

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

HOUSING AUTHORITY OF THE CITY OF TACOMA

5 Year Plan for Fiscal Years 2000 - 2004
Annual Plan for Fiscal Year 2004 - 2005

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

**PHA Plan
Agency Identification**

PHA Name: HOUSING AUTHORITY OF THE CITY OF TACOMA

PHA Number: WA005

PHA Fiscal Year Beginning: (mm/yyyy) JULY 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) **RESIDENT ADVISORY BOARD**

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

- Main business office of the PHA
- PHA development management offices
- Other

5-YEAR PLAN
PHA FISCAL YEARS 2005 – 2009
[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: (state mission here)

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)
- 1. Purchase or otherwise maintain Section 8 Project-based developments**
 - 2. Use of Project-Base Section 8 vouchers to preserve or expand the supply of affordable housing.**
- PHA Goal: Improve the quality of assisted housing
Objectives:
- Improve public housing management: (PHAS score)
 - Improve voucher management: (SEMAP score)
 - Increase customer satisfaction:

- Concentrate on efforts to improve specific management functions:
(list; e.g., public housing finance; voucher unit inspections)
 - Renovate or modernize public housing units:
 - Demolish or dispose of obsolete public housing:
 - Provide replacement public housing:
 - Provide replacement vouchers:
 - Other: (list below)
- PHA Goal: Increase assisted housing choices
- Objectives:
- Provide voucher mobility counseling:
 - Conduct outreach efforts to potential voucher landlords
 - Increase voucher payment standards
 - Implement voucher homeownership program:
 - Implement public housing or other homeownership programs:
 - Implement public housing site-based waiting lists:
 - Convert public housing to vouchers:
 - Other: (list below)

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

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

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

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

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

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

Other PHA Goals and Objectives: (list below)

**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.

This annual plan sets forth a comprehensive guide to Tacoma Housing Authority policies, programs, operations and strategies in meeting local housing needs and goals. The plan describes the mission of the agency, long-range goals and objectives for achieving its mission and the approach to managing programs and providing services for the upcoming year.

Tacoma Housing Authority (THA) residents and staff, City of Tacoma staff and service agency representatives collaborated in developing this plan. The annual plan was prepared in compliance with Section 511 of the Quality Housing and Work Responsibility Act of 1998 and the ensuing HUD requirements. The plan, statements, budget summary and policies in the annual plan are consistent with the City of Tacoma Consolidated Plan.

Highlights of the annual plan are summarized as follows:

- A point system to be used in implementing THA local preferences for public housing. This point system incorporates THA's plans for relocation and reoccupancy at our Salishan HOPE VI site.
- A point system to be used in implementing THA local preferences for the housing choice voucher program.
- Implementation of the Community Service Requirement at all public housing developments, in accordance with current HUD regulations. The Community Service Requirement, as designated by HUD, requires non-exempt residents to

perform eight (8) hours of volunteer community service per month or to participate in an economic self-sufficiency program. Implementation of the Community Service Requirement is burdensome for THA because of the additional costs of administering this program without the provision of adequate funding to cover the added expense of staff time and agency resources.

This year’s submission also includes updated goals and objectives in the 5 year plan for 2005 – 2009.

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

Required Attachments:

- A. Admissions Policy for Deconcentration (wa005a01)

- B. FY 2004 Capital Fund Program Annual Statement 2004 (wa005b01)
 - P&E Statement 2003-103 (wa005c01)
 - P&E Statement 2003-203 (wa005d01)

- P&E Statement 2002 (wa005e01)
 - P&E Statement 2001 (wa005f01)
 - P&E Statement 2000 (wa005g01)
 - FY2004 Replacement Housing Annual Statement 2004 (wa005h01)
 - P&E Statement 2003 (wa005i01)
 - P&E Statement 2002 (wa005j01)
 - P&E Statement 2001 (wa005k01)
 - Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)
- Optional Attachments:
- PHA Management Organizational Chart
 - FY 2004 Capital Fund Program 5 Year Action Plan (WA005l01)
 - C. Public Housing Drug Elimination Program (PHDEP) Plan
 - D. Comments of Resident Advisory Board or Boards (must be attached if not Included in PHA Plan text) (WA005m01)
 - Other (List below, providing each attachment name)
 - Pet Policy (WA005n01)
 - Leveraging of Capital Funds (WA005o01)

Supporting Documents Available for Review

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans
X	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
X	Public Housing Admissions and Continued Occupancy Policy (ACOP) with proposed revisions, which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	Section 8 Administrative Plan with proposed revisions	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 42 Lease Addendum	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 3. Exemption per 903.2(b)(2)(v).	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
	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
X	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
	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
X	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
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
	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
	The most recent Public Housing Drug Elimination Program (PHDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

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

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

Housing Needs of Families in the Jurisdiction							
By Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	8,137	5	5	5	5	5	5
Income >30% but <=50% of AMI	5,913	5	4	5	5	5	5
Income >50% but <80% of AMI	6,379	3	2	4	3	3	4
Elderly	4,646	4	4	4+	4	3+	3
Families with Disabilities	N/A	5	3	4	5	4	5
Race/Ethnicity White households	77%	5	5	4	5	4	5
Race/Ethnicity Black households	11%	5	4	4	5	4	5
Race/Ethnicity Asian households	7%	4	3	5	5	5	5
Race/Ethnicity –Native American households	2%	5	4	4	5	4	5

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

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

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one) (as of 12/31/2003)			
<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	1380	100%	90%
Extremely low income <=30% AMI	1217	88.2%	N/A
Very low income (>30% but <=50% AMI)	147	10.7%	N/A
Low income (>50% but <80% AMI)	16	1.2%	N/A
Families with children	743	53.8%	N/A
Elderly families	99	7.2%	N/A
Families with Disabilities	522	37.8%	N/A
Race/ethnicity-White	742	53.8%	N/A
Race/ethnicity-Black	431	31.2%	N/A
Race/ethnicity-Asian	145	10.5%	N/A
Race/ethnicity-N.Amer.	36	2.6%	N/A
Race/ethnicity-Pac. Isl.	26	1.9%	N/A
Characteristics by Bedroom Size (Public Housing Only)			
0BR	19	1.4%	
1BR	576	41.7%	
2 BR	520	37.7%	
3 BR	197	14.3%	
4 BR	61	4.4%	
5 BR	8	0.6%	
5+ BR	0	0.0%	
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)? 8			
Does the PHA expect to reopen the list in the PHA Plan year? NO			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			

Housing Needs of Families on the Waiting List			
Waiting list type: (select one) (as of 12/31/2003)			
<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	947	100%	12%
Extremely low income <=30% AMI	727	76.8%	
Very low income (>30% but <=50% AMI)	193	20.4%	
Low income (>50% but <80% AMI)	24	2.5%	
Families with children	582	61.5%	
Elderly families	60	6.3%	
Families with Disabilities	272	28.7%	
Race/ethnicity-White	559	59.0%	
Race/ethnicity-Black	314	33.2%	
Race/ethnicity-Asian	39	4.1%	
Race/ethnicity-N.Amer.	23	2.4%	
Race/ethnicity-Other	10	1.1%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	332	35.1%	
2 BR	376	39.7%	
3 BR	207	21.9%	
4 BR	25	2.6%	
5 BR	6	0.6%	
5+ BR	1	0.1%	
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)? 2 years			
Does the PHA expect to reopen the list in the PHA Plan year? No			
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			

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.

The agency is using a variety of approaches to addressing housing needs of the community and specifically on its waiting list. Extensive effort has been initiated to assure the best possible use of its Section 8 tenant based program, including plans to project base up to 20% of its inventory, primarily to non-profits providing housing and related services within the community. The HOPE VI program will allow for a net increase of affordable housing. A No Net Loss Agreement has been entered into with residents of the Hillside Terrace Development where some demolition and disposition is occurring. A Committee has been formed to help mitigate impacts from Section 8 Project base Opt-Outs. The Committee is comprised of City of Tacoma, HUD, THA, Low-Income Housing Coalition, etc.

(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)
 - **Admissions Preference for 100% of public housing units**

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

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

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

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

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

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

Select if applicable

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

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

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

Operate five miles outside of City limits of Tacoma

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

(2) Reasons for Selecting Strategies

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

- Funding constraints
- Staffing constraints
- Limited availability of sites for assisted housing
- Extent to which particular housing needs are met by other organizations in the community
- Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA

- Influence of the housing market on PHA programs
- Community priorities regarding housing assistance
- Results of consultation with local or state government
- Results of consultation with residents and the Resident Advisory Board
- Results of consultation with advocacy groups
- Other: (list below)

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan year.

Note: the table assumes that Federal public housing or tenant based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2004 grants)		
a)Public Housing Operating Fund	2,749,433	
b)Public Housing Capital Fund		
CFP 104 (2004)	4,326,794	
CFP 104R (2004)	93,043	
c) HOPE VI Revitalization	32,253,075	
d)HOPE VI Demolition		
1996 Hillside	72,481	
1999 Salishan	544,896	
e)Annual Contributions for Section 8 Tenant-Based Assistance	17,860,265	
f)Resident Opportunity and Self-Sufficiency Grants	525,000	
g) Capital Fund Acceleration Bonds (Salishan)	8,600,000	
h) CDBG (Salishan)	866,667	
•		
Other Federal Grants (list below)		
2. Prior Year Federal Grants (unobligated funds only) (list below)		
CFP 101R (2001)	93,043	PH Cap.Improve.
CFP 102 (2002)	1,328,867	PH Cap.Improve.

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
CFP 102R (2002)	63,348	PH Cap.Improve.
CFP 103 (2003)	1,196,537	PH Cap.Improve.
CFP 103R (2003)	65,958	PH Cap.Improve.
CFP 203 (2003) (Set Aside)	630,585	PH Cap. Improve.
3. Public Housing Dwelling Rental Income	3,756,864	Operations
4. Other income (list below)	292,410	Operations
5. Non-federal sources (list below)		
Affordable Housing Program (Federal Home Loan Bank	1,239,820	Mixed-Finance Cap. Imp. (Salishan)
State Housing Trust Fund	1,500,000	Mixed-Finance Cap. Imp. (Salishan)
Private Equity from Tax Credits	8,284,178	Mixed-Finance Cap. Imp. (Salishan)
Private Equity from Tax Credits	2,391,224	Mixed-Finance Cap.Imp..
Total resources	88,734,488	

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)

3 months

- Other: (describe)

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

- Criminal or Drug-related activity
- Rental history
- Housekeeping
- Other (describe) **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) Website with submission by mail

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

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

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

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

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

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

(3) Assignment

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

(4) Admissions Preferences

a. Income targeting:

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

b. Transfer policies:

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

- Emergencies
- Overhoused
- Underhoused
- Medical justification
- Administrative reasons determined by the PHA (e.g., to permit modernization work)
- Resident choice: (state circumstances below)
- Other: (list below)
Displacement due to THA's modernization and revitalization activities including HOPE VI

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)

Tacoma Housing Authority Local Preferences for Public Housing

THA shall issue public housing units to eligible persons on its waiting list according to the preferences below. THA shall implement these preferences by assigning units to people ranked by the designated points. Those with more points will receive units before those with fewer points. Persons with the same points shall receive units in the chronological order of the date and time of their application.

THA LOCAL PREFERENCES FOR PUBLIC HOUSING			
Preference Group	Points	Description	
First Group	50	Displaced by THA	Persons in need of housing upon their displacement by the demolition or rehabilitation of THA housing; provided that this preference shall not apply to persons to whom THA offers alternative replacement housing.
Second Group	16	Salishan Returnees	Households returning to new Salishan pursuant to THA's reoccupancy plan; limited to households whose annual income is at or less than 50% A.M.I.
Income Groups	10	Extremely Low and Very Low Income Households	Households whose Annual Income is at or less than 50% of Area Median Income
	1	Low Income Households	Households whose Annual Income is above 50% but below 80% of Area Median Income.
EXTRA POINTS: THA shall assign extra points for the following:			

15 Extra Points	Homeless Program Participant	Persons who are eligible for and selected to participate in a program to house homeless families in THA public housing units, such as units financed for the purpose by Low Income Housing Tax Credits. These extra points shall be available only for assigning households to vacant units in the Program.
2 Extra Points	Disabled, Elderly	Disabled: A household that includes a disabled person. Disability shall be shown by the current receipt of income from Social Security Disability, Social Security Retirement, SSI or GAU. Elderly: A household that includes a person who is 62 years of age or older for a 1 bedroom unit
2 Extra Points	Displaced	Persons suffering continued displacement from their homes because of: <ul style="list-style-type: none"> <input type="checkbox"/> governmental action; <input type="checkbox"/> extensive damage or destruction of their home by fire, or by a federally declared disaster; <input type="checkbox"/> being a victim of domestic violence verified by a current protection order or other reliable source of information; <input type="checkbox"/> being a victim of hate crimes verified by police information; <input type="checkbox"/> need to relocate because of their participation as a witness in a police investigation or a judicial proceeding.
1 Extra Point	Working, in School, or training	Working, Schooling or Training: A household with an adult member enrolled in an employment training program, or currently working 20 hours a week or more, or attending school full time or part time.
GENERAL		
THA may deviate from these preferences when necessary to fulfill its obligation to reasonably accommodate the needs of a disabled tenant or applicant.		
THA may deviate from these preferences when necessary to permit the return of a former Salishan resident pursuant to THA's Reoccupancy Plan for Salishan's redevelopment provided that such former residents meet other eligibility requirements for the unit.		
Notwithstanding the preferences described above, THA shall not assign any person to a public housing unit financed by the sale of Low Income Housing Tax Credits (LIHTC) unless that person satisfies the eligibility criteria governing LIHTC program and the applicable Regulatory and Operating Agreement (R&O Agreement). In the event that any provisions of this Plan and THA's Annual and Continued Occupancy Policy (ACOP) conflict with provisions of an applicable R&O Agreement, the R&O Agreement shall govern to the extent it is consistent with applicable laws and regulations.		

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

Date and Time (see above)

Former Federal preferences:

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition) (~~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) ((see above))

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)

The PHA Application Packet

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

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

(6) Deconcentration and Income Mixing

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

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

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

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

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

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

Other (list policies and developments targeted below)

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

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

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

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

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

All public housing developments are occupied by extremely low income families

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

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

B. Section 8

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

(1) Eligibility

- a. What is the extent of screening conducted by the PHA? (select all that apply)
- Criminal or drug-related activity only to the extent required by law or regulation
 - Criminal and drug-related activity, more extensively than required by law or regulation
 - More general screening than criminal and drug-related activity (list factors below)
 - Other (list below)
- b. Yes No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- c. Yes No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- d. Yes No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)
- d. Indicate what kinds of information you share with prospective landlords? (select all that apply)
- Criminal or drug-related activity
 - Other (describe below)

Landlord History

(2) Waiting List Organization

- a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (select all that apply)
- None
 - Federal public housing
 - Federal moderate rehabilitation
 - Federal project-based certificate program
 - Other federal or local program (list below)
- b. Where may interested persons apply for admission to section 8 tenant-based assistance? (select all that apply)
- PHA main administrative office
 - Other (list below)
- Site offices (if the waiting list is open)**

(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:

Verified difficulty identifying dwelling unit or inability to conduct search effectively

(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)

Tacoma Housing Authority Local Preferences for Housing Choice Vouchers

THA shall assign Housing Vouchers to eligible persons on its waiting list according to the following preferences. These preferences shall govern its issuance of Vouchers for both tenant-based and project-based purposes:

In the aggregate for each year, eighty-five percent (85%) of all Vouchers that THA issues shall go to persons whose “Annual Income” is at or below 30% of Area Median Income (AMI); fifteen percent (15%) shall go to persons whose “Annual Income” is between 31% and 50% of AMI. THA shall monitor its issuance rates and adjust its issuances as necessary to satisfy this aggregate requirement.

THA shall issue Vouchers according to the preferences below. THA shall implement these preferences by assigning Vouchers to people ranked by the designated points. Those with more points will receive vouchers before those with fewer points. Persons with the same points shall receive Vouchers in the chronological order of the date and time of their application.

THA LOCAL PREFERENCES FOR HOUSING VOUCHER PROGRAM			
Preference Group	Points	Description	
First Group	20	Displaced by THA	Persons in need of housing upon their displacement by the demolition or rehabilitation of THA housing; provided that this preference shall not apply to persons to whom THA offers alternative replacement housing.
Second Group	16	Current Project Based Voucher Holders	Persons who, for more than 12 months in the same unit, have been using a Project Based Voucher governed by a Project Based HAP Contract with THA and who then terminate their tenancy and seek to move with a tenant-based Voucher.
Third Group	10	New Project Based Program Participants: <u>Special Needs Populations</u> <i>85% of vouchers to ≤ 30% AMI; 15% of vouchers to households between 31% and 50% of AMI</i>	Persons referred by Housing Provider with whom THA has a Project-Based HAP Contract for a program serving special needs populations, or referred by THA for that program and who are willing to occupy a unit in the program using a Project Based Voucher. Special needs population includes: homeless persons, homeless persons in transitional housing, disabled persons.
Fourth Group	6	New Project Based Program Participants: <u>Regular Population</u> <i>85% of vouchers to ≤ 30% AMI; 15% of vouchers to households between 31% and 50% of AMI</i>	Persons referred by Housing Provider with whom THA has a Project-Based HAP Contract for a housing program or referred by THA for that program and who are willing to occupy a unit in the Program using Project-Based Voucher.
Income	2	<i>Households ≤ 30% AMI;</i>	All other eligible persons in these income groups

Groups	1	<i>Households 31% -50% AMI</i>	PROVIDED that 85% of vouchers issued yearly shall go to households ≤ 30% AMI and 15% shall go to households 31%-50% AMI. THA shall monitor issuance rates and adjust as necessary. THA shall not issue vouchers to households 50% - 80% AMI unless there are no applicants in lower income categories.
EXTRA POINTS: THA shall assign extra points for the following:			
2 Extra Points	Displaced	Persons suffering continued displacement from their homes because of: <ul style="list-style-type: none"> <input type="checkbox"/> governmental action; <input type="checkbox"/> extensive damage or destruction of their home by fire, or by a federally declared disaster; <input type="checkbox"/> being a victim of domestic violence verified by a current protection order or other reliable source of information; <input type="checkbox"/> being a victim of hate crimes verified by police information; <input type="checkbox"/> need to relocate because of their participation as a witness in a police investigation or a judicial proceeding. 	
1 Extra Point	Disabled	A household that includes a disabled person. Disability shall be shown by the current receipt of income from Social Security Disability, Social Security Retirement, SSI or GAU.	
GENERAL			
THA may deviate from these preferences when necessary to fulfill its obligation to reasonably accommodate the needs of a disabled tenant in THA housing.			
THA may deviate from these preferences when necessary to permit the return of a former Salishan resident pursuant to THA's Reoccupancy Plan for Salishan's redevelopment provided that such former residents meet other eligibility requirements for the Voucher and the Project-Based unit.			
THA reserves the authority to set-aside Housing Vouchers to house persons participating in approved programs serving the needs of targeted special needs populations, including homeless persons, persons who are chronically mentally ill, and the Housing Options Plan. The use of these Vouchers shall be governed by the operational plan and agreement with each providers.			

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

___ Date and Time

Former Federal preferences

Involuntary Displacement (Disaster, Government Action, ~~Action of Housing Owner, Inaccessibility, Property Disposition~~)

Victims of domestic violence

- Substandard housing

- Homelessness

- High rent burden

Other preferences (select all that apply)

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

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

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

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

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

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

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

(5) Special Purpose Section 8 Assistance Programs

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

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

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

- Through published notices
- Other (list below)

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

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

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

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

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

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

For the earned income of a previously unemployed household member

- For increases in earned income
- Fixed amount (other than general rent-setting policy)
If yes, state amount/s and circumstances below:
- Fixed percentage (other than general rent-setting policy)
If yes, state percentage/s and circumstances below:
- For household heads
- For other family members
- For transportation expenses
- For the non-reimbursed medical expenses of non-disabled or non-elderly families
- Other (describe below)

e. Ceiling rents

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

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

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

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

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

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

f. Rent re-determinations:

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

- Never

- At family option
- Any time the family experiences an income increase
- Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold)_\$50.00 per month_____
- Other (list below)
FSS applicants whose most recent re-examination exceeds 120 days

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)

Flat rent increases or decreases shall take effect upon 30 days written notice.

B. Section 8 Tenant-Based Assistance

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

(1) Payment Standards

Describe the voucher payment standards and policies.

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

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

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

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

- c. If the payment standard is higher than FMR, why has the PHA chosen this level?
(select all that apply)
- FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area
 - Reflects market or submarket
 - To increase housing options for families
 - Other (list below)
- d. How often are payment standards reevaluated for adequacy? (select one)
- Annually
 - Other (list below)
- e. What factors will the PHA consider in its assessment of the adequacy of its payment standard? (select all that apply)
- Success rates of assisted families
 - Rent burdens of assisted families
 - Other (list below)

Utility increase

(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:

2004 Annual Plan-Management

The operations of THA are overseen by a Board of Commissioners and by administrative staff. The Board consists of five (5) citizens of Tacoma appointed by statute. Consistent with QHWRA, one (1) commissioner is a Directly assisted resident or recipient of housing assistance. The Executive Director reports to the Board, and reporting to him are directors of the departments described below:

Property Management - Public Housing functions are geographically separated into three areas, each supported by property management, leasing and occupancy personnel, maintenance, and inspection services. Senior sites are locally assisted by resident keyholders/managers. Work orders are centralized.

Affordable Housing - Section 8 functions are supported by a manager who oversees leasing and occupancy, inspection services, and receptionists.

Finance – Financial support is in-house, including purchasing and inventory control. Our computer and technology support personnel report to this department.

Legal – The Legal Department is responsible for identifying THA’s need for legal services and fulfilling them, either with direct service or with the use of outside counsel.

Development – The department coordinates and inspects all modernization, revitalization, property acquisition and development activity.

Resident Services – All programs associated with resident supportive services are administered through this department. Many positions are grant-funded.

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	1400	20%
Section 8 Vouchers	3524	24%
Section 8 Certificates		
Section 8 Mod Rehab	84	30%
Special Purpose Section 8 Certificates/Vouchers (list individually)		
HOME Certificates	55	50%
Homeless Vouchers	124	40%

Other Federal Programs(list individually)		
ROSS RSDM-Elderly	349	20%
2001 ROSS RSDM-Family	120	20%
2002 ROSS RSDM	278	20%
2002 HSS	250	20%

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)

Admissions and Continued Occupancy Policy
Maintenance Policy
Pet Policy
Grievance Procedure

- (2) Section 8 Management: (list below)

Administrative Plan

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

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

A. Public Housing

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

If yes, list additions to federal requirements below:

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

B. Section 8 Tenant-Based Assistance

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

If yes, list additions to federal requirements below:

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

- PHA main administrative office
 Other (list below)

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 WA05b01.

-or-

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

(2) Optional 5-Year Action Plan

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

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

b. If yes to question a, select one:

The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state name WA005b01)

-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: Salishan

2. Development (project) number: WA19URD005100

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:

Hillside Terrace Development
Salishan Housing Development
Scattered Sites

- 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:

It is THA's policy to make full use of all available ACC operating subsidies up to the maximum permitted by federal law. That maximum is at least 1,524. THA presently has 1,400 active ACC units. That number may change further during THA's planned HOPE VI revitalization. THA reserves any number of unused ACC operating subsidies for its future use.

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

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

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

2. Activity Description

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

Demolition/Disposition Activity Description
1a. Development name: Hillside Terrace 2300 Block
1b. Development (project) number: WA19P005018
2. Activity type: Demolition <input checked="" type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one) Approved <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: (2/6/97)
5. Number of units affected: 37
6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 10/1/99 b. Projected end date of activity: 12/31/ 2002

2. Activity Description

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

Demolition/Disposition Activity Description
1a. Development name: Salishan 1b. Development (project) number: WA19URD005D99 and WA19P005003, 004, 005, 007
2. Activity type: Demolition <input checked="" type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one) Approved <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: (9/10/96)
5. Number of units affected: 88 6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 10/1/99 b. Projected end date of activity: 12/31/2006

2. Activity Description

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

Demolition/Disposition Activity Description
1a. Development name: Hillside Terrace (1500 Block) 1b. Development (project) number: WA19P005018
2. Activity type: Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one) Approved <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: ((3/06/03)

5. Number of units affected: 16
6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 04/24/02 b. Projected end date of activity: 12/31/2005

2. Activity Description

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

Demolition/Disposition Activity Description
1a. Development name: Hillside Terrace (2300 Block)
1b. Development (project) number: WA19P005018
2. Activity type: Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one) Approved <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: (11/01/2002
5. Number of units affected: 21
6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity 12/30/2002 b. Projected end date of activity: 03/01/2004

2. Activity Description

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

Demolition/Disposition Activity Description
1a. Development name: Hillside Terrace (2300 Block)
1b. Development (project) number: WA19P005018

2. Activity type: Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one) Approved <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: 11/01/2002
5. Number of units affected: 25
6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 03/01/2003 b. Projected end date of activity: 07/01/2004

2. Activity Description

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

Demolition/Disposition Activity Description
1a. Development name: Scattered Sites 1b. Development (project) number: WA19P005022;WA19P005024;WA19P005025
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 type="checkbox"/> Planned application <input checked="" type="checkbox"/>
Date application approved, submitted, or planned for submission: 12/01/04
5. Number of units affected: 34
6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 09/01/2005 b. Projected end date of activity: 09/01/2007

2. Activity Description

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

Demolition/Disposition Activity Description	
1a. Development name:	Salishan
1b. Development (project) number:	WA19URDOOSI100 and WA19P005003,004,005,,007
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 type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date application approved, submitted, or planned for submission:	02/02/2004
5. Number of units affected:	855
6. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity:	a. Actual or projected start date of activity: 06/01/2004 b. Projected end date of activity: 06/01/2009

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

[24 CFR Part 903.7 9 (i)]

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

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

2. Activity Description

Yes No: Has the PHA provided all required activity description

information for this component in the **optional** Public Housing Asset Management

Table? If “yes”, skip to component 10. If “No”, complete the Activity Description table below.

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

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

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

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

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

2. Activity Description

Yes No: Has the PHA provided all required activity description

information for this component in the **optional** Public Housing Asset Management Table? If “yes”, skip to component 11. If “No”, complete the Activity Description table below.

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

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

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

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

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

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

2. Activity Description

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

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

B. Section 8 Tenant Based Assistance

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

1. 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

2. PHA-established eligibility criteria

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

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (1)]

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

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

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

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

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

- Client referrals
 Information sharing regarding mutual clients (for rent determinations and otherwise)

- Coordinate the provision of specific social and self-sufficiency services and programs to eligible families
- Jointly administer programs
- Partner to administer a HUD Welfare-to-Work voucher program
- Joint administration of other demonstration program
- Other (describe)

B. Services and programs offered to residents and participants

(1) General

a. Self-Sufficiency Policies

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

- Public housing rent determination policies
- Public housing admissions policies
- Section 8 admissions policies
- Preference in admission to section 8 for certain public housing families
- Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA

- Preference/eligibility for public housing homeownership option participation
- Preference/eligibility for section 8 homeownership option participation
- Other policies (list below)

b. Economic and Social self-sufficiency programs

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

Services and Programs

Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)
Resident Employment Pool	195	Other	Family Investment Center	Public Housing
2001 ROSS RSDM	120	Specific criteria	Family Investment Center	Public Housing
2002 ROSS RSDM	278	Specific criteria	Family Investment Center	Public Housing
2002 HSS	250	Specific criteria	Family Investment Center	Public Housing

(2) Family Self Sufficiency program/s

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2000 Estimate)	Actual Number of Participants (As of: DD/MM/YY)
Public Housing	0	67 (10/1/01)
Section 8	35	52(10/1/01)

- 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

Tacoma Housing Authority is complying with the Community Services Requirement pursuant to section 12 (c) of the Housing Act of 1937, as amended. THA notified the Resident Advisory Board of the Community Service and Self-Sufficiency requirement in a July 29, 2003, letter.

- 1. Administrative steps being taken to implement the requirement:**
 - a. A written description of the service requirement.**
 - b. Written notification regarding the requirement. Resident Community Service status forms distributed. Each family member informed of their exempt or non-exempt status.**
 - c. A cooperative agreement has been drafted with the Department of Social and Health Services (DSHS), the local TANF agency to assist THA in verifying residents' status. The agreement is currently being reviewed and considered for signature by DSHS.**
 - d. THA Property Management department will administer the community service requirement program in coordination with local United Way and other volunteer programs.**

- 2. Programmatic aspects.**
 - a. Residents who are subject to the Community Service Requirement may fulfill their obligations by participating in local volunteer programs, Resident Council activities, or in THA's economic self-sufficiency programs and by providing documentation of participation to staff in THA's Resident Services department.**
 - b. Agencies participating in the local United Way volunteer program association may offer residents opportunities to fulfill the requirement.**
 - c. The process to cure noncompliance includes tracking and follow-up with THA Resident Services staff. Sixty days prior to lease renewal resident files are reviewed for compliance. If any one in a household is found to be non-compliant, a letter is sent informing the household of the status. Non-compliant households enter into an agreement to cure the Community Service deficiency over the next 12 months.**

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)

Periodic criminal activity in areas surrounding PHA's developments continue to concern PHA and residents.

2. What information or data did the PHA use 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)

Private Security reports

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

**Salishan
Senior Apartments
Hillside Terrace**

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)

Weed and Seed Program
Maintenance Crew Uniforms
Keyless entry at Senior Buildings
Perimeter lighting at Senior Buildings were needed

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

Salishan
Hillside Terrace

Bergerson Terrace
Senior Apartments

C. Coordination between PHA and the police

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

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

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

D. Additional information as required by PHDEP/PHDEP Plan

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

- Yes No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes No: Has the PHA included the PHDEP Plan for FY 2002 in this PHA Plan?
- Yes No: This PHDEP Plan is an Attachment.

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

SEE ATTACHMENT

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

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

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

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

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

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

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

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

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

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

1. Yes No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
 - Attached at Attachment (WA005h01)
 - Provided below:
Salishan and Hillside Terrace should be added to housing developments affected by periodic criminal activity in areas surrounding PHA's developments.
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: **Added Salishan and Hillside Terrace to the list of developments affected by periodic criminal activity.**
 - 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.)

Note: Tacoma Housing Authority has had a Resident Commissioner since 1989. The Commissioner is appointed by the Mayor.

3. Description of Resident Election Process

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

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

b. Eligible candidates: (select one)

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

c. Eligible voters: (select all that apply)

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

C. Statement of Consistency with the Consolidated Plan

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

1. Consolidated Plan jurisdiction: (City of Tacoma, Washington)

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

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

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

D. Other Information Required by HUD

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

Criteria for Significant Amendment or Modification of the Agency Plan (24 CFR§903.7(r)(ii):

Tacoma Housing Authority will consider the following changes to its 5-Year Plan and Annual Plan to be “significant” for purposes of triggering the requirements of 24 CFR§903.21, including the requirement for reconvening the Resident Advisory Board to review the changes:

- **Any change required by amendment in federal statutes, regulations or HUD notices that, in the opinion of THA, has either substantial programmatic or financial effects on the programs that its administers, or creates substantial obligations or administrative burdens beyond the programs under administration at the start of the Plan Year; or,**
- **Any change that THA’s Board determines to be significant; or,**
- **Any change that alters:**
 - **the eligibility criteria for public housing or Section 8 Vouchers;**
 - **the criteria that determines the order of preference for public housing and Section 8 Vouchers;**
 - **how much recipients will have to pay in rent or other fees while receiving public housing or Section 8 Vouchers;**
 - **any plans for demolition of any housing owned or managed by THA**
 - **any actions included in the Plan for which HUD requires a 30 day resident comment period.**
- **Any changes covering topics covered by the Plan for which HUD gave notice to applicants, tenants and program participants.**

Attachments

Use this section to provide any additional attachments referenced in the

HOUSING AUTHORITY OF THE CITY OF TACOMA
DECONCENTRATION POLICY

It is the policy of the Housing Authority of the City of Tacoma to provide for deconcentration of poverty and encourage income mixing by bringing higher income families into lower income developments and lower income families into higher income developments. Toward this end, we will skip families on the waiting list to reach other families with a lower or higher income. We will accomplish this in a uniform and non-discriminating manner.

The Housing Authority will affirmatively market its housing to all eligible income groups. Lower income residents will not be steered toward lower income developments and higher income people will not be steered to higher income developments.

Prior to the beginning of each fiscal year, we will analyze the income levels of families residing in each of the developments, the income levels of census tracts in which the developments are located, and the income levels of the families on the waiting list. Based on this analysis, we will determine the level of marketing strategies and deconcentration incentives to implement.

Annual Statement/Performance and Evaluation Report

wa005b01

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name:
Tacoma Housing Authority

Grant type and Number
Capital Fund Program Grant No: **WA19P00550104**
Replacement Housing Factor Grant No:

Federal FY of Grant:
2004

Original Annual Statement
 Reserve for Disasters/Emergencies
 P&E Report for the Program Year Ending _____

Revised Annual Statement (revision no:)
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated cost		Total Actual Cost	
		Orginal	Revised	Obligated	Expended
1				0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)	116,516.00		0.00	0.00
3	1408 Management Improvements Soft Costs	223,543.00		0.00	0.00
	Mmanagement Improvements - Hard Costs				
4	1410 Administration	365,565.00		0.00	0.00
5	1411 Audit	5,000.00		0.00	0.00
6	1415 Liquidated Damages	0.00		0.00	0.00
7	1430 Fees and Costs	427,136.00		0.00	0.00
9	1450 Site Improvements	18,000.00		0.00	0.00
10	1460 Dwelling Structures	2,382,756.00		0.00	0.00
11	1465.1 Dwelling Equipment - Non Expendable			0.00	0.00
12	1470 Nondwelling Structures	5,000.00		0.00	0.00
13	1475 Nondwelling Equipment	42,000.00		0.00	0.00
14	1485 Demolition			0.00	0.00
15	1490 Replacement Reserve	0.00		0.00	0.00
16	1492 Moving to work Demonstration				
17	1495.1 Relocation Costs	69,300.00		0.00	0.00
18	1499 Development Activities	0.00		0.00	0.00
19	1499 Bond Proceeds for Development *	8,600,000.00			
20	1502 Contingency	0.00		0.00	0.00
21	Amount of Actual Grant (sum of lines 2 - 19) *Does not include Bond Proceeds	3,654,816.00	0.00	0.00	0.00
	Amount of line 20 Related to LBP Activities				
	Amount of line 20 Related to Section 504 Compliance				
	Amount of line 20 Related to Security - Soft Costs	90,000.00	0.00	0.00	0.00
	Amount of line 20 Related to Security - Hard Costs				
	Amount of line 20 Related to Energy Conservation Measures	80,000.00			
	Collateralization Expenses or Debt Service				

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

Part II: Supporting Pages

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: WA19P00550103 Replacement Housing Factor Grant No:					
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Costs	
				Original	Revised	Funds Obligated	Funds Expended
PHA-WIDE	OPERATIONS		1406		116,516		
PHA-WIDE	MANAGEMENT IMPROVEMENTS		1408		223,543		
	1. Provide Staff Training & Education for Modernization Staff		5		7,500		
	2. Security patrol of residents PHA Wide				90,000		
	3. Establishment and Implementation of an Economic Development Program PHA-wide				75,743		
	4. Coordination of Family Support Services at Dixon Village, Bergerson, Hillside				40,300		
	6. Training for resident Council Officers				5,000		
	7. Computer software - PHA-wide - CFP portion only				5,000		
PHA-WIDE	ADMINISTRATIVE COSTS		1410		365,565		
	1. Technical and Non-technical Salaries		1410.2		285,955		
	EXECUTIVE DIRECTOR @ 6%			1	6,885		
	EXECUTIVE DIRECTOR ASST. @ 6%			1	2,837		
	DIRECTOR OF Mod & Econ Dev @ 61%			1	58,813		
	MODERNIZATION MANAGER @ 100%			1	69,640		
	MODERNIZATION COORDINATOR @ 80%			1	47,929		
	MODERNIZATION ASSIT @ 95%			1	46,035		
	FINANCE DIRECTOR @ 10%			1	7,683		
	ACCOUNTING SPECIALIST @ 25%			1	12,328		
	ACCOUNTING SPECIALIST @ 5%			1	2,466		
	PURCHASING CLERK @ 12%%			1	3,949		
	STAFF ATTORNEY @16%			1	13,784		
	FINANCE MGR @5%			1	2,640		
	MIS SPECIALIST @ 15%			1	7,802		
	HUMAN RESOURCE ADMINI @ 6%			1	3,164		
PHA-WIDE	2. Employee Benefits		1410.9	14	62,910		
	4. Sundry Expenses (Advertising)		1410.19		7,000		
	5. Legal		1410.4		5,000		
	6. Fuel for Mod Vehicles/Copier maintenance				4,700		
PHA-WIDE	AUDIT		1411		5,000		

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

Part II: Supporting Pages

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: WA19P00550103 Replacement Housing Factor Grant No:					
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Costs	
				Original	Revised	Funds Obligated	Funds Expended
	FEES AND COSTS		1430		427,136		
	1. A/E fees for Bergerson				150,000		
	2. A&E Fees Hillside Terrace				50,000		
	3. Consulting fees				150,000		
	4. Fees & Permits				1,000		
	5. Inspection Cost				66,136		
	6. Sundry Expenses (Reproduction)				10,000		
	NON-DWELLING EQUIPMENT		1475		40,000		
	Technology upgrades PHA Wide			6	10,000		
	Technology upgrades for Mod Staff			1	5,000		
WA19P005008	Washers/Driers and Garbage Compactor 1202 S M Street				25,000		
PHA-WIDE	RELOCATION COSTS		1495		69,300		
WA19P005050	BERGERSON TERRACE				2,362,756		
	Dwelling Structures	72 units	1460		2,362,756		
	- Interior Revitalization						
WA19P005018	HILLSIDE TERRACE				40,000		
	Dwelling Structures		1460		20,000		
	- Interior Revitalization						
	Site work		1450		18,000		
	Parking lots, site utilities, site lighting/security, asbestos abatement, landscaping, irrigation system						
	Washers/Dries Hillside Terrace		1475		2,000		
	NON-DWELLING STRUCTURES				5,000		
WA19P005008	902 South L Street		1470		5,000		
	Replace windows, improve HVAC - partial						
PHA-WIDE	CONTINGENCY		1502		0		

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

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: WA19P00550103 Replacement Housing Factor Grant No:					Federal FY of Grant 2004
Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
THA-Wide Management Improvements	9/17/2006			9/17/2008			
WA19P005008 M Street /Admin	9/17/2006			9/17/2008			
WA19P005026 Hillside Terrace	9/17/2006			9/17/2008			
WA19P005020 Bergerson	9/17/2006			9/17/2008			

Annual Statement/Performance and Evaluation Report

wa005c01

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name:

Grant type and Number

Federal FY of Grant:

Tacoma Housing Authority

Capital Fund Program Grant No: **WA19P00550103**

2003

Replacement Housing Factor Grant No:

Original Annual Statement Reserve for Disasters/Emergencies

Revised Annual Statement (revision no: 1)

P&E Report for the Program Year Ending 12/31/03

Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated cost		Total Actual Cost	
		Orginal	Revised	Obligated	Expended
1				0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)	0.00		0.00	0.00
3	1408 Management Improvements Soft Costs	204,072.00	204,072.00	0.00	0.00
	Mmanagement Improvements - Hard Costs				
4	1410 Administration	345,284.00	345,284.00	0.00	0.00
5	1411 Audit	5,000.00	5,000.00	0.00	0.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	277,136.00	277,136.00	1,418.00	1,418.00
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvements	125,000.00	125,000.00	0.00	0.00
10	1460 Dwelling Structures	#REF!	2,027,303.00	1,666,973.33	#REF!
11	1465.1 Dwelling Equipment - Non Expendable				
12	1470 Nondwelling Structures	95,000.00	5,000.00	0.00	0.00
13	1475 Nondwelling Equipment	40,000.00	40,000.00	0.00	0.00
14	1485 Demolition			0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to work Demonstration			0.00	0.00
17	1495.1 Relocation Costs	69,300.00	69,300.00	0.00	0.00
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1502 Contingency	0.00	0.00	0.00	0.00
20	Amount of Actual Grant (sum of lines 2 -19)	#REF!	3,098,095.00	1,668,391.33	#REF!
	Amount of line 20 Related to LBP Activities				
	Amount of line 20 Related to Section 504 Compliance				
	Amount of line 20 Related to Security - Soft Costs	90,000.00	90,000.00	0.00	0.00
	Amount of line 20 Related to Security - Hard Costs				
	Amount of line 20 Related to Energy Conservation Measures	80,000.00	80,000.00		
	Collateralization Expenses or Debt Service				

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

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: WA19P00550103 Replacement Housing Factor Grant No:						Federal FY Grant 2003
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Costs		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA-WIDE	OPERATIONS		1406		0			
PHA-WIDE	MANAGEMENT IMPROVEMENTS		1408		204,072	204,072	0	0
	1. Provide Staff Training & Education for Modernization Staff			5	7,500	7,500		
	2. Security patrol of residents PHA Wide				90,000	90,000		
	3. Establishment and Implementation of an Economic Development Program PHA-wide				51,272	51,272		
	4. Coordination of Family Support Services at Dixon Village, Bergerson, Hillside				40,300	40,300		
	6. Training for resident Council Officers				10,000	10,000		
	7. Computer software - PHA-wide - CFP portion only				5,000	5,000		
PHA-WIDE	ADMINISTRATIVE COSTS		1410		345,284	345,284	0	0
	1. Technical and Non-technical Salaries		1410.2		252,326	252,326	0	0
	EXECUTIVE DIRECTOR @ 6%			1	6,684	6,684		
	EXECUTIVE DIRECTOR ASST. @ 6%			1	2,754	2,754		
	STAFF ATTORNEY @16%			1	13,382	13,382		
	PROP MANAGEMENT DIRECTOR @ 10%			1	7,100	7,100		
	DIRECTOR OF Mod & Econ Dev @ 40%			1	37,442	37,442		
	MODERNIZATION MANAGER @ 80%			1	27,045	54,870		
	MODERNIZATION COORDINATOR @ 80%			1	46,533	46,533		
	MODERNIZATION ASSIT @ 95%			1	44,694	44,694		
	FINANCE MGR @5%			1	2,563	2,563		
	FINANCE DIRECTOR @ 10%			1	7,459	7,459		
	ACCOUNTING SPECIALIST @ 25%			1	11,969	11,969		
	ACCOUNTING SPECIALIST @ 5%			1	2,394	2,394		
	GRANT ACCOUNTANT @33%			1	15,863	0		
	PURCHASING CLERK @ 12%			1	3,835	3,835		
	MIS SPECIALIST @ 15%			1	7,575	7,575		
	PURCHASING MANAGER @ 22%			1	11,962	0		
	HUMAN RESOURCE ADMINI @ 6%			1	3,072	3,072		
PHA-WIDE	2. Employee Benefits		1410.9	17	75,758	75,758		
	3. Publication of CGP Materials		1410.14		7,000	7,000		

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

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: WA19P00550103 Replacement Housing Factor Grant No:						Federal FY Grant 2003
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Costs		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	4. Sundry Expenses (Advertising)	1410.19		500	500			
	5. Legal	1410.4		5,000	5,000			
	6. Fuel for Mod Vehicles/Copier maintenance			4,700	4,700			
PHA-WIDE	AUDIT	1411		5,000	5,000			
	FEES AND COSTS	1430		277,136	277,136	1,418	1,418	
	1. A/E fees for Salishan	1430.1		50,000	50,000			
	3. Consulting fees	1430.2		150,000	150,000	1,418.00	1418	
	4. Fees & Permits for non-residential	1430.6		1,000	1,000			
	5. Inspection Cost	1430.7		66,136	66,136			
	6. Sundry Expenses (Reproduction)	1430.19		10,000	10,000			
	NON-DWELLING EQUIPMENT	1475		40,000	40,000	0	0	
WA19P005008	Common-area furniture for M Street			5,000	5,000	0.00	0	
	Telephone upgrades PHA Wide			0	0	0.00	0	
	Technology upgrades PHA Wide			30,000	30,000	0.00	0	
	Bergerson Terrace Maint Fuirnishing			0	0	0.00	0	
	Technology upgrades for Mod Staff		1	5,000	5,000	0.00	0	
PHA-WIDE	RELOCATION COSTS	1495		69,300	69,300	0.00	0	
WA19P005006	911 Norh K Street Security Upgrades	1460		12,000	12,000	0.00	0	
WA19P005009	3201 South Fawcett Security upgrades	1460		12,000	12,000	0.00	0	
WA19P005010	602 South Wright Security upgrades	1460		12,000	12,000	0	0	
WA19P005012	5425 South Lawrence Security upgrades	1460		12,745	12,745	0	0	
WA19005013	401 North G Security upgrades	1460		12,000	12,000	0	0	
WA19P005050	Bergerson Terrace			100,000	100,000	0	0	
	Interior Work for mold control	1460		100,000	100,000	0	0	
WA19P005008	1202 South M Street			1,976,558	2,066,558	1,741,973	0	

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

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: WA19P00550103 Replacement Housing Factor Grant No:						Federal FY Grant 2003	
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Costs		Status of Work	
				Original	Revised	Funds Obligated	Funds Expended		
	- DWELLING STRUCT	1460	46	1,776,558	1,866,558	1,666,973	0		
	Interior Revitalization			1,776,558	1,866,558	1,666,973.33	0.00		
	a. New heating system, stair handrails, closet doors, window coverings								
	b. Insulate walls, upgrade bathrooms								
	c. Replace kitchen cabinets, countertops, sinks, faucets								
	d. Repaint interiors, new floor coverings								
	New Roof, common area HVAC								
	Site work	1450		125,000	125,000	0	0		
	Parking lots, site utilities, site lighting/security, asbestos abatement, landscaping, irrigation system			125,000	125,000	0	0		
	<i>Section 8 - \$75,000 - building moa</i>	1460		<i>75,000</i>	<i>75,000</i>	<i>75,000</i>	<i>0</i>		
WA19P005008	902 South L Street								
	Window Replacement	1470		5,000	5,000	0	0		
	NON-DWELLING STRUCTURES	1470		90,000	0	0	0		
WA19P005003	Remodel Salishan Admin/FIC to Support HOPE VI CSS Operations	1470		90,000	0	0	0	<i>Work completed under budget</i>	
PHA-WIDE	CONTINGENCY	1502		0	0				

Annual Statement/Performance and Evaluation Report

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

Part III: Implementation Schedule

PHA Name: Tacoma Housing Authority	Grant type and Number Capital Fund Program Grant No: WA19P00550103 Replacement Housing Factor Grant No:	Federal FY of Grant 2003
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Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
THA-Wide Management Improvements	9/31/2005			9/30/2006			
WA19P005003 Salishan	9/16/2005			9/30/2006			
WA19P005008 M Street /Admin	9/16/2005	9/31/03	9/31/03	9/30/2006			
WA19P005026 Hillside Terrace	9/16/2005			9/30/2006			
WA19P005020 Bergerson	9/16/2005			9/30/2006			
WA19P005006 911 N. K St	9/16/2005			9/30/2006			
WA19P005009 3201 S Fawcett	9/16/2005			9/31/2006			
WA19P005012 5425 S. Lawrence	9/16/2005			9/31/2006			
WA19P005013 401 North G	9/16/2005			9/31/2006			

SUPPLEMENTAL INFORMATION TO 2003 ANNUAL STATEMENT

TACOMA HOUSING AUTHORITY

SOURCE OF NON-CGP FUNDS

AMOUNT

Section 8 Reimbursement to CGP for Admin. Bldg.

75,000.00 M Street

Annual Statement/Performance and Evaluation Report wa005d01
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name: Tacoma Housing Authority	Grant type and Number Capital Fund Program Grant No: WA19P00550203 Replacement Housing Factor Grant No:	Federal FY of Grant: 2003
<input checked="" type="checkbox"/> Original Annual Statement	<input type="checkbox"/> Reserve for Disasters/Emergencies	<input type="checkbox"/> Revised Annual Statement (revision no:)
<input type="checkbox"/> P&E Report for the Program Year Ending _____	<input type="checkbox"/> Final Performance and Evaluation Report	

Line No.	Summary by Development Account	Total Estimated cost		Total Actual Cost	
		Orginal	Revised	Obligated	Expended
1				0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)	0.00		0.00	0.00
3	1408 Management Improvements Soft Costs	15,000.00		0.00	0.00
	Mnagement Improvements - Hard Costs				
4	1410 Administration	29,407.00		0.00	0.00
5	1411 Audit			0.00	0.00
6	1415 Liquidated Damages	0.00		0.00	0.00
7	1430 Fees and Costs	121,136.00		0.00	0.00
8	1440 Site Acquisition	.00		0.00	0.00
9	1450 Site Improvements			0.00	0.00
10	1460 Dwelling Structures	420,042.00		0.00	0.00
11	1465.1 Dwelling Equipment - Non Expendable			0.00	0.00
12	1470 Nondwelling Structures			0.00	0.00
13	1475 Nondwelling Equipment	15,000.00		0.00	0.00
14	1485 Demolition			0.00	0.00
15	1490 Replacement Reserve	0.00		0.00	0.00
16	1492 Moving to work Demonstration				
17	1495.1 Relocation Costs	30,000.00		0.00	0.00
18	1499 Development Activities	0.00		0.00	0.00
19	1502 Contingency	0.00		0.00	0.00
20	Amount of Actual Grant (sum of lines 2 -19)	630,585.00	0.00	0.00	0.00
	Amount of line 20 Related to LBP Activities				
	Amount of line 20 Related to Section 504 Compliance				
	Amount of line 20 Related to Security - Soft Costs		0.00	0.00	0.00
	Amount of line 20 Related to Security - Hard Costs				
	Amount of line 20 Related to Energy Conservation Measures				
	Collateralization Expenses or Debt Service				

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

Part II: Supporting Pages

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: WA19P00550203 Replacement Housing Factor Grant No:					
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Costs	
				Original	Revised	Funds Obligated	Funds Expended
PHA-WIDE	OPERATIONS		1406		0		
PHA-WIDE	MANAGEMENT IMPROVEMENTS		1408		15,000		
	3. Establishment and Implementation of an Economic Development Program PHA-wide				10,000		
	4. Coordination of Family Support Services at Dixon Village, Bergerson, Hillside				5,000		
PHA-WIDE	ADMINISTRATIVE COSTS		1410		29,407		
	1. Technical and Non-technical		1410.2		23,126		
	Salaries						
	DIRECTOR OF Mod & Econ Dev @ 10%			1	9,360		
	MODERNIZATION MANAGER @ 10%			1	6,761		
	MODERNIZATION COORDINATOR @ 10%			1	4,653		
	MODERNIZATION ASSIT @ 5%			1	2,352		
PHA-WIDE	2. Employee Benefits		1410.9	4	5,781		
	4. Sundry Expenses (Advertising)		1410.19		500		
	FEES AND COSTS		1430		121,136		
	1. A/E fees for Bergerson		1430.1		25,000		
	3. Consulting fees		1430.2		25,000		
	5. Inspection Cost		1430.7		66,136		
	6. Sundry Expenses (Reproduction)		1430.19		5,000		
	NON-DWELLING EQUIPMENT		1475		15,000		
WA19P005008	Common-area furniture for Hillside Terrace				5,000		
	Bergerson Terrace common area furniture				5,000		
	Technology upgrades for Mod Staff			1	5,000		
PHA-WIDE	RELOCATION COSTS		1495		30,000		
WA19P00526	Hillside Terrace				70,042		
	Interior Renovations						
	Reconfigure units		1460		70,042		

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

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: WA19P00550203 Replacement Housing Factor Grant No:						
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Costs		
				Original	Revised	Funds Obligated	Funds Expended	
WA19P005050	Bergerson Terrace							
	Interior Renovations	1460		50,000				
WA19P005008	1202 South M Street							
	- DWELLING STRUCT	1460	46	300,000				
	Interior Revitalization			300,000				
PHA-WIDE	CONTINGENCY		1502		0			

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

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: WA19P00550203 Replacement Housing Factor Grant No:					Federal FY of Grant 2003
Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
THA-Wide	4/27/2006			4/27/2008			
Management							
Improvements							
WA19P005008	4/27/2006			4/27/2008			
M Street /Admin							
WA19P005026	4/27/2006			4/27/2008			
Hillside Terrace							
WA19P005020	4/27/2006			4/27/2008			
Bergerson							

Annual Statement/Performance and Evaluation Report

wa005e01

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name:

Grant type and Number

Federal FY of Grant:

Tacoma Housing Authority

Capital Fund Program Grant No: **WA19P00550102**

2002

Replacement Housing Factor Grant No:

Original Annual Statement Reserve for Disasters/Emergencies

Revised Annual Statement (revision no: 2)

P&E Report for the Program Year Ending 12/31/03

Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated cost		Total Actual Cost	
		Orginal	Revised	Obligated	Expended
1	Total non-CGP Funds	75,000.00	75,000.00	0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)	0.00	0.00	0.00	0.00
3	1408 Management Improvements Soft Costs	224,500.00	224,000.00	172,375.70	34,194.02
	Mmanagement Improvements - Hard Costs				
4	1410 Administration	322,691.00	244,811.00	233,519.12	139,364.93
5	1411 Audit	5,000.00	5,000.00	0.00	0.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	477,322.00	691,486.10	687,831.82	530,384.32
8	1440 Site Acquisition	.00	0.00	0.00	0.00
9	1450 Site Improvements	125,000.00	124,876.34	124,661.78	56,288.69
10	1460 Dwelling Structures	1,931,612.00	1,762,280.56	1,432,725.70	443,717.30
11	1465.1 Dwelling Equipment - Non Expendable	0.00	0.00	0.00	0.00
12	1470 Nondwelling Structures	0.00	80,560.47	80,560.47	47,644.47
13	1475 Nondwelling Equipment	75,000.00	31,110.53	23,378.18	23,146.43
14	1485 Demolition			0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to work Demonstration				
17	1495.1 Relocation Costs	69,300.00	66,300.00	31,953.21	24,487.33
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1502 Contingency	0.00	0.00	0.00	0.00
20	Amount of Actual Grant (sum of lines 2 -19)	3,230,425.00	3,230,425.00	2,787,005.98	1,299,227.49
	Amount of line 20 Related to LBP Activities				
	Amount of line 20 Related to Section 504 Compliance				
	Amount of line 20 Related to Security - Soft Costs	90,000.00	90,000.00	0.00	0.00
	Amount of line 20 Related to Security - Hard Costs				
	Amount of line 20 Related to Energy Conservation Measures	80,000.00	800,000.00		
	Collateralization Expenses or Debt Service				

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

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: WA19P00550102 Replacement Housing Factor Grant No:						Federal FY of Grant 2002
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Costs		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA-WIDE	OPERATIONS		1406		0.00	0.00		
PHA-WIDE	MANAGEMENT IMPROVEMENTS		1408		224,500.00	224,000.00	172,375.70	34,194.02
	1. Provide Staff Training & Education for Modernization Staff			5	7,500.00	7,500.00	7,375.00	3,261.78
	2. Security patrol of residents PHA Wide				90,000.00	90,000.00	90,000.00	15,447.23
	3. Establishment and Implementation of an Economic Development Program PHA-wide				119,000.00	118,500.00	75,000.70	15,485.01
	5. Purchase Records Management System				0.00	0.00		
	6. Training for resident Council Officers				8,000.00	8,000.00		
	7. Computer software - PHA-wide - CFP portion only				0.00	0.00		
PHA-WIDE	ADMINISTRATIVE COSTS		1410		322,691.00	244,811.00	233,519.12	139,364.93
	1. Technical and Non-technical Salaries		1410.2		225,916.00	164,907.00	156,768.42	120,651.95
	EXECUTIVE DIRECTOR @ 6%			1	6,719.00	6,719.00		
	EXECUTIVE SECRETARY@ 6%			1	2,727.00	2,727.00		
	STAFF ATTORNEY @16%			1	12,992.00	12,992.00		
	PROP MANAGEMENT DIRECTOR @ 10%			1	7,103.00	7,103.00		
	DIRECTOR OF Mod & Econ Dev @ 40%			1	35,493.00	35,493.00		
	MODERNIZATION MANAGER @ 40%			1	25,501.00	25,501.00		
	MODERNIZATION COORDINATOR @ 80%			1	44,162.00	0.00		
	MODERNIZATION CLERK @ 80%			1	43,392.00	43,392.00		
	FINANCE DIRECTOR @ 10%			1	7,035.00	7,035.00		
	ACCOUNTING SPECIALIST @ 25%			1	11,289.00	11,289.00		
	ACCOUNTING SPECIALIST @ 5%			1	2,258.00	2,258.00		
	PURCHASING CLERK @ 12%			1	3,582.00	3,582.00		
	MIS SPECIALIST @ 3%			1	1,429.00	1,429.00		
	GRANT ACCOUNTANT @33%				15,263.00	0.00		
	FINANCE COODINATOR @ 5%			1	2,489.00	2,489.00		
	PURCHASING MANAGER @ 3%			1	1,584.00	0.00		
	HUMAN RESOURCE ADMINI @ 6%			1	2,898.00	2,898.00		
	2. Employee Benefits		1410.9	16	67,775.00	36,295.00	36,295.00	4,187.28
	3. Publication of CGP Materials		1410.14		4,300.00	1,000.00		
	4. Sundry Expenses (Advertising)		1410.19		10,000.00	40,109.00	40,109.00	14,243.00

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

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: WA19P00550102 Replacement Housing Factor Grant No:						Federal FY of Grant 2002	
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Costs		Status of Work	
				Original	Revised	Funds Obligated	Funds Expended		
	5. Legal	1410.4		10,000.00	1,000.00				
	6. Fuel for Mod Vehicles/Copier maintenance			4,700.00	1,500.00	346.70	282.70		
PHA-WIDE	AUDIT	1411		5,000.00	5,000.00				
PHA-WIDE	FEES AND COSTS	1430		477,322.00	691,486.10	687,831.82	530,384.32		
	1. A/E fees for Salishan	1430.1		370,963.00	370,963.00	370,963.78	370,963.78		
	2. A/E Fees for M Street			0.00	0.00			work moved to 101 2001CFP	
	3. Consulting fees	1430.2		40,336.00	137,723.00	136,132.44	82,653.60		
	4. Fees & Permits for non-residential	1430.6		1,000.00	3,929.45	3,929.45	2,929.45		
	5. Financing Fees Hillside Terrace				1,000.00	913.50	913.50		
	6. Inspection Cost	1430.7		55,023.00	55,023.00	55,023.00	43,084.55		
	7. Sundry Expenses (Reproduction)	1430.19		10,000.00	7,000.00	6,000.00	3,777.72		
	8. A&E Fees Hillside Terrace				8,687.55	8,687.55	2,379.62		
	9. Interest Draws for Hillside Terrace				23,960.10	22,982.10	22,982.10		
	10. Temp employee for Revitalization				83,200.00	83,200.00	700.00	from, 1410 admin salaries	
	NON-DWELLING EQUIPMENT	1475		75,000.00	31,110.53	23,378.18	23,146.43		
WA19P005008	Common-area furniture for M Street			5,000.00	0.00				
	Telephone Upgrades PHA wide			50,000.00	0.00				
	Technology upgrades PHA Wide			0.00	7,640.00	6,446.00	6,446.00	orig on 2002	
	Copy machine for Revite staff			15,000.00	0.00				
	Technology upgrades for Mod Staff		1	5,000.00	11,000.00	6,021.43	6,021.43		
	Non-dwelling equip for Hillside Terrace				11,089.00	10,889.00	10,679.00	orig in contractor scope	
	Furniture for mod staff				1,381.53	21.75	0.00		
PHA-WIDE	RELOCATION COSTS	1495		69,300.00	66,300.00	31,953.21	24,487.33		
WA19P00518	Hillside Terrace			565,650.00	929,627.47	783,639.41	519,371.46		
	Interior Renovations								
	Reconfigure units	1460		565,650.00	778,089.00	632,315.80	443,717.30		
	Site work	1450			108,848.00	108,633.14	56,288.69		
	Community/Laundry rom	1470			42,690.47	42,690.47	19,365.47		
WA19P005008	1202 South M Street			1,565,962.00	1,075,219.90	816,438.54	0.00		

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

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: WA19P00550102 Replacement Housing Factor Grant No:						Federal FY of Grant 2002	
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Costs		Status of Work	
				Original	Revised	Funds Obligated	Funds Expended		
	- DWELLING STRUCT	1460	46	1,365,962.00	984,191.56	800,409.90	0.00		
	Interior Revitalization								
	a. New heating system, stair handrails, closet doors, window coverings								
	b. Insulate walls, upgrade bathrooms								
	c. Replace kitchen cabinets, countertops, sinks, faucets								
	d. Repaint interiors, new floor coverings								
	New Roof, common area HVAC								
	Site work	1450		125,000.00	16,028.34	16,028.64	0.00		
	Parking lots, site utilities, site lighting/security, asbestos abatement, landscaping, irrigation system								
WA19P005008	M Street								
	<i>Section 8 - \$75,000 - roof repair</i>	1460		<i>75,000.00</i>	<i>75,000.00</i>				
	NON-DWELLING STRUCTURES	1470		0.00	37,870.00	37,870.00	28,279.00	Moved to future TBD	
WA19P005008	902 S.L. Street Admin. Bldg Windows for East and North side of bldg	1470		0.00	0.00	0.00	0.00		
WA19P005003	Remodel Salishan Admin/Fic to support HOPEVI CSS operations	1470		0.00	37,870.00	37,870.00	28,279.00	Moved partial from CFP 2003 103	
PHA-WIDE	CONTINGENCY	1502		0.00	0.00				

SUPPLEMENTAL INFORMATION TO 2002 ANNUAL STATEMENT

TACOMA HOUSING AUTHORITY

SOURCE OF NON-CGP FUNDS

AMOUNT

Section 8 Reimbursement to CGP for Admin. Bldg.

75,000.00 M Street

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary					
PHA Name: Tacoma Housing Authority		Grant type and Numer Capital Fund Program Grant No: WA19P00550101 Replacement Housing Factor Grant No:		FFY of Grant Approval 2001	
<input type="checkbox"/>	Original Annual Statement	<input type="checkbox"/>	Reserve for Disasters/Emerg	Revised Annual Statement (revision no: 3)	
<input checked="" type="checkbox"/>	Performance&Evaluation Report-Program 12/31/03	<input type="checkbox"/>	Final Performance and Evaluation Report		
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations (May not exceed 20% of line 19)	432,679.00	432,679.00	432,679.00	200,000.00
3	1408 Management Improvements - Soft Costs	246,111.00	172,867.85	172,867.85	172,028.34
	Management Improvements - Hard Costs				
4	1410 Administration	310,988.00	312,252.14	312,251.14	288,998.00
5	1411 Audit	5,000.00	0.00	0.00	0.00
6	1415 Liquidated Damages	0.00		0.00	0.00
7	1430 Fees and Costs	656,875.00	721,117.29	721,117.29	613,015.09
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvements	552,500.00	520,638.66	520,638.66	520,638.66
10	1460 Dwelling Structures	1,994,802.00	1,998,787.79	1,998,787.77	1,728,464.66
11	1465.1 Dwelling Equipment - Non Expendable	0.00	31,951.00	31,951.00	14,566.00
12	1470 Nondwelling Structures	28,722.00	28,722.00	28,722.00	28,722.00
13	1475 Nondwelling Equipment	54,411.00	63,720.61	63,720.61	61,567.39
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1495.1 Relocation Costs	15,000.00	14,351.66	14,352.68	9,943.08
17	1499 Development Activities	0.00	0.00	0.00	0.00
18	1502 Contingency (may not exceed 8% of line 19)	0.00	0.00	0.00	0.00
	Amount of Annual Grant (sum of lines 2 -18)	4,297,088.00	4,297,088.00	4,297,088.00	3,637,943.22
	Amount of line 19 Related to LBP Activities				
	Amount of line 19 Related to Section 504 Compliance				
	Amount of line 19 Related to Security-Soft costs	90,000.00	90,000.00	90,000	90,000
	Amount of line 19 Related to Security-Hard costs				
	Amount of line 19 Related to Energy Conservation Measures				
	Collateralization Expenses or Debt Service				2/23/2004

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			
Tacoma Housing Authority		Capital Fund Program Grant No: WA19P00550101				2001			
		Replacement Housing Factor Grant No:							
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work	
				Original	Revised	Funds Obligated	Funds Expended		
PHA-WIDE	OPERATIONS	1406		432,679	432,679	432,679	200,000		
PHA-WIDE	MANAGEMENT IMPROVEMENTS	1408		246,111	172,868	172,867.85	172,028.34		
	1. Provide Staff Training & Education for Modernization Support		8	15,000	6,907	6,907.00	6,288.06		
	2. Security patrol of residents PHA Wide			90,000	90,000	90,000.00	90,000.00		
	3. Establishment and Implementation of an Economic Development Program PHA-wide			116,111	74,024	74,024.35	73,803.78		
	4. Coordination of Family Support Services at			0	0			Staff position w/above	
	5. Purchase Records Management System			0	0			Moved to future TBD	
	6. Training for resident Council Officers			0	0			Moved to future TBD	
	7. Computer software - PHA-wide - CFP portion			25,000	1,937	1,936.50	1,936.50		
	8. Update PHA Master Facility Plan			0	0			From mgmt needs ass.	
PHA-WIDE	ADMINISTRATIVE COSTS	1410		310,988	312,252	312,251	288,998.00		
	1. Technical and Non-technical Salaries	1410.2		218,341	213,675	213,674	210,106.84		
	EXECUTIVE DIRECTOR @ 6%		1	6,719	6,719				
	PROP MANAGEMENT DIRECTOR @ 10%		1	7,103	7,103				
	DIRECTOR OF MOD & DEV @ 45%		1	39,930	39,930				
	MODERNIZATION MANAGER @ 65%		1	41,439	41,439				
	MODERNIZATION COORDINATOR @ 50%		1	27,602	27,602				
	MODERNIZATION CLERK @ 95%		1	40,034	40,034				
	FINANCE DIRECTOR @ 10%		1	7,305	7,305				
	ACCOUNTING SPECIALIST @ 20%		1	10,386	10,386				
	ACCOUNTING SPECIALIST @ 5%		1	2,258	2,258				
	PURCHASING CLERK @ 10%		1	2,985	2,985				
	MIS SPECIALIST @ 15%		1	7,145	7,145				
	HUMAN RESOURCE ADMINISTRATOR @6%		1	2,898	2,898				
	ATTORNEY @6%		1	4,872	4,872				
	EXECUTIVE SECRETARY @9%		1	4,090	4,090				
	FINANCE COORDINATOR @5%		1	2,489	2,489				
	PURCHASING AGENT @21%		1	11,086	6,420				
	2. Employee Benefits (22% of salaries)	1410.9	12	49,552	49,552	49,552.00	47,987.04		
	3. Publication of CGP Materials	1410.14		100	0			deleted not needed	
	4. Sundry Expenses (Advertising)	1410.19		7,000	6,618	6,618.47	5,247.07		

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			
Tacoma Housing Authority		Capital Fund Program Grant No: WA19P00550101				2001			
		Replacement Housing Factor Grant No:							
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work	
				Original	Revised	Funds Obligated	Funds Expended		
	5. Legal	1410.4		25,000	21,601	21,600.75	8,662.13		
	6. Fuel/INS for Mod Vehicles			2,275	7.92	7.92	7.92		
	7. Copier maintenance			8720	8720	8,720.00	5,900.00		
	8. Insurance for Hillside Terrace				12078	12,078.00	11,087.00		
PHA-WIDE	AUDIT	1411		5,000	0	0.00	0.00	mpve tp fitire CPG	
PHA-WIDE	FEES AND COSTS	1430		656,875	721,117	721,117	613,015.09		
	1. A/E fees for Salishan	1430.1		140,460	204,792	204,792	168,935.22		
	1. A/E fees for Hillside Terrace			39,327	1,603	1,603	1,602.00		
	2. A/E fees for Bergerson Terrace			18,282	14,793	14,793	14,793.10	work in 708	
	4. Consulting fees	1430.2		183,153	208,357	208,357	183,007.38		
	5. Fees & Permits for non-residential	1430.6		64,958	33,077	33,077	25,983.08		
	6. Inspection Cost	1430.7		58,085	51,184	51,184	51,183.98		
	7. Sundry Expenses (Reproduction)	1430.19		0	10,000	10,000	5,721.00		
	8. A&E Fees M Street			152,610	152,610	152,610	117,089.33	From 102	
	9 Financing fees Hillside Terrace				44,700	44,700	44,700.00		
PHA-WIDE	NON-DWELLING EQUIPMENT	1475		44,957	38,646	38,646	38,646		
	15. Common-area furniture for Bergerson Terrace			0	0			Moved to future grant	
	3. Tools and Equipment for Mod Staff		9	19,670	15,194	15,193.78	15,193.78		
	4. Computer Equipment for PHA wide			23,131	23,328	23,328.20	23,328.20	From 1999	
	16. Technology upgrades for Mod Staff		1	2,156	125	124.50	124.50		
PHA-WIDE	RELOCATION COSTS	1495		15,000	14,451	14,352.68	9,943.08		
WA19P005020	BERGERSON TERRACE			84,900	84,900	84,900.00	84,900.00		
	Site work	1450		20,808	43,095	43,094.88	43,094.88	From 709	
	Non Dwelling Equip - Misc	1475		9,289	22,742	22,742.00	22,741.58	From 709	
	<i>Section 8 - \$75,000 - site work</i>	1450		75,000	75,000	75,000	75,000		
	<i>RSDM 2001 Community room acoustics</i>	1470		9,900	9,900	9,900	9,900		
WA19P00518	HILLSIDE TERRACE			2,526,659	2,151,842	2,151,842	2,042,356		

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			
Tacoma Housing Authority		Capital Fund Program Grant No: WA19P00550101				2001			
		Replacement Housing Factor Grant No:							
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work	
				Original	Revised	Funds Obligated	Funds Expended		
	- DWELLING STRUCT	1460	27 units	1,994,802	1,640,015	1,640,015	1,550,067		
	2. Interior Revitalization								
	a. Replace heaters, stair handrails, closet doors, window coverings								
	b. Insulate walls, lower ceilings, upgrade								
	c. Replace kitchen cabinets, countertops, sinks,								
	d. Repaint interiors, new floor coverings throughout								
	e. Reconfigure units								
	Site work	1450		531,692	477,544	477,544	477,544		
	Sidewalks, parking lots, site utilities, site lighting/security, playground, asbestos abatement, landscaping, fencing		33 units	531,692	531,692	531,692	0		
	Dwelling Equipment	1465		0	31,951	31,951	14,566		
	Stoves and Refrigerators		52 units	0	31,951	31,951	14,566	Moved from 103-2003	
	Non Dwelling Equipment								
	Refer for comm room/fire extinguishers	1475		165	2,332	2,332	179	From 708 -1999	
WA19P005008	ADMINISTRATION BUILDING 902 S "L"	1470		28,722	28,722	28,722	28,722	From 708- 1999 (retainage)	
	Upgrades			28,722	28,722	28,722	28,722		
WA19P005008	M Street Modernization			0	358,773	358,773	178,398		
	Interior Revovation	1460		0	358,773	358,773	178,398	From 2002 DFP	
PHA-WIDE	CONTINGENCY	1502		0					

SUPPLEMENTAL INFORMATION TO 2001 ANNUAL STATEMENT

TACOMA HOUSING AUTHORITY

SOURCE OF NON-CGP FUNDS

AMOUNT

Section 8 Reimbursement to CGP for Admin. Bldg.

75,000.00 Bergerson Terrace

RSDM Grant 2001

9,900.00 Bergerson Terrace

Annual Statement/Performance and Evaluation Report

wa005g01

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name: Tacoma Housing Authority <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input checked="" type="checkbox"/> P&E Report for the Program Year Ending _12/31/2003		Grant type and Numer Capital Fund Program Grant No: WA19P005501-00 Replacement Housing Factor Grant No: Revised Annual Statement (revision no:5)	FFY Grant Approval 2000
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Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Orginal	Revised	Obligated	Expended
1	Total non-CGP Funds	75,000.00	75,000.00	75,000.00	75,000.00
2	1406 Operations (May not exceed 20% of line 19)	865,358.00	865,358.00	865,358.00	865,358.00
3	1408 Management Improvements Soft Costs	285,225.11	246,487.02	246,487.02	246,487.02
	Management Improvements Hard Costs				
4	1410 Administration	402,556.53	396,500.85	396,500.85	396,500.85
5	1411 Audit	5,000.00	0.00	0.00	0.00
7	1430 Fees and Costs	651,802.74	764,233.02	764,233.02	764,233.02
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvements	817,278.20	817,278.50	817,278.50	817,278.50
10	1460 Dwelling Structures	930,238.11	716,722.36	716,722.36	716,722.36
11	1465.1 Dwelling Equipment - Non Expendable	0.00	0.00	0.00	0.00
12	1470 Nondwelling Structures	237,313.33	397,230.36	397,230.36	397,230.36
13	1475 Nondwelling Equipment	91,586.22	92,487.90	92,487.90	92,487.90
14	1485 Demolition	1,698.93	2,073.93	2,073.93	2,073.93
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	38,736.83	28,422.06	28,422.06	28,422.06
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1502 Contingency	0.00	0.00	0.00	0.00
#	Amount of Actual Grant (sum of lines 2 -18)	4,326,794.00	4,326,794.00	4,326,794.00	4,326,794.00
#	Amount of line 19 Related to LBP Activities				
#	Amount of line 19 Related to Section 504 Compliance				
#	Amount of line 19 Related to Security	90,000.00	90,000.00	90,000.00	82,636.21
#	Amount of line 19 Related to Energy Conservation Measures				1/16/2004

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

PHA Name: Tacoma Housing Authority							Federal FY of Grant 2000	
Development Number/PHA-Wide Activities	General Description of Major Wrok Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA-WIDE	OPERATIONS	1406		865,358.00	865,358.00	865,358.00	865,358.00	
PHA-WIDE	MANAGEMENT IMPROVEMENTS	1408		285,225.11	246,487.02	246,487.02	246,487.02	
	1. Provide Staff Training & Education for		5	18,566.49	13,251.07	13,251.07	13,251.07	
	2. Security of Residents PHA Wide			90,000.00	90,000.00	90,000.00	90,000.00	
	3. Establishment and Implementation of an Economic Development Program PHA-wide			157,685.05	124,262.38	124,262.38	124,262.38	
	4. Family Support Services at Dixon Village,			18,973.57	18,973.57	18,973.57	18,973.57	
	5. Purchase Records Management System			0.00	0.00	0.00	0.00	Moved to CFP 101
	6. Computer software - PHA-wide - CFP portion			0.00	0.00	0.00	0.00	Moved to CFP 101
	7. Records Management Assess & Implem			0.00	0.00	0.00	0.00	Moved to CFP 101
	8. Upgrade Preventative Management Plan			0.00	0.00	0.00	0.00	Moved to CFP 101
	9. Data Base Software Track Revit units			0.00	0.00	0.00	0.00	Moved to CFP 101
	10. Computer Software Modernization Staff			0.00	0.00	0.00	0.00	Moved to CFP 101
PHA-WIDE	ADMINISTRATIVE COSTS	1410		402,556.53	396,500.85	396,500.85	396,500.85	
	1. Technical and Non-technical Salaries	1410.2		262,107.95	272,277.80	272,277.80	272,277.80	
	EXECUTIVE DIRECTOR @ 10%		1	9,490.00	9,490.00			
	PROP MANAGEMENT DIRECTOR @ 10%		1	7,342.00	7,342.00			
	DIRECTOR OF Mod & Econ dev @100%		1	75,000.00	85,169.85			
	MODERNIZATION MANAGER @ 100%		1	62,056.95	62,056.95			
	MODERNIZATION COORDINATOR @ 100%		1	50,279.00	50,279.00			
	MODERNIZATION CLERK MA-IV @ 100%		1	37,115.00	37,115.00			
	FINANCE DIRECTOR @ 10%		1	5,484.00	5,484.00			
	FINANCE COORDINATOR @ 25%		1	10,000.00	10,000.00			
	MIS SPECIALIST MA-IV @ 15%		1	5,341.00	5,341.00			
	2. Employee Benefits (24% of salaries)	1410.9		71,754.04	66,668.87	66,668.87	66,668.87	
	3. Publication of CGP Materials	1410.14		67.50	67.50	67.50	67.50	
	4. Sundry Expenses (Advertising)	1410.19		48,443.71	37,417.11	37,417.11	37,417.11	
	5. Legal	1410.4		14,730.50	14,730.50	14,730.50	14,730.50	
	6. Fuel for Mod Vehicles			250.00	136.24	136.24	136.24	
	7. Copier Manintenance			5,202.83	5,202.83	5,202.83	5,202.83	Moved from CGP 1999 (708)

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

PHA Name: Tacoma Housing Authority						Federal FY of Grant 2000		
Development Number/PHA-Wide Activities	General Description of Major Wrok Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA-WIDE	AUDIT	1411		5,000.00	0.00	0.00	0.00	
PHA-WIDE	FEES AND COSTS	1430		651,802.74	764,233.02	764,233.02	764,233.02	
	1. A/E fees for Salishan/Hillside Terrace	1430.1		112,727.26	272,555.55	272,555.55	272,555.55	
	2. A/E fees for Bergerson Terrace	1430.1		2,540.00	2,540.00	2,540.00	2,540.00	Moved to CGP 1999 (708)
	4. Consulting fees	1430.2		325,693.12	281,528.38	281,528.38	281,528.38	
	5. Fees & Permits for non-residential	1430.6		15,677.12	12,996.00	12,996.00	12,996.00	
	6. Inspection Cost	1430.7		74,579.86	74,576.86	74,576.86	74,576.86	
	7. Sundry Expenses (Reproduction)	1430.19		6,714.20	5,734.64	5,734.64	5,734.64	
	8 A/E Admin Bldg 902 South L	1430.1		0.00	430.41	430.41	430.41	
	9 A/E Fees for M Street	1430.2		113,871.18	113,871.18	113,871.18	113,871.18	
PHA-WIDE	NON-DWELLING EQUIPMENT	1475		46,558.85	46,245.53	46,245.53	46,245.53	
	Tools and Equipment for Force Account Crew			0.00	0.00	0.00	0.00	
	Computer Equip/tech upgrades. for Mod Staff		1	9,396.34	9,083.33	9,083.33	9,083.33	
	Office furniture for comp staff			369.58	369.58	369.58	369.58	Partial from 708 1999
	Telephone system upgrade			36,792.93	36,792.62	36,792.62	36,792.62	Partial from 102 2002
PHA-WIDE	RELOCATION COSTS	1495		38,736.83	28,422.06	28,422.06	28,422.06	
WA19P005009	FAWCETT SENIOR APTS	1450		3,344.00	3,344.00	3,344.00	3,344.00	
WA19P005020	BERGERSON TERRACE	1450		620,417.18	620,417.48	620,417.48	620,417.48	
	Site Improvements							
	Water proof foundation walls, regrade site, erosion control, renovate playground, site lighting, security			620,417.18	620,417.48	620,417.48	620,417.48	
	Bergerson Terrace Foundation							
	<i>Section 8 \$75,000</i>		21 units	<i>75,000.00</i>	<i>75,000.00</i>	<i>75,000.00</i>	<i>75,000.00</i>	
	Dwelling Structures	1460		3,931.59	3,931.59	3,931.59	3,931.59	
	Porch Lights		77 units	3,931.59	3,931.59	3,931.59	3,931.59	
	Dry Rot Repair and Replacement		44 units	0.00	0.00	0.00	0.00	Moved to 707 1998
	Dryer Vent Replacement		36 units	0.00	0.00	0.00	0.00	Moved to 707 1998
	NON DWELLING STRUCTURE	1470		149,453.65	148,216.15	148,216.15	148,216.15	
	Siding & Windows in Community Rm			0.00	0.00	0.00	0.00	work moved to 1999 (709)

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

PHA Name: Tacoma Housing Authority						Federal FY of Grant 2000		
Development Number/PHA-Wide Activities	General Description of Major Wrok Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	Maint Bldg & Property Mgmt Office			149,453.65	148,216.15	148,216.15	148,216.15	
	Non Dwelling Equipment Garbage compactor	1475		24,900.00	26,115.00	26,115.00	26,115.00	needs assessment
WA19P005014	6th AVENUE MODERNIZATION			303,982.35	303,982.34	303,982.34	303,982.34	
	Site Improvements	1450		0.00	0.00	0.00	0.00	Moved to 707 1998
	1. Install additional site lighting			0.00	0.00	0.00	0.00	
	2. Install perimeter fencing							
	3. Install site subdrainage							
	4. Upgrade parking lot							
	5. Re-landscape							
	6. Replace exterior sanitary sewer							
	7. Install H/C ramp at common room door							
	Dwelling Structures	1460	10 units	283,854.98	283,854.97	283,854.97	283,854.97	
	Comprehensive interor Modernization			283,854.98	283,854.97	283,854.97	283,854.97	Portion work moved to 1999 (708)
	a. Upgrade common area restrooms							
	b. Upgrade stairwells, c. upgrade boiler							
	d. Upgrade elevator/add elevator							
	e. Install fire sprikler system, f. Upgrade fire alarm							
	g. Install emergency generator							
	h. Renovate laundry room							
	i. Replace hall carpet							
	j. Upgrade apartment entry doors							
	k. Replace lights, switches, electrical outlets and phone jacks							
	l. Replace kitchen counter tops, sinks and faucets							
	m. Repaint apart. Interiors and replace kitchen cabinets and interior doors							
	n. Replace range hoods.							
	o. Replace bathroom, faucets, shower valves							
	p. Replace window coverings							
	q. Replace floor coverings							
	6th Avenue cont							
	r. Replace roofing							
	s. Renovate office area/add resident mgr office							

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

PHA Name: Tacoma Housing Authority							Federal FY of Grant 2000	
Development Number/PHA-Wide Activities	General Description of Major Wrok Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	t. Install corridor handrails							
	u. Renovate community rooms, corridors, lobby							
	v. Renovate ramps (ADA Approved)							
	w, Create 2nd laundry on 3rd floor							
	x. Repair window framing							
	y. Install storage shelves at common areas							
	z. Install garbage disposals							
	aa. Renovate HVAC (office)							
	ab. Upgrade Ventilation system							
	ae. Replace toilets, faucets and shower lever handles							
	DWELLING EQUIPMENT	1465		0.00	0.00	0.00	0.00	
	Replace stoves and refrigerators.		21 units	0.00	0.00	0.00	0.00	Moved to 1475
	NON DWELLING EQUIPMENT	1475		20,127.37	20,127.37	20,127.37	20,127.37	
	Washers/Dryers 6th Ave Sr Bldg			19,825.00	19,825.00	19,825.00	19,825.00	Needs assessment
	Common-area furniture for 6th Ave Sr Bldg			302.37	302.37	302.37	302.37	moved to CFP101
WA19P05007	Salishan Emergency Roofing Project	1460		157,022.51	137,505.51	137,505.51	137,505.51	
WA19P00518	HILLSIDE TERRACE			676,932.29	482,933.55	482,933.55	482,933.55	
	- DWELLING STRUCT	1460	27 units	483,415.27	289,416.53	289,416.53	289,416.53	
	Interior Revitilization			483,415.27	289,416.53	289,416.53	289,416.53	
	1. Replace heaters, stair handrails, closet doors,							
	2. Insulate walls, lower ceilings, upgrade							
	3. Replace kitchen cabinets, countertops, sinks,							
	4. Repaint interiors, new floor coveings throughout							
	5. Reconfigure units							
		1450		193,517.02	193,517.02	193,517.02	193,517.02	
	SALISHAN -							
	SALISHAN - NON-							
WA19P005003	DWELLING STRUCTURES	1470		0.00	0.00	0.00	0.00	Moved to future CGP

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

PHA Name: Tacoma Housing Authority						Federal FY of Grant 2000		
Development Number/PHA-Wide Activities	General Description of Major Wrok Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	Maintenance Facility-							
	A. Remodel to accommodate site based Prop. Mgmt							
	1. Add windows, floor covering							
	2. Add bathroom, conference room							
	3. Add walls for managers offices							
	Demolition	1485		1,698.93	2,073.93	2,073.93	2,073.93	Moved from 708
	SALISHAN/SCATTERED SITES	1460		1,663.76	1,663.76	1,663.76	1,663.76	
	3812 East R St-piping/ductwork/crawl space							
WA19P005008	1202 South M Street	1460		350.00	350.00	350.00	350.00	
	Repair wall damage							
	902 South L Admin Bldg	1460		0.00	0.00	0.00	0.00	moved to 1470
	Data lines for computers							
	Interior Remodel/HVAC upgrade	1470		87,859.68	87,859.68	87,859.68	87,859.68	From CGP 1999 (708)
WA19P005018	HILLSIDE TERRACE NON-DWELLING STRUCTURES	1470	0	0.00	161,154.53	161,154.53	161,154.53	Work moved to CGP 1998 (707)
	A. Remodel non dwelling structure to accommodate site based Prop. Mgmt			0.00	0.00	0.00	0.00	
	Community room				161,154.53	161,154.53	161,154.53	from CFP 2002
	MOD FUNDS USED FOR DEVELOPMENT	1499		0.00	0.00	0.00	0.00	
WA19P005027	Add 4 dwelling units at 2302 6th Ave			0.00	0.00	0.00	0.00	Moved work to CGP 1999 (708)
	Hillside Terrace - acquire additional property			0.00	0.00	0.00	0.00	Moved to future grant
PHA-WIDE	CONTINGENCY	1502		0.00	0.00	0.00	0.00	

SUPPLEMENTAL INFORMATION TO 2000 ANNUAL STATEMENT

TACOMA HOUSING AUTHORITY

SOURCE OF NON-CGP FUNDS

AMOUNT

Section 8 Reimbursement to CGP for Admin. Bldg.

75,000.00 Bergerson Terrace 1450



wa005h01

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

PHA Name: Tacoma Housing Authority	Grant type and Numer Capital Fund Program Grant No: Replacement Housing Factor Grant No: WA19R00550103R	FFY of Grant Approval 2004
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Original Annual Statement
 Reserve for Disasters/Emergencies
 Revised Annual Statement (revision no:)
 Performance and Evaluation Report for the 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			0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)			0.00	0.00
3	1408 Management Improvements			0.00	0.00
4	1410 Administration			0.00	0.00
5	1411 Audit			0.00	0.00
6	1415 Liquidated Damages			0.00	0.00
7	1430 Fees and Costs			0.00	0.00
8	1440 Site Acquisition			0.00	0.00
9	1450 Site Improvements			0.00	0.00
10	1460 Dwelling Structures			0.00	0.00
11	1465.1 Dwelling Equipment - Non Expendable			0.00	0.00
12	1470 Nondwelling Structures			0.00	0.00
13	1475 Nondwelling Equipment			0.00	0.00
14	1485 Demolition			0.00	0.00
15	1490 Replacement Reserve			0.00	0.00
16	1495.1 Relocation Costs			0.00	0.00
17	1499 development Acvtivities	257,288.00		0.00	0.00
18	1502 Contingency (may not exceed 8% of line 19)			0.00	0.00
	Amount of Annual Grant (sum of lines 2 -18)	257,288.00	0.00	0.00	0.00
	Amount of line 19 Related to LBP Activities				
	Amount of line 19 Related to Section 504 Compliance				
	Amount of line 19 Related to Security-Soft costs				
	Amount of line 19 Related to Security-Hard costs				
	Amount of line 19 Related to Energy Conservation Measures				
	Collateralization Expenses or Debt Service				2/23/2004



wa005i01

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

PHA Name: Tacoma Housing Authority	Grant type and Numer Capital Fund Program Grant No: Replacement Housing Factor Grant No: WA19R00550103R	FFY of Grant Approval 2003
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<input type="checkbox"/> Original Annual Statement	<input type="checkbox"/> Reserve for Disasters/Emergencies	Revised Annual Statement (revision no:)
<input checked="" type="checkbox"/> Performance/Evaluation Report for the Program YE 12/31/03 ____	<input type="checkbox"/> Final Performance and Evaluation Report	

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds			0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)			0.00	0.00
3	1408 Management Improvements			0.00	0.00
4	1410 Administration			0.00	0.00
5	1411 Audit			0.00	0.00
6	1415 Liquidated Damages			0.00	0.00
7	1430 Fees and Costs			0.00	0.00
8	1440 Site Acquisition			0.00	0.00
9	1450 Site Improvements			0.00	0.00
10	1460 Dwelling Structures			0.00	0.00
11	1465.1 Dwelling Equipment - Non Expendable			0.00	0.00
12	1470 Nondwelling Structures			0.00	0.00
13	1475 Nondwelling Equipment			0.00	0.00
14	1485 Demolition			0.00	0.00
15	1490 Replacement Reserve			0.00	0.00
16	1495.1 Relocation Costs			0.00	0.00
17	1499 development Acvtivities	65,958.00		0.00	0.00
18	1502 Contingency (may not exceed 8% of line 19)			0.00	0.00
	Amount of Annual Grant (sum of lines 2 -18)	65,958.00	0.00	0.00	0.00
	Amount of line 19 Related to LBP Activities				
	Amount of line 19 Related to Section 504 Compliance				
	Amount of line 19 Related to Security-Soft costs				
	Amount of line 19 Related to Security-Hard costs				
	Amount of line 19 Related to Energy Conservation Measures				
	Collateralization Expenses or Debt Service				

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wa005j01

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

PHA Name: Tacoma Housing Authority	Grant type and Numer Capital Fund Program Grant No: Replacement Housing Factor Grant No: WA19R00550102R	FFY of Grant Approval <u>2002</u>
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<input type="checkbox"/> Original Annual Statement	<input type="checkbox"/> Reserve for Disasters/Emergencies	Revised Annual Statement (revision no:)
<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 12/31/03		Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds			0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)			0.00	0.00
3	1408 Management Improvements			0.00	0.00
4	1410 Administration			0.00	0.00
5	1411 Audit			0.00	0.00
6	1415 Liquidated Damages			0.00	0.00
7	1430 Fees and Costs			0.00	0.00
8	1440 Site Acquisition			0.00	0.00
9	1450 Site Improvements			0.00	0.00
10	1460 Dwelling Structures			0.00	0.00
11	1465.1 Dwelling Equipment - Non Expendable			0.00	0.00
12	1470 Nondwelling Structures			0.00	0.00
13	1475 Nondwelling Equipment			0.00	0.00
14	1485 Demolition			0.00	0.00
15	1490 Replacement Reserve			0.00	0.00
16	1495.1 Relocation Costs			0.00	0.00
17	1499 development Acvtivities	63,348.00		0.00	0.00
18	1502 Contingency (may not exceed 8% of line 19)			0.00	0.00
	Amount of Annual Grant (sum of lines 2 -18)	63,348.00	0.00	0.00	0.00
	Amount of line 19 Related to LBP Activities				
	Amount of line 19 Related to Section 504 Compliance				
	Amount of line 19 Related to Security-Soft costs				
	Amount of line 19 Related to Security-Hard costs				
	Amount of line 19 Related to Energy Conservation Measures				
	Collateralization Expenses or Debt Service				2/24/2004

wa005k01

Annual Statement/Performance and Evaluation Report

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

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

Capital Fund Program(CFP) Part 1 Summary

Housing Authority of the City of Tacoma
902 South L Street, Tacoma, WA 98405

Capital Grant Number:
WA19R00550101

FFY of Grant Approval
2001

Original Annual Statement Reserve for Disasters/Emergencies Revised Annual Statement /Revision Number ____ Performance and Evaluation Report for the Program Year Ending ____
 Final Performance and Evaluation Report 12/31/2003

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised(1)	Obligated	Expended
1	Total Non-CGP Funds			0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)			0.00	0.00
3	1408 Management Improvements			0.00	0.00
4	1410 Administration			0.00	0.00
5	1411 Audit			0.00	0.00
6	1415 Liquidated Damages			0.00	0.00
7	1430 Fees and Costs			0.00	0.00
8	1440 Site Acquisition			0.00	0.00
9	1450 Site Improvements			0.00	0.00
10	1460 Dwelling Structures			0.00	0.00
11	1465.1 Dwelling Equipment - Non Expendable			0.00	0.00
12	1470 Nondwelling Structures			0.00	0.00
13	1475 Nondwelling Equipment			0.00	0.00
14	1485 Demolition			0.00	0.00
15	1490 Replacement Reserve			0.00	0.00
16	1495.1 Relocation Costs			0.00	0.00
17	1499 Development -Replacement Housing Funds	93,043.00	93,043.00	0.00	0.00
18	1502 Contingency (may not exceed 8% of line 19)			0.00	0.00
19	Amount of Actual Grant (sum of lines 2 -15)	93,043.00	93,043.00	0.00	0.00
20	Amount of line 19 Related to LBP Activities				
21	Amount of line 19 Related to Section 504 Compliance				
22	Amount of line 19 Related to Security				
23	Amount of line 19 Related to Energy Conservation Measures				2/23/2004

Signature of Executive Director and Date:
X

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

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

WA19R00550101

Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
WA19P005026	REPLACEMENT HOUSING FUNDS Hillside Terrace	1499		93,043	93043			
PHA-WIDE	CONTINGENCY	1502		0				Moved from 1997
Signature of Executive Director and Date: X				Signature of Public Housing Director/Office of Native American Programs Administrator and Date: X				

Annual Statement - 2004
 Performance and Evaluation Report
 Office of Public and Indian Housing
 Part III: Implementation Schedule

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

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

WA19R00550101

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			
	Original	Revised /1	Actual/ 2	Original	Revised /1	Actual/ 2	
WA19P005026 Hillside Terrace	3/31/2003	4/1/2005		9/30/2004	4/1/2006		Approved RHF Plan
Signature of Executive Director and Date:						Signature of Public Housing Director/Office of Native American Programs Administrator and Date:	
X						X	

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

Facsimile form HUD-52837 (10/96)
 ref Handbook 7485.3

wa005101

Five-Year Action Plan

Part 1: Summary

Capital Fund Program

U. S. Department of Housing
and Urban Development

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

Office of Public and Indian Housing

Original

Revision No: _____

Housing Authority of the City of Tacoma

TACOMA - PIERCE - WASHINGTON

Development Number/Name	Work Stmt. for Year 1 FFY: _2004_	Work Statement for Year 2 FFY: _2005	Work Statement for Year 3 FFY: _2006	Work Statement for Year 4 FFY: _2007	Work Statement for Year 5 FFY: _2008
DEBT SERVICE	SEE ANNUAL STATEMENT				
WA19P005003/004/005/007 Debt Service Bonds - Salishan for development activities		\$1,019,403	\$770,042	\$635,350	\$709,355
A. Debt Service subtotal		\$1,019,403	\$770,042	\$635,350	\$709,355
PHYSICAL IMPROVMENTS					
WA19P005008/THA Admin bldg		\$45,000			
WA19P005018/HILLSIDE TERRACE		\$1,219,331	\$645,042	\$709,355	\$709,295
WA19P005022/SCATTERED SITES WA19P005024/SCATTERED SITES WA19P005025/SCATTERED SITES		\$50,000	\$209,743		
B. Physical Improvements Subtotal		\$1,264,331	\$209,743	\$709,355	\$709,295
C. Management Improvements		\$261,500	\$217,500	\$221,500	\$221,500
D. HA-Wide Nondwelling Structures and Equipment		\$0	\$0	\$0	\$0
E. Administration	\$305,000	\$231,800	\$189,100	\$211,060	
F. Other					
a. 1430 Fees and Cost	\$50,000	\$50,000	\$50,000	\$50,000	
b. 1495.1 Relocation Cost	\$25,000	\$25,000	\$0	\$0	
c. 1502 Contingency	\$0	\$0	\$0	\$0	
d. Audit	\$5,000	\$5,000	\$5,000	\$5,000	
e. Reproduction	\$1,000	\$1,000	\$1,000	\$1,000	
G. Operations	\$101,976	\$150,000	\$104,745	\$220,794	
H. Demolition	\$0	\$0	\$0	\$0	
I. Replacement Reserve	\$0	\$0	\$0	\$0	
J. Development Activities	\$0	\$0	\$0	\$0	
K. Total CGP Funds	\$3,033,210	\$1,660,085	\$1,916,050	\$2,128,004	
Bond Proceeds used for Development Salishan WA19P005003 *	\$0	\$4,900,000	\$0	\$0	
M. Grand Total * Does not include Bond Proceeds	\$3,033,210	\$1,660,085	\$1,916,050	\$2,128,004	

Signature of Executive Director and Date:

X

Signature of Public Housing Director and Date:

X

Five-Year Action Plan
Part II: Supporting Pages
Physical Needs Work Statement(s)
Capital Fund Program (CFP)

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

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

Work Statement for Year 1	Work Statement for Year 2 2005			Work Statement for Year 3 2006		
	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost
See Annual Statement	Debt Service - Bonds Salishan		\$1,019,403	Debt Service - Bonds Salishan		\$770,042
	Hillside Terrace		\$1,219,331	Hillside Terrace		\$645,042
	Scattered Sites		\$50,000	Scattered sites		\$209,743
	THA Admin building replace east windows		\$45,000			
	Subtotal of Estimated Cost		\$2,333,734	Subtotal of Estimated Cost		\$1,624,827

Five-Year Action Plan

U. S. Department of Housing
and Urban Development

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

Part II: Supporting Pages

Office of Public and Indian Housing

Physical Needs Work Statement(s)

Comprehensive Grant Program(CGP)

Work Statement for Year 1	Work Statement for Year 4 2007			Work Statement for Year 5 2008			
	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost	
See Annual Statement	Debt Service - Bonds Salishan		\$635,350	Debt Service - Bonds Salishan		\$709,355	
	Hillside Terrace		\$709,355	Hillside Terrace		\$709,295	
Subtotal of Estimated Cost			\$1,344,705	Subtotal of Estimated Cost			\$1,418,650

Five-Year Action Plan

Part III: Supporting Pages

Management Needs Work Statement(s)

Comprehensive Grant Program(CGP)

U. S. Department of Housing

and Urban Development

Office of Public and Indian Housing

Work Statement for Year 1	Work Statement for Year 2 2005			Work Statement for Year 3 2006		
	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost
	<u>Management Improvements</u>		<u>\$261,500</u>	<u>Management Improvements</u>		<u>\$217,500</u>
	Provide staff training & Education for Mod Staff		\$7,500	Provide staff training & Education for Mod Staff		\$7,500
	Security Patrol PHA Wide		\$90,000	Security Patrol PHA Wide		\$50,000
	Economnice Dev. Program		\$114,000	Economnice Dev. Program		\$114,000
	Family Support Svcs		\$40,000	Family Support Svcs		\$40,000
	Training Resident Council Officers		\$5,000	Training Resident Council Officers		\$1,000
	Computer software PHA Wide (CFP portion only)		\$5,000	Computer software PHA Wide (CFP portion only)		\$5,000
	<u>Nondwelling Structures & Equipment</u>		<u>\$0</u>	<u>Nondwelling Structures & Equipment</u>		<u>\$0</u>
	<u>Administration</u>		<u>\$305,000</u>	<u>Administration</u>		<u>\$231,800</u>
	1. TECHNICAL & NON-TECHNICAL WAGES		\$250,000	1. TECHNICAL & NON-TECHNICAL WAGES		\$190,000
2. BENEFITS (1410.9)		\$55,000	2. BENEFITS (1410.9)		\$41,800	
<u>F. Other</u>		<u>\$81,000</u>	<u>Other</u>		<u>\$81,000</u>	
a. Fees and Costs		\$50,000	a. Fees and Costs		\$50,000	
b. Relocation		\$25,000	b. Relocation		\$25,000	
c. Contingency			c. Contingency			
d. Audit		\$5,000	d. Audit		\$5,000	
e. Reproduction		\$1,000	e. Reproduction		\$1,000	
<u>G. Operations</u>		<u>\$101,976</u>	<u>G. Operations</u>		<u>\$150,000</u>	
Subtotal of Estimated Cost			\$749,476	Subtotal of Estimated Cost \$680,300		

Five-Year Action Plan

Part III: Supporting Pages

Management Needs Work Statement(s)

Comprehensive Grant Program(CGP)

U. S. Department of Housing

and Urban Development

Office of Public and Indian Housing

Work Statement for Year 1	Work Statement for Year 4 2007			Work Statement for Year 5 2008			
	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost	
	<u>Management Improvements</u>		<u>\$221,500</u>	<u>Management Improvements</u>		<u>\$221,500</u>	
	Provide staff training & Education for Mod Staff		\$7,500	Provide staff training & Education for Mod Staff		\$7,500	
	Security Patrol PHA Wide		\$50,000	Security Patrol PHA Wide		\$50,000	
	Economice Dev. Program		\$114,000	Economice Dev. Program		\$114,000	
	Family Support Svcs		\$40,000	Family Support Svcs		\$40,000	
	Training Resident Council Officers		\$5,000	Training Resident Council Officers		\$5,000	
	Computer software PHA Wide (CFP portion only)		\$5,000	Computer software PHA Wide (CFP portion only)		\$5,000	
	<u>Nondwelling Structures & Equipment</u>		<u>\$0</u>	<u>Nondwelling Structures & Equipment</u>		<u>\$0</u>	
	<u>Administration</u>		<u>\$189,100</u>	<u>Administration</u>		<u>\$211,060</u>	
	1. TECHNICAL & NON-TECHNICAL WAGES		\$155,000	1. TECHNICAL & NON-TECHNICAL WAGES		\$173,000	
2. BENEFITS (1410.9)		\$34,100	2. BENEFITS (1410.9)		\$38,060		
<u>F. Other</u>		<u>\$56,000</u>	<u>F. Other</u>		<u>\$56,000</u>		
a. Fees and Costs		\$50,000	a. Fees and Costs		\$50,000		
b. Relocation			b. Relocation				
c. Contingency			c. Contingency				
d. Audit		\$5,000	d. Audit		\$5,000		
e. Reproduction		\$1,000	e. Reproduction		\$1,000		
G. Operations		\$104,745	G. Operations		\$220,794		
6. Contingency (1502)		\$0	6. Contingency (1502)		\$0		
Subtotal of Estimated Cost			\$571,345	Subtotal of Estimated Cost			\$653,354

ATTACHMENT E (OTHER)
LEVERAGING OF CAPITAL FUNDS

NARRATIVE:

Tacoma Housing Authority was awarded a HOPE VI revitalization grant in 2000 to revitalize the Salishan public housing community. As part of the Grant, the Authority had pledged a portion of its Capital Grant funds to the HOPE VI revitalization project. In order to accelerate the investment of Capital Grant funds in the project, and subject to approval by HUD, the Authority will undertake a financing structure which allows the Authority to issue Essential Purpose Bonds that are secured by and repaid from future funds received by the Authority under HUD's Capital Fund Program. The proceeds from the Bonds will be used to pay for the construction of infrastructure in Salishan. The types of infrastructure construction will include new roads, new sewer and water mains, new electrical distribution system, new gas lines, and other new dry utilities. The amount of Capital Grant to be allocated to repay the Bonds (principal and interest) is estimated to range from \$635,000 annually to \$1,000,000 annually, and repayment will occur over a 20 year term. The financing will be solely secured by the pledge of future funds expected to be received by the Authority under HUD's Capital Grant Program. The pledge is subject to HUD's approval and appropriations.

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

SOURCE OF FUNDS:

Financing proceeds 15,000,000

USE OF FUNDS:

Capital projects 13,500,000
 Costs of Financing 750,000
 1st years interest expense 750,000
 Total uses 15,000,000

The capital projects are expected to be completed over a 4 year or sooner period and are identified by year and project as follows:

Capital Projects	Project No.	Total Cost	Year			
			2004	2005	2006	2007
Salishan Infrastructure	NJ-00-001	13,500,000	8,600,000	-	4,900,000	
Total Cost		13,500,000	8,600,000	-	4,900,000	-

The Authority agrees to update the above schedule on an annual basis to reflect actual expenditures, as well as any revisions to the timing of the implementation of the approved scope of work.

In addition to separate pages detailing the use of capital fund financing proceeds, BLI 1501 of the 5 year plan will show the budgeted use of capital funds for the payment of debt service related to the financing.