Energy Conversation Measures	-	-	-	-

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

PHA Name:		Grant Type and Number				Federal FY of Grant:		
<b>Beaufort Housing Authority</b>		Capital Fund Program Grant No: <b>CFP 501-03</b> Replacement Housing Factor Grant <b>Attachment H</b>				<b>2003</b>		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
<b>HA Wide</b>	Transfer to Operating	1406.00		10,000.00	10,000.00			
	Computer Software	1408.00			3,950.00			5 Yr Plan
	Administration	1410.00		1,800.00	1,000.00			
	A/E Fees	1430.00		13,500.00	13,500.00			
	Cycle Painting	1460.00	30 Units	30,000.00	29,975.00			
	Prune Trees	1450.00		15,000.00	15,000.00			
	Replace Mower	1475.00		7,720.00	8,000.00			
	Res.Serv.Van	1475.00			18,000.00			From 501-02
	Computer Hardware	1475.00			20,000.00			5 Yr Plan
<b>SC26-1</b>								
<b>Scattered</b>	Bath Vanity w/ Lavatory	1460.00	65 Units	30,000.00	30,000.00			
	Water Saver Toilets	1460.00	65 Units	22,000.00	25,000.00			
<b>SC26-2</b>								
<b>Oak Hill T.</b>	Upstairs Floor Repair	1460.00	14 Units	15,000.00				To 501-02
	New Floor Tile & Base	1460.00	39 Units	95,000.00				Delay
	Repairs to Lift Station	1450.00		27,000.00				To 501-02
<b>SC26-4</b>								
<b>Sandalwood</b>	Water Saver Toilets	1460.00	80 Units	46,000.00	58,500.00			
	Replace Damaged Int.Doors	1460.00	40 Units		15,000.00			5 Yr Plan
<b>SC26-6</b>								
<b>Yemassee H</b>	Replace Exterior Door Locks	1460.00	50 Units	10,000.00				To 501-01
	Resurface Parking Lot	1450.00		50,000.00	50,000.00			





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

PHA Name: <b>Beaufort Housing Authority</b>	Grant Type and Number Capital Fund Program Grant No: <b>SC16P026502-03</b> Replacement Housing Factor Grant No: <b>Attachment I</b>	Federal FY of Grant: <b>2003</b>
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Original Annual Statement     
 Reserve for Disasters/Emergencies     
 Revised Annual Statement (revision no.    )

Performance and Evaluation Report for Program Year Ending    -     
 Final Performance and Evaluation Report    **March 31,2004**

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	-	-	-	-
3	1408 Management Improvements	-	-	-	-
4	1410 Administration	-	-	-	-
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	-	-	-	-
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	-	-	-	-
10	1460 Dwelling Structures	71,531.00	-	71,531.00	-
11	1465.1 Dwelling Equipment - Nonexpendable	-	-	-	-
12	1470 Nondwelling Structures	-	-	-	-
13	1475 Nondwelling Equipment	-	-	-	-
14	1485 Demolition	-	-	-	-
15	1490 Replacement Reserve	-	-	-	-
16	1492 Moving to Work Demonstration	-	-	-	-
17	1495.1 Relocation Costs	-	-	-	-
18	1499 Development Activities	-	-	-	-
19	1501 Collateralization or Debt Service	-	-	-	-
20	1502 Contingency	-	-	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	\$ 71,531.00	\$ -	\$ 71,531.00	\$ -
22	Amount of line 21 Related to LBP Activities	-	-	-	-
23	Amount of line 21 Related to Section 504 Compliance	-	-	-	-
24	Amount of line 21 Related to Security - Soft Costs	-	-	-	-
25	Amount of line 21 Related to Security - Hard Costs	-	-	-	-
26	Amount of line 21 Related to Energy Conversation Measures	-	-	-	-





## **Resident Advisory Board Comments**

### **Meeting Held June 9, 2004**

1. Mr. Boyd reviewed major points of the plan including the pledging of future capital funds as security for borrowing to construct a new administrative facility
2. Financial resources were reviewed.
3. Mr. Boyd stated there were no policy changes.
4. The Five Year Capital Fund Plan was presented

#### Comments:

- 1.Pleased with progress on Five Year Goals
- 2.Expressed approval that all units had air conditioning
- 3.No changes or recommendations were made

## **Required Attachment K - Membership of the Resident Advisory Board or Boards**

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

Chairman Public Housing Marsh Pointe Representative	Ms. Annette Frazier 1730 Greenlawn Dr. # 114 Marsh Pointe Beaufort,SC 29902
Vice Chairman Section 8 Representative FSS	Ms.Georgeanne Smalls 7Quail Ridge Circlr N. Beaufort,SC 29902
Public Housing Sandalwood Terrace Representative	Ms. Dottie Robinson 8 Southwood Park Drive #116 Sandalwood Terrace Hilton Head, South Carolina 29926
Public Housing Yemassee Heights Representative	Ms. Gloria Frederick 21 Castle Hall Road #148 Yemassee Heights Yemassee, South Carolina 29945
Public Housing Oak Hill Terrace Representative	Ms.Shirley Parker-Brown 1650 Ribaut Rd. #138 Oak Hill Terrace Port Royal,SC 29936
Section 8 Representative FSS	Ms.Michelle Green 15 Hillstead Lane Port Royal,SC 29935

The BHA has Resident Councils in four developments which are not scattered sites. Presidents of these Councils are elected by the residents in the developments and become members of the Resident Advisory Board. Section 8 representatives are appointed by staff and are FSS participants.

## **Attachment L– Section 8 Homeownership Capacity Statement**

The Beaufort Housing Authority establishes a minimum homeowner downpayment requirement of at least 3 percent of the purchase price for participation in its Section 8 homeownership program, and requires that at least one percent of the purchase price come from the family's personal resources.

## **Attachment M–Progress Statement Regarding Five Year Goals**

Goal: Expand the supply of assisted housing

1. BHA has increased its regular voucher program by 70 since the goal was established and has added an additional 22 vouchers in the HOME TBRA Program.
2. BHA leveraged \$50,000 in County funds with a \$300,000 HOME grant to create new single family homes for a lease purchase program.
3. BHA is leveraging Section 8 Administrative reserves to acquire additional housing for low income families / individuals. Two homes have been acquired.

Goal: Improve the quality of assisted housing

1. BHA received high performer designation on the FY2000, FY 2001, FY 2002 and FY 2003 PHAS and SEMAP Programs.
2. HVAC has now been installed in all public housing units . We have improved curb appeal by increasing grounds keeping efforts and have implemented a “YARD OF THE MONTH” recognition program for residents.
3. We will evaluate the feasibility of pledging a portion of future year capital funds as security for private borrowing to accelerate our capital and management improvement program.

Goal: Increase assisted housing choices

1. BHA has implemented a Voucher Homeownership Program
2. Four homes have been constructed for a Lease / Purchase Program utilizing HOME and local funds. One has been sold and three are under lease with a purchase option.

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

1. BHA continues to administer on FSS Program consisting of approximately 48 participants. We were successful in securing two grants totaling \$8,000 from a local bank for homebuyer development.
2. BHA has effective Resident Organizations in all developments which are not scattered.
3. BHA has a local preference for those families who are working or in a self-

improvement program. The percentage of families whose primary income source is employment is 62% for public housing and 52% for Vouchers.

Goal: Ensure equal opportunity and affirmatively further fair housing objectives.

1. BHA continues to administer its housing programs ensuring that all applicants/residents are treated equally regardless of race, religion, natural origin, sex, or disability.

### **Attachment N– Substantial Deviation Definition**

Substantial deviations or significant amendments or modifications are defined as discretionary changes in the plans or policies of the housing authority that fundamentally change the mission, goals, objectives, or plans of the agency and which require formal approval of the Board of Commissioners.

## **Attachment O**

In accordance with 24CFR Part 960 the Beaufort Housing Authority adopted a Pet Ownership Policy on August 9,2000.A copy of this policy is on file at the Central Office and Development Offices.

## **Attachment P Deconcentration**

The Beaufort Housing Authority shall endeavor to maintain a cross – section of incomes in its public housing developments. Family incomes for all HA developments will be analyzed to determine the adjusted average income by bedroom size. This same analysis will be performed for each development. The average incomes of each development will be compared with the average income for all developments. The goal is to have developments with an average income between 85% and 115% of the average income for all developments.

The Housing Authority may offer incentives to eligible families to locate in certain developments where income mix does not meet the goal. Additionally, the Housing Authority may utilize the practice of skipping a family's name on the waiting list as needed to accomplish the necessary income mix when offering a specific unit in a public housing development. Such necessary skipping will be specifically documented in the resident's file.