

# PHA Plans

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

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

**PHA Plan  
Agency Identification**

**PHA Name: OSHKOSH HOUSING AUTHORITY**

**PHA Number: WI39-P113**

**PHA Fiscal Year Beginning: 07/01/2004**

**Public Access to Information**

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

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

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

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

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

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

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

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

**A. Mission**

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

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- The PHA's mission: The Oshkosh Housing Authority, a non-profit government enterprise, endeavors to assist the community in meeting the need for adequate and affordable housing opportunities for all people with a primary focus on service to low income households.

**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: Encourage development of special needs housing
- PHA Goal: Improve the quality of assisted housing  
Objectives:
- Improve public housing management: PHAS High performer '03 = 95
  - Improve voucher management: SEMAP High performer '03 = 104
  - 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:

**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:

**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)**

Preservation of existing subsidized/affordable housing options in the City of Oshkosh.

**Annual PHA Plan  
PHA Fiscal Year 2004**

**i. Annual Plan Type:**

**ii.**

**Standard Plan**

**Streamlined Plan:**

**High Performing PHA**

**Small Agency (<250 Public Housing Units)**

**Administering Section 8 Only**

**Troubled Agency Plan**

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

*The Oshkosh Housing Authority (OHA) is a high performing agency with a long and distinguished record of service to the community. The OHA is principally involved in the ownership and management of three hundred and eight-six "elderly" dwelling units in three central Oshkosh housing developments.*

*The Authority also serves families with 70 units of scattered sites public housing, a 66 unit affordable Housing Choice Voucher program and a management affiliate that owns a 72 unit multi-family site. The Oshkosh Housing Authority also manages and administers the programs of the Winnebago County Housing Authority including 146 apartments and 343 Housing Choice Vouchers. Finally, OHA also owns three group homes and has acted as a conduit for tax-exempt financing for private development of affordable housing options.*

*Goals and strategies for the coming year include:*

- preserving access to adequate program and administrative funds under the Voucher program, Operating Fund and Capital Fund,*
- continuing modernization and marketing efforts so that low-income people in the community are aware of affordable housing options in Oshkosh,*
- adding value to the units and rental experience to reduce turnover, and*
- adjusting staffing levels to program and development specific revenues*

### **iii. Annual Plan Table of Contents**

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#### **Attachments**

Indicate which attachments are provided by selecting all that apply. Provide the attachment's name (A, B, etc.) in the space to the left of the name of the attachment.

##### Required Attachments:

- A: Resident Advisory Board Membership 39
- B: Progress Report on 5-Year Plan 40
- C: FY 2002 Capital Fund Program Annual Statement and Five Year Action Plan 41-54

Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

##### Optional Attachments:

- D: PHA Management Organizational Chart
- FY 2002 Capital Fund Program 5-Year Action Plan
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- Other (List below, providing each attachment name)
- E. Pet Policy

## Supporting Documents Available for Review

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

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
<b>X</b>	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
<b>X</b>	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
<b>X</b>	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
<b>X</b>	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
<b>X</b>	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
<b>X</b>	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
<b>X</b>	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
<b>X</b>	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
<b>X</b>	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
<b>X</b>	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
<b>X</b>	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest	Annual Plan: Operations and Maintenance

### List of Supporting Documents Available for Review

Applicable & On Display	Supporting Document	Applicable Plan Component
	infestation (including cockroach infestation)	
<b>X</b>	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
<b>X</b>	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
<b>X</b>	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
<b>n/a</b>	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
<b>X</b>	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
<b>n/a</b>	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
<b>n/a</b>	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
<b>n/a</b>	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
<b>n/a</b>	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
<b>n/a</b>	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
<b>n/a</b>	Policies governing any Section 8 Homeownership program <input 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
<b>n/a</b>	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
<b>X</b>	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
<b>n/a</b>	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
<b>X</b>	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
<b>n/a</b>	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
<b>none</b>	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

# 1. Statement of Housing Needs

## 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. (2=modest impact; 3=moderate impact 4=significant impact)

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	1926	4	4	4	3	2	3
Income >30% but <=50% of AMI	2220	4	3	3	3	2	3
Income >50% but <80% of AMI	2684	2	3	3	3	2	2
Elderly	1332	2	2	1	1	2	3
Families with Disabilities	n/a	n/a	n/a	n/a	n/a	n/a	n/a
White non-Hispanic	6599	n/a	n/a	n/a	n/a	n/a	n/a
White / Hispanic	117	n/a	n/a	n/a	n/a	n/a	n/a
Black	50	n/a	n/a	n/a	n/a	n/a	n/a
Native Indian	52	n/a	n/a	n/a	n/a	n/a	n/a
Asian/Pacific Islndr.	162	n/a	n/a	n/a	n/a	n/a	n/a

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

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

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

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

<b>Housing Needs of Families on the Waiting List</b>			
Waiting list type: (select one) <input 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)			
<b>Joint OHA/WCHA</b>	# of families	% of total families	Annual Turnover
Waiting list total	461		105
Extremely low income <=30% AMI	342	74.2%	
Very low income (30%-50% AMI)	116	25.2%	
Low income (50%-80% AMI)	3	0.6%	
Families with children	291	63.1%	
Elderly families	32	7.0%	
Families with Disabilities	107	23.2%	
Hispanic	24	5.2%	
Black	35	7.6%	
Native Indian	8	1.7%	
Asian/Pacific Islndr.	22	4.8%	
Bedroom Data			
1BR	161	34.9%	
2BR	205	44.5%	
3BR	79	17.1%	
4BR	12	2.6%	
5BR	4	0.1%	
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes: How long has it been closed (# of months)? Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			

## Housing Needs of Families on the Waiting List

Waiting list type: (select one)

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

If used, identify which development/sub-jurisdiction: **Court Tower**

	# of families	% of total families	Annual Turnover
Waiting list total	44		(17%) 27
Extremely low income <=30% AMI	39	96.4%	
Very low income (>30% but <=50% AMI)	5	3.6%	
Low income (>50% but <80% AMI)	0	0%	
Families with children	0	0%	
Elderly families	4	7.1%	
Families with Disabilities	13	42.9%	
Hispanic	1	0%	
Black	5	10.7%	
Native Indian	2	0%	
Asian/Pacific Islndr.	9	17.8%	

### Characteristics by Bedroom Size

1BR	44	100.0%
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Is the waiting list closed (select one)?  No  Yes

If yes:

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

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

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

### Housing Needs of Families on the Waiting List

Waiting list type: (select one)

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

If used, identify which development/sub-jurisdiction: **Mainview**

	# of families	% of total families	Annual Turnover
Waiting list total	45		(23.6%) 26
Extremely low income <=30% AMI	40	88.9%	
Very low income (>30% but <=50% AMI)	5	11.1%	
Low income (>50% but <80% AMI)	0	0%	
Families with children	0	0%	
Elderly families	2	4.4%	
Families with Disabilities	14	31.1%	
Hispanic	1	2.2%	
Black	5	11.1%	
Native Indian	2	4.4%	
Asian/Pacific Islndr.	9	20.0%	

#### Characteristics by Bedroom Size

1BR	45	100.0%	
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Is the waiting list closed (select one)?  No  Yes

If yes:

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

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

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

## Housing Needs of Families on the Waiting List

Waiting list type: (select one)

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

If used, identify which development/subjurisdiction: **Scattered Sites**

Joint OHA/WCHA	# of families	% of total families	Annual Turnover
Waiting list total	82		(27.7%) 25
Extremely low income <=30% AMI	64	80.0%	
Very low income (>30% but <=50% AMI)	16	20.0%	
Low income (>50% but <80% AMI)	0	0%	
Families with children	74	90.2%	
Elderly families	1	1.2%	
Families with Disabilities	11	13.4%	
Hispanic	4	5.0%	
Black	10	12.5%	
Native Indian	0	0%	
Asian/Pacific Islndr.	6	7.5%	

Characteristics by Bedroom Size			
1BR	0	0.0%	
2 BR	68	85.0%	
3 BR	9	11.2%	
4 BR	2	2.6%	
5 BR	1	1.2%	

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

If yes:

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

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

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

## C. Strategy for Addressing Needs

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

*The Oshkosh Housing Authority has determined that low vacancy rates and full utilization of potential Voucher program budget authority revenues will receive priority. Management will continue to emphasize firm, fair and consistent treatment of applicants and residents to insure accurate eligibility determinations, precise rent calculations, lease compliance, and denial of benefits. The onerous federal reporting burdens remain an obstacle to developing affordable housing options and improving service delivery, but the Authority will attempt to meet the mandates and to protect or expand access to funding. The Authority will affirmatively market and implement existing programs, and pursue new resources for affordable housing if a funding award addressing a perceived need appears possible.*

### Strategies

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

##### **Strategy 1. Maximize the number of affordable units available to the PHA within its current resources by:** (Select all that apply)

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

##### **Strategy 2: Increase the number of affordable housing units by:** (select all that apply)

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

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

**Strategy 1: Target available assistance to families at or below 30 % of AMI** (select all that apply)

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

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

**Strategy 1: Target available assistance to families at or below 50% of AMI** (Select all that apply)

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

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

**Strategy 1: Target available assistance to the elderly:** (select all that apply)

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

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

**Strategy 1: Target available assistance to Families with Disabilities** (select all that apply)

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

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

**Strategy 1: Increase awareness of PHA resources among families of races and ethnicities with disproportionate needs** (select if applicable)

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

**Strategy 2: Conduct activities to affirmatively further fair housing** (select all that apply)

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

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

**(2) Reasons for Selecting Strategies**

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

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

**Statement of Financial Resources** [24 CFR Part 903.7 9 (b)]

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

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2001 grants)</b>		
a) Public Housing Operating Fund	279,538	
b) Public Housing Capital Fund	468,373	
a) HOPE VI Revitalization	0	
b) HOPE VI Demolition	0	
c) Annual Contributions for Section 8 Tenant-Based Assistance	210,483	
d) Public Housing Drug Elimination Program (including any Technical Assistance funds)	0	
e) Resident Opportunity and Self-Sufficiency Grants	44,801	
f) Community Development Block Grant	0	
g) HOME	0	
Other Federal Grants (list below)		
<b>2. Prior Year Federal Grants (unobligated funds only) list below</b>	869,884	
<b>3. Public Housing Dwelling Rental Income</b>	771,000	<i>PH Operating Budget</i>
<i>Excess Utilities</i>	4,400	<i>PH Operating Budget</i>
<b>4. Other income (list below)</b>		
<i>Interest</i>	15,000	<i>PH Operating Budget</i>
<i>Laundry Proceeds</i>	12,900	<i>PH Operating Budget</i>
<b>4. Non-federal sources (list below)</b>		
<b>Total resources</b>	2,676,379	

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

4. [24 CFR Part 903.7 9 (c)]

**A. Public Housing**

**(1) Eligibility**

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

- When families are within a certain number of being offered a unit: (state number)
- When families are within a certain time of being offered a unit: ( **60-90 days** )
- Other: (describe)

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

- Criminal or Drug-related activity
- Rental history
- Housekeeping
- Other: Check for eligibility based on debt from prior "assisted" participation

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) Winnebago County Dept. of Human Services and Christine Ann Center (RDAS)

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? FIVE

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? All lists for which they are eligible households

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 ( *fire/flood* )
- Overhoused
- Underhoused
- Medical justification
- Administrative reasons determined by the PHA (e.g., to permit modernization work)
- Resident choice: ( *if essential for established job or child care* )
- Other: (list below)

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

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

- Victims of reprisals or hate crimes
- Other preference(s) Graduates of OHA approved transitional housing programs

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.

**3** Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

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

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 (RESIDENT HANDBOOK)
- Other source (list)

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

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

## **(6) Deconcentration and Income Mixing**

- a.  Yes  No: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?
- b.  Yes  No: Did the PHA adopt any changes to its **admissions policies** based on the results of the required analysis of the need to promote deconcentration of poverty or to assure income mixing?
- c. If the answer to b was yes, what changes were adopted? (select all that apply)
- Adoption of site based waiting lists  
If selected, list targeted developments below:
- Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments  
If selected, list targeted developments below:
- Employing new admission preferences at targeted developments  
If selected, list targeted developments below:
- Other (list policies and developments targeted below)
- d.  Yes  No: Did the PHA adopt any changes to **other** policies based on the results of the required analysis of the need for deconcentration of poverty and income mixing?
- e. If the answer to d was yes, how would you describe these changes? (select all that apply)
- Additional affirmative marketing
- Actions to improve the marketability of certain developments
- Adoption or adjustment of ceiling rents for certain developments
- Adoption of rent incentives to encourage deconcentration of poverty and income-mixing
- Other (list below)
- f. Based on the results of the required analysis, in which developments will the PHA make special efforts to attract or retain higher-income families? (select all that apply)
- Not applicable: results of analysis did not indicate a need for such efforts
- List (any applicable) developments below:
- g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower-income families? (select all that apply)
- Not applicable: results of analysis did not indicate a need for such efforts
- List (any applicable) developments below:

## **B. Section 8**

### **(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 ( check previous "assisted" tenancies for any debts )
- Other (list below)
- b.  Yes  No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

- c.  Yes  No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- d.  Yes  No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)
- e. Indicate what kinds of information you share with prospective landlords? (select all that apply)
- Criminal or drug-related activity
- Other ( *Identity of current and one previous landlord* )

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

- a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged?
- 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?
- PHA main administrative office
- Other ( *Winnebago County Dept. Of Human Services and Christine Ann Center(RDAS)* )

## **(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: *Evidence of medical incident that significantly impaired search and/or, complete search history documenting sustained and significant effort*

## **(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) Graduates of OHA approved transitional housing programs

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): Graduates of OHA approved transitional housing programs

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

- 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) Not Applicable

- 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**

**(1) Income Based Rent Policies**

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 : Case by case review

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: Flat Rents if selected by Lessee

Bedrooms	<i>Zero</i>	<i>One</i>	<i>Two</i>	<i>Three</i>	<i>Four</i>	<i>Five</i>
Max. Rent	\$250	\$300	\$400	\$500	\$600	\$700

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)

- 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

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

- Never
- At family option ( *Decreased household income* )
- 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) **\$200**
- Other (list below) ( *Any change in Family Composition* )

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

**(2) Flat Rents**

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

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

## B. Section 8 Tenant-Based Assistance

**(1) Payment Standards** Describe the voucher payment standards and policies.

a. What is the PHA's payment 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?

- 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?

- 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?

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

### **(2) Minimum Rent**

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

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

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

## 5. Operations and Management

### A. PHA Management Structure

Describe the PHA's management structure and organization.

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

### B. HUD Programs Under PHA Management

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	336	78
Section 8 Vouchers	76	17
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers		
Public Housing Drug Elimination Program		
Other Federal Programs		
Marian Manor ( <i>S/8 New</i> )	120	18
Cumberland Ct. ( <i>HUD 236</i> )	72	31
ESC Grant (ROSS)	n/a	n/a

### 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  
Maintenance Plan      Pest Policy      Lease
- (2) Section 8 Management: Administrative Plan

## 6. PHA Grievance Procedures

### 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**

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

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

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

Select one:

- The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name) **CFP #: WI39 P113-50104** -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 as **( FY2004 5-Year Modernization Plan )** -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)**

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

1. Development name:

2. Development (project) number:

3. Status of grant: (select the statement that best describes the current status)

- Revitalization Plan under development  
 Revitalization Plan submitted, pending approval

- Revitalization Plan approved
- Activities pursuant to an approved Revitalization Plan underway

- Yes  No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?  
If yes, list development name/s below:
- Yes  No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?  
If yes, list developments or activities below:
- Yes  No: e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?  
If yes, list developments or activities below:

**8. Demolition and Disposition** [24 CFR Part 903.7 9 (h)]

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

2. Activity Description

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

<b>Demolition/Disposition Activity Description</b>
1a. Development name: Court Tower 1b. Development (project) number: WI39/005
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: (06/30/2004)
5. Number of units affected: four
6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development (4 units in 156 unit high-rise) <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: b. Projected end date of activity: 06/30/2005

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

- 1.  Yes  No: Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly

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

2. Activity Description

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

<b>Designation of Public Housing Activity Description</b>	
1a. Development name: Court Tower	
1b. Development (project) number: WI 213/005	
2. Designation type:	
Occupancy by only the elderly <input checked="" type="checkbox"/>	
Occupancy by families with disabilities <input type="checkbox"/>	
Occupancy by only elderly families and families with disabilities <input type="checkbox"/>	
3. Application status (select one)	
Approved; included in the PHA’s Designation Plan <input type="checkbox"/>	
Submitted, pending approval <input type="checkbox"/>	
Planned application <input checked="" type="checkbox"/>	
4. Date this designation approved, submitted, or planned for submission: (03/30/2005)	
5. If approved, will this designation constitute a (select one)	
<input checked="" type="checkbox"/> New Designation Plan	
<input type="checkbox"/> Revision of a previously-approved Designation Plan?	
6. Number of units affected: 156	
7. Coverage of action (select one)	
<input checked="" type="checkbox"/> Part of the development	
<input type="checkbox"/> Total development	

**10. Conversion of Public Housing to Tenant-Based Assistance**

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

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

2. Activity Description

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

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

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

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

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

**11. Homeownership Programs Administered by the PHA**

**A. Public Housing**

1.  Yes  No: Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under section 5(h), the HOPE I program, or section 32 of the

U.S. Housing Act of 1937 (42 U.S.C. 1437z-4). (If “No”, skip to component 11B; if “yes”, complete one activity description for each applicable program/plan, unless eligible to complete a streamlined submission due to small PHA or high performing PHA status. PHAs completing streamlined submissions may skip to component 11B.)

2. Activity Description

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

<b>Public Housing Homeownership Activity Description (Complete one for each development affected)</b>	
1a. Development name: Scattered-sites	
1b. Development (project) number: WI 113 / 002	
2. Federal Program authority:	
<input type="checkbox"/>	HOPE I
<input checked="" 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 checked="" type="checkbox"/>	Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: (03/31/2005)	
5. Number of units affected: 6	
6. Coverage of action: (select one)	
<input checked="" type="checkbox"/>	Part of the development
<input type="checkbox"/>	Total development

**B. Section 8 Tenant Based Assistance**

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

2. Program Description:

a. Size of Program

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

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

- 25 or fewer participants  
 26 - 50 participants

- 51 to 100 participants
- more than 100 participants

b. PHA-established eligibility criteria

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

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

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

1. Cooperative agreements:

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

2. Other coordination efforts between the PHA & 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,main office / other provider name)	Eligibility (public housing or section 8 participants or both)
<i>Nutrition Site</i>	<i>100</i>	<i>Self-select</i>	<i>ADVOCAP</i>	<i>General public</i>
<i>Health/Wellness Service</i>	<i>200</i>	<i>Self-select</i>	<i>"Elderly" buildings</i>	<i>Site residents</i>
<i>Resident Activities Program</i>	<i>300</i>	<i>Self-select</i>	<i>"Elderly" buildings</i>	<i>Site residents</i>
<i>Social Services Program</i>	<i>120</i>	<i>Self-select/Referral</i>	<i>"Elderly" buildings</i>	<i>Site residents</i>

**(2) Family Self Sufficiency program/s**

a. Participation Description

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

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

**C. Welfare Benefit Reductions**

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)

- Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies
- Informing residents of new policy on admission and reexamination
- Actively notifying residents of new policy at times in addition to admission and reexamination.
- Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
- Establishing a protocol for exchange of information with all appropriate TANF agencies
- Other: (list below)

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

**13. PHA Safety and Crime Prevention Measures** [24 CFR Part 903.7 9 (m)]

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

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

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

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

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

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

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

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

1. List the crime prevention activities the PHA has undertaken or plans to undertake:

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

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

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

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

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

- Agreement between PHA and local law enforcement agency for provision of above-baseline law enforcement services
  - Other activities (list below)
2. Which developments are most affected? (list below)

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

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

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

**14. PET POLICY: 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**

- 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**

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?
  - 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**

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

1.  Yes  No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
- Attached at Attachment (File name)
- Provided as follows: 1) rearrange existing priorities
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: 1 - **To accelerate replacement of window treatments**
- Other: (list below)

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

1.  Yes  No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)
2.  Yes  No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)
3. Description of Resident Election Process
- a. Nomination of candidates for place on the ballot: (select all that apply)
- Candidates were nominated by resident and assisted family organizations
- Candidates could be nominated by any adult recipient of PHA assistance
- Self-nomination: Candidates registered with the PHA and requested a place on ballot
- Other: Candidates self-nominated by contacting the PHA and resumes were forwarded to the Mayor
- 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): City Council

### **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 Oshkosh**

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)
  - Concentrate assistance to needy very low and extremely low-income renters*
  - Support efforts of low-income renters to move up to home ownership*
  - Affirmatively market affordable housing programs*
  - Maintain and improve quality public housing properties and its management*
- Other: (list below)

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

Block grant funds committed to OHA Home Buyers program

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

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

### **Attachments Follow**

**Resident Advisory Board – Mainview**

Amy Egner	Shirley Longsine	Charles Bavry
Darryl Raab	Tom Knight	Emil Froemming
Claire Palfrey	Bruce Moede	Sonja Moede
Eugene Nicolasion	Mary Hahn	Marie Smith
Gertrude Braun	Caroline Hobbs	Judy Doemel
Thelma Falch	Ann Powell	Juanita Amos
Rob Paterson	Lillian Winton	

**Marian Manor Resident Meeting: 1/21/04**

Sharon Liese	Carole Tompkins	Karen Hopp
Lois Gaines	Mary Nevers	Miriam Valcarcel
Olga Murphy	Norma Martin	Madge Mauritz
Virginia Ruch	Bill Albee	Paula Albee
Carol Knutzen	Dolly Masterson	Margaret Parker
Mae Helmer	Germaine Kloiber	Marge Schneider
Clara Helf	David Pratt	Michael Bruneau
Vanessa Hartl	Violet Kramer	Delores Gumlick
Charles Ducker	Ned Geerdts	Loretta Mech
Eunice Coates	Lucille Hinz	Pat La Rose
Dorothy Youngwirth		
Frieda Wellman		
Charlotte Voelzke		
Lorraine Barsh		
Becky Busha		
Susanna Berwald		
Matilda Krueger		

**Resident Advisory Board - Court Tower 1/20/2004**

Dorothy Haskamp	Jane Heidl	Elizabeth Sherwood
Clara Wegner	Millie Meisel	Cordelia Cumber
Marvel Reischl	Don Traugott	Roxanne Goodrich
Esther Sperlich	Debra Miller	Juanita Becker
David Towne	Irene Mathias	Wanda Hall
Helen Meyer	Gary Ruedinger	Fern Christensen
Lisa Loring	Jean Veith	Lavonne Silvagni
James Weidl	Peggy Bostwick	Loretta Blechl
Janell Brook	Arden Robl	

## Attachment B: Progress Report on 5-Year Plan

The Five-year plan was updated annually until this year coincidental to development of the Annual Plan. The annual plan development process has provided a forum for internal and external reviews of policies, processes and priorities. The increased emphasis on regulatory compliances documents a history of success as evidenced by repeated certification of this agency as a HUD High Performer.

The inclusion of 2000 Census data in the needs assessment clearly shows the under-served households and confirms this agency's priorities, adopted in earlier plans, were on target. Our site-based waiting lists and our policy of keeping long waiting lists "open" has helped us direct our efforts to the most under-served populations.

We continue to invest several hundred thousand dollars annually into the public housing properties to improve the accommodations and sustain the systems and structures. However, HUD's diminishing commitment to full funding of the Capital Fund Program forces the backlog of work remaining to grow. Further, cuts to the Operating Fund subsidy, the elimination of a utility cost adjustment and un-funded mandates like the Community Service requirement force operating costs onto the Capital Fund ledger further retarding our efforts to be fully competitive in today's rental housing market.

The continued absence of fair share Housing Choice Vouchers remains a major impediment to addressing the unmet need in the community. Efforts to morph the successful program into a block grant or flexible benefit are a constant distraction requiring analysis, education and a political response. Despite full utilization of all available funds the typical wait for an available Voucher is expect to be a couple of years, doubling the delay when the Five Year Plan was originally adopted.

Virtually all of the Work Items identified in the original five-year plan were completed. Little policy or process change was implemented other than those new policies mandated by HUD when it created the Agency Plan.

The plan continues to strive for flexible growth to deliver more options through timely innovation and quality administration, while preserving available program and community opportunities.

Robert Weiner continues to serve as the resident Commissioner.

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

<b>PHA Name: OSHKOSH HOUSING AUTHORITY</b>	<b>Grant Type and Number</b> Capital Fund Program Grant No: <b>WI39 P113 50100</b> Replacement Housing Factor Grant No:	<b>Federal FY of Grant:</b> <b>2000</b>
--	---	--

Original Annual Statement  Reserve for Disasters/ Emergencies  Revised Annual Statement Revision #3  
 Performance and Evaluation Report for Period Ending: 12/31/02  Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements Soft Costs Management Improvements Hard Costs				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	18,618	33,000	33,000	31,500
8	1440 Site Acquisition				
9	1450 Site Improvement	105,000			
10	1460 Dwelling Structures	329,200	349,300	394,300	386,500
11	1465.1 Dwelling Equipment—Nonexpendable		120,358	120,358	
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1502 Contingency	39,373	6,391		
	Amount of Annual Grant: (sum of lines.....)	492,191	492,191	464,406	443,673
	Budgeted Costs Related to LBP Activities				
	Budgeted Costs Related to Section 504 compliance				
	Budgeted Costs Related to Security –Soft Costs		7,800		
	Budgeted Costs related to Security-- Hard Costs				
	Budgeted Costs 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**

PHA Name: <b>OSHKOSH HOUSING AUTHORITY</b>		Grant Type and Number Capital Fund Program Grant No: <b>WI39 P113 50100</b> Replacement Housing Factor Grant No:			Federal FY of Grant: <b>2000</b>	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement Revision #3 <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 12/31/02 <input type="checkbox"/> Final Performance and Evaluation Report						
Line No.	Summary by Development Account	Total Estimated Cost			Total Actual Cost	

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

PHA Name: <b>OSHKOSH HOUSING AUTHORITY</b>		Grant Type and Number Capital Fund Program Grant No: <b>WI39 P113 501/00</b> Replacement Housing Factor Grant No:			Federal FY of Grant: <b>2000</b>			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised			
WI39 P113 - 002	Mainview Parking Lot Improvements	1450		105,000	0	0		Deferred
WI39 P113 - 002	Security Systems Additions	1450						Completed
WI39 P113 - 002	Mainview HVAC Improvements	1465.1		0	67,013	67,013		Completed
WI39 P113 - 003	Forty Family Window Replacements	1460	24	75,000	68,100	68,100		Expended
WI39 P113 - 003	Forty Family Build Garages	1460			0			Deferred
WI39 P113 - 005	Thirty Family Build Garages	1470						Deferred
WI39 P113 - 005	Security Systems Additions	1450			2,800	2,023		Completed
WI39 P113 - 005	Court Tower Window Replacement	1460	156	254,200	273,400	272,974		Expended
WI39 P113 - 005	Court Tower HVAC Improvements	1465.1			53,435	53,435		Expended
HA-WIDE	Architectural & Engineering	1430		18,618	31,261	31,261		Expended
HA-WIDE	Contingency							

**Part III: Implementation Schedule**

Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
WI39 P113 - 002/3/5	06/30/01	09/30/02		12/31/01	03/31/03		Insurance against any delays

## Annual Statement/Performance and Evaluation Report

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

<b>PHA Name: OSHKOSH HOUSING AUTHORITY</b>	<b>Grant Type and Number</b> Capital Fund Program Grant No: <b>WI39 P113 501/01</b> Replacement Housing Factor Grant No:	<b>Federal FY of Grant:</b>  <b>2001</b>
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Original Annual Statement  
  Reserve for Disasters/ Emergencies  
  Revised Annual Statement Revision #3  
 Performance and Evaluation Report for Period Ending: 12/02  
  Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements Soft Costs	4,000	3,000		
	Management Improvements Hard Costs	8,000	5,000		
4	1410 Administration	28,000	28,044	28,044	28,044
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	12,800	13,200	13,110	13,110
8	1440 Site Acquisition				
9	1450 Site Improvement	120,000			
10	1460 Dwelling Structures	158,000	332,050	332,050	328,603
11	1465.1 Dwelling Equipment—Nonexpendable	94,000	35,000	35,000	00
12	1470 Nondwelling Structures	75,000	82,900	82,897	82,897
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1502 Contingency	2,775	2,850	2810	2,810
	Amount of Annual Grant: (sum of lines.....)	502,044	502,044	493,911	455,464
	Budgeted Costs Related to LBP Activities				
	Budgeted Costs Related to Section 504 compliance				
	Budgeted Costs Related to Security –Soft Costs				
	Budgeted Costs related to Security-- Hard Costs	108,000	???		
	Budgeted Costs 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 II: Supporting Pages**

PHA Name: <b>OSHKOSH HOUSING AUTHORITY</b>		Grant Type and Number Capital Fund Program Grant No: <b>WI39 113 501/01</b>				Federal FY of Grant: <b>2001</b>	
Development # / Name	General Description of Major Work Categories	Acct No.	Quantity	Total Estimated Cost		Total Actual Cost	Status of Work
WI39 P113 002 (MV)	Hi-Security Master & New Doors	1460	120	36,000	140,000		
WI39 P113 002 (MV)	Replace Ranges & 7 Refrigs.	1465.1	110	36,000	35,000		
WI39 P113 002 (MV)	Finish HVAC Tower Work	1460			2,525		
WI39 P113 002 (MV)	Common Area Tile Walkways	1460		18,000	44,525		
WI39 P113 002 (MV)	<del>Upgrade Hot Water Heating</del>	1465.1		18,000	00		
WI39 P113 002 (MV)	<del>Create/Furnish Resident Lounges</del>	1460		00	0		
WI39 P113 003 (Forty)	Renovate Dwelling Units	1460	0	0	0		
WI39 P113 005 (CT)	<del>Parking &amp; Access Improvements</del>	1450		120,000	00		
WI39 P113 005 (CT)	Convert Units to Common Area	1460	0	00	00		
WI39 P113 005 (CT)	Hi-Security Master & New Doors	1460	166	72,000	100,000		
WI39 P113 005 (CT)	Common Area Tile Walkways	1460		32,000	45,000		
WI39 P113 005 (Thirty)	Build Garages	1460	5	75,000	82,900		
WI39 P113 005 (Thirty)	<del>Replace Kitchen Appliances</del>	1465.1	54	40,000	00		
HA-Wide	Architectural & Engineering	1430		12,800	13,200		
HA-Wide	Management Improvements	1408		12,000	8,000		
HA-Wide	Administration	1410		28,000	28,044		
HA-Wide	Contingency			2,200	2,850		

**Annual Statement/Performance and Evaluation Report**

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

**Part III: Implementation Schedule**

PHA Name: OSHKOSH HOUSING AUTHORITY		Grant Type and Number Capital Fund Program No: <b>WI39 113 50101</b>				Federal FY of Grant: <b>2001</b>	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
HA-WIDE	10/01/02	06/30/03		03/31/2004	06/30/05		Real estate negotiations w/ environmental concerns

# Annual Statement/Performance and Evaluation Report

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

### Part 1: Summary

PHA Name: <b>OSHKOSH HOUSING AUTHORITY</b>		Grant Type and Number Capital Fund Program Grant No: <b>WI39 P113 501/02</b>		Federal FY of Grant: <b>2002</b>	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (Revision: #1) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: 12/02 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements Soft Costs	4,000	4,000		
	Management Improvements Hard Costs	8,000	8,000		
4	1410 Administration	32,000	32,000	32,000	31,955
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	22,000	24,000	23,500	12,291
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	332,000	336,000	336,000	
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures	63,000	63,000	63,000	63,000
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1502 Contingency	7,373	1,373		
	Amount of Annual Grant: (sum of lines.....)	468,373	468,373	454,500	107,246
	Budgeted Costs Related to LBP Activities				
	Budgeted Costs Related to Section 504 compliance				
	Budgeted Costs Related to Security –Soft Costs				
	Budgeted Costs related to Security-- Hard Costs				
	Budgeted Costs 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 II: Supporting Pages

PHA Name: <b>OSHKOSH HOUSING AUTHORITY</b>		Grant Type and Number Capital Fund Program Grant No: <b>WI39 113 50102</b>					Federal FY of Grant <b>2002</b>	
Development Number Name / HA-Wide	General Description of Major Work Categories	Qty.	Acct No.	Quantity	Total Estimated Cost		Total Actual Cost	Status of Work
P113 002 (MV)	Elevator Modernization	1	1460		160,000	50,000		
P113 002 (MV)								
P113 003 (Forty)								
P113 005 (CT)	<del>Apt. Remodel to Laundry/Lounge</del>	4			28,000	00		
P113 005 (CT)	Elevator Modernization		1460		144,000	286,000		
P113 005 (CT)								
P113 003 (Thirty)	Build Garages	9	1470		63,000	63,000		
P113 003 (Thirty)								
HA-Wide	<del>Shuttle Bus</del>							
HA-Wide	Administration		1410		32,000	32,000		
HA-Wide	Management Improvements		1408		12,000	12,000		
HA-Wide	Architectural & Engineering		1430		22,000	24,000		
	Contingency		1502		7,373	1,373		

**Annual Statement/Performance and Evaluation Report**

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

Part III: Implementation Schedule

PHA Name: <b>OSHKOSH HOUSING AUTHORITY</b>		Grant Type and Number Capital Fund Program No: <b>WI39 113 50102</b>					Federal FY of Grant: <b>2002</b>	
Development Number Name/HA-Wide	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates	
	Original	Revised	Actual	Original	Revised	Actual		
HA-WIDE	03/30/2004	06/30/2004		03/30/2006			Utilize Regulatory Flexibility	

PHA Name: <b>OSHKOSH HOUSING AUTHORITY</b>		Grant Type and Number Capital Fund Program Grant No: <b>WI39 P113 501/03</b>		Federal FY of Grant: <b>2003</b>	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement #1 <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements Soft Costs	4,000	4,000	00	
	Management Improvements Hard Costs	8,000	8,000	00	
4	1410 Administration	32,000	32,000	32000	
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	18,000	8,000	00	
8	1440 Site Acquisition	100,000	00	00	
9	1450 Site Improvement				
10	1460 Dwelling Structures	16,999	218,000	00	
11	1465.1 Dwelling Equipment—Nonexpendable	106,000	112,000	00	
12	1470 Nondwelling Structures	66,000	00	00	
13	1475 Nondwelling Equipment	27,000			
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1502 Contingency	7,373	3372	00	
	Amount of Annual Grant: (sum of lines.....)	385,372	385,372	32,000	00
	Budgeted Costs Related to LBP Activities				
	Budgeted Costs Related to Section 504 compliance				
	Budgeted Costs Related to Security –Soft Costs				
	Budgeted Costs related to Security-- Hard Costs				
	Budgeted Costs Related to Energy Conservation Measures				
	Collateralization Expenses or Debt Service				

<b>Annual Statement/Performance and Evaluation Report</b>								
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)								
Part II: Supporting Pages								
PHA Name: <b>OSHKOSH HOUSING AUTHORITY</b>		Grant Type and Number Capital Fund Program Grant No: <b>WI39 113 501/03</b>				Federal FY of Grant <b>2003</b>		
Development Number Name / HA-Wide	General Description of Major Work Categories	Qty.	Acct No.	Quantity	Total Estimated Cost		Total Actual Cost	Status of Work
P113 002 (MV)	New Window Screens		1460		8,000	8,000		
P113 002 (MV)	Update Fire Alarm Panel & Sys		1465.1	1	24,000	24,000		
P113 002 (MV)	Complete HVAC Upgrade		1465.1	6	64,000	64,000		
P113 002 (MV)	Elevator Update		1460	2		180,000		
P113 003 (Forty)								
P113 005 (CT)	<del>Remodel to Laundry/Lounge</del>	4	1460		40,000	00		
P113 005 (CT)	Remodel Dining Room and Upper Floor Halls	13	1460		52,000	30,000		
P113 005 (CT)	Update Fire Alarm Panel & Sys		1465.1		18,000	24,000		
P113 005 (CT)								
P113 003 (Thirty)	<del>Build Garages</del>	6	1470		66,000	00		
P113 003 (Thirty)								
	<del>New Dwelling Acq./Construction</del>		1440		16,999	00		
HA-Wide	<del>Pickup Truck Replacement</del>		1408		27,000	00		
HA-Wide	Administration		1410		32,000	32,000		
HA-Wide	Management Improvements		1408		12,000	12,000		
HA-Wide	Architectural & Engineering		1430		18,000	8,000		
	Contingency		1502		7,373	3,372		

<b>Annual Statement/Performance and Evaluation Report</b>							
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)							
Part III: Implementation Schedule							
PHA Name: <b>OSHKOSH HOUSING AUTHORITY</b>		Grant Type and Number Capital Fund Program No: <b>WI39 113 501/03</b>				Federal FY of Grant: <b>2003</b>	
Development Number Name/HA-Wide	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
HA-WIDE	03/30/2005	02/13/2006		03/30/2007	02/13/2008		

**Annual Statement/Performance and Evaluation Report**

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

PHA Name: **OSHKOSH HOUSING AUTHORITY**

Grant Type and Number

Capital Fund Program Grant No: **WI39 P113 502/03**

Federal FY of Grant:

**2003**

Original Annual Statement  Reserve for Disasters/ Emergencies  Revised Annual Statement #1

Performance and Evaluation Report for Period Ending:  Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements Soft Costs				
	Management Improvements Hard Costs				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement		76,800		
10	1460 Dwelling Structures	76,000			
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1502 Contingency	803	3		
	Amount of Annual Grant: (sum of lines.....)		76,803		
	Budgeted Costs Related to LBP Activities		00		
	Budgeted Costs Related to Section 504 compliance		12,000		
	Budgeted Costs Related to Security –Soft Costs		00		
	Budgeted Costs related to Security-- Hard Costs		00		
	Budgeted Costs Related to Energy Conservation Measures		00		
	Collateralization Expenses or Debt Service		00		



## Annual Statement/Performance and Evaluation Report

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

### Part II: Supporting Pages

PHA Name: <b>OSHKOSH HOUSING AUTHORITY</b>		Grant Type and Number Capital Fund Program Grant No: <b>WI39 P113 501/04</b>		Federal FY of Grant: <b>2004</b>	
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements Soft Costs	4,000			
	Management Improvements Hard Costs	8,000			
4	1410 Administration	32,000			
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	18,000			
8	1440 Site Acquisition	100,000			
9	1450 Site Improvement				
10	1460 Dwelling Structures	100,000			
11	1465.1 Dwelling Equipment—Nonexpendable	106,000			
12	1470 Nondwelling Structures	66,000			
13	1475 Nondwelling Equipment	27,000			
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1502 Contingency	7,373			
	Amount of Annual Grant: (sum of lines.....)	468,373			
	Budgeted Costs Related to LBP Activities				
	Budgeted Costs Related to Section 504 compliance				
	Budgeted Costs Related to Security –Soft Costs				
	Budgeted Costs related to Security-- Hard Costs				
	Budgeted Costs 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 II: Supporting Pages**

PHA Name: <b>OSHKOSH HOUSING AUTHORITY</b>		Grant Type and Number Capital Fund Program Grant No: <b>WI39 113 501/04</b>				Federal FY of Grant <b>2004</b>		
Development Number Name / HA-Wide	General Description of Major Work Categories	Qty.	Acct No.	Quantity	Total Estimated Cost		Total Actual Cost	Status of Work
P113 002 (MV)	EPHS Stabilization/Tuckpointing	1			20,000			
P113 002 (MV)	New Dining Room Furniture				15,000			
P113 002 (MV)	Build TV Lounge, Exercise Room and Computer Lab				12,000			
P113 002 (MV)	Renovate Common Areas				10,000			
P113 002 (MV)	New Window Treatments	312			15,400			
P113 003 (Forty)	Replace Kitchens	20			60,000			
P113 005 (CT)	Relocate Laundry w/ Lounges	4	1460		32,000			
P113 005 (CT)	Create South Visitors Enrty	1	1460		120,000			
P113 005 (CT)	Tuckpointing				26,000			
P113 005 (CT)	New Window Treatments	220			22,000			
P113 003 (Thirty)	Build Garages	6	1470		66,000			
	New Dwelling Acq./Construction	1	1499		1,000			
HA-Wide	Administration		1410		32,000			
HA-Wide	Management Improvements		1470		12,000			
HA-Wide	Architectural & Engineering		1430		18,000			
	Contingency		1502		775			

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

PHA Name: <b>OSHKOSH HOUSING AUTHORITY</b>		Grant Type and Number Capital Fund Program No: <b>WI39 113 501/04</b>				Federal FY of Grant: <b>2004</b>		
Development Number Name/HA-Wide	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates	
	Original	Revised	Actual	Original	Revised	Actual		
HA-WIDE	03/30/2007			03/30/2007				

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

Activities for Year : FFY Grant:2004 PHA FY:2004			Activities for Year: FFY Grant:2005 PHA FY:2005		
Development Number / Name HA-Wide	Work Category	Estimated Cost	Development Number / Name HA-Wide	Work Category	Estimated Cost
P113 002 (MV)	Replace Toilets	40,000	P113 002 (MV)	Parking Improvements	72,000
P113 002 (MV)	Bath Accessibility Conversions (3)	7,500			
P113 003 (Forty)			P113 003 (Forty)	Renovate Exteriors	40,000
P113 005 (CT)	Bath Accessibility Conversions (13)	32,500	P113 003 (CT)		
P113 003 (Thirty)	Build Garages (6)	66,000	P113 003 (Thirty)	Build Garages (9)	96,000
P113 003 (Thirty)	Replace Roofs (10)	60,000	P113 003 (Thirty)	Replace Roofs (5)	30,000
P113 003 (Thirty)	Replace Furnaces	48,000			
HA-Wide	New Dwelling Acq./Construction	120,000	HA-Wide	New Dwelling Acq./Construction	150,000
HA-Wide	Landscaping	8,000	HA-Wide	Landscaping	12,000
HA-Wide	Management Improvements	40,000	HA-Wide	Management Improvements	20,000
HA-Wide	Architectural & Eng	12,000	HA-Wide	Architectural & Eng	8,000
HA-Wide	Administration	30,000	HA-Wide	Administration	32,000
HA-Wide	Contingency	4,373	HA-Wide	Contingency	8,373
<b>TOTAL</b>		468,373	<b>TOTAL</b>		468,373

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

Activities for Year 1	Activities for Year FFY Grant:2005 PHA FYE: 06/30/2006			Activities for Year: FFY Grant:2006 PHA FYE: 06/30/2007		
	Development Number / Name HA-Wide	Work Category	Estimated Cost	Development Number / Name / HA-Wide	Work Category	Estimated Cost
	P113 002 (MV)	Refurbish Exterior	62,000			
	P113 002 (MV)	Kitchen Cabinetry	180,000	P113 002 (MV)	Residential Storage Area	48,000
	P113 002 (MV)	Emergency Generator	28,000			
	P113 003 (Forty)			P113 003 (Forty)	Upgrade Laundry Facilities	24,000
	P113 003 (Forty)			P113 003 (Forty)		
	P113 005 (CT)	Tuckpointing	24,000			
	P113 005 (CT)	Closet Door Replacements	32,000			
	P113 005 (CT)	Emergency Generator	36,000			
	P113 005 (Thirty)	Renovate Units	6,000	P113 005 (Thirty)	Renovate Units (3)	20,000
	P113 005 (Thirty)			P113 003 (Thirty)	Upgrade Laundry Facilities	18,000
				HA-Wide	Pickup Truck Replacement	28,000
	HA-Wide	Smoke Detector Replacement	7,800	HA-Wide	New Construction	250,000
	HA-Wide	Landscaping	12,000	HA-Wide	Landscaping	12,000
	HA-Wide	Management Improvements	20,000	HA-Wide	Management Improvements	12,000
	HA-Wide	Architectural & Eng	22,000	HA-Wide	Architectural & Eng	15,000
	HA-Wide	Administration	30,000	HA-Wide	Administration	32,000
	HA-Wide	Contingency	8,573	HA-Wide	Contingency	9,373
	<b>TOTAL</b>		468,373			468,373