

PHA Plans

Streamlined 5-Year/Annual Version

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

OMB No. 2577-0226
(exp 05/31/2006)

This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937 that introduced 5-year and annual PHA Plans. The full PHA plan provides a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission and strategies for serving the needs of low-income and very low-income families. This form allows eligible PHAs to make a streamlined annual Plan submission to HUD consistent with HUD's efforts to provide regulatory relief to certain PHAs. Public reporting burden for this information collection is estimated to average 11.7 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

Privacy Act Notice. The United States Department of Housing and Urban Development, Federal Housing Administration, is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Information in PHA plans is publicly available.

Streamlined 5-Year Plan for Fiscal Years 2005 - 2009

Streamlined Annual Plan for Fiscal Year 2005

NOTE: This PHA Plan template (HUD-50075-SA) is to be completed in accordance with instructions contained in previous Notices PIH 99-33 (HA), 99-51 (HA), 2000-22 (HA), 2000-36 (HA), 2000-43 (HA), 2001-4 (HA), 2001-26 (HA), 2003-7 (HA), and any related notices HUD may subsequently issue. Full reporting for each component listed in the streamlined Annual Plan submitted with the 5-year plan is required.

Streamlined Five-Year PHA Plan Agency Identification

PHA Name: Ocala Housing Authority

PHA Number: FL032

PHA Fiscal Year Beginning: 10/2005

PHA Programs Administered:

Public Housing and Section 8

Section 8 Only

Public Housing Only

Number of public housing units: 185

Number of S8 units:

Number of public housing units:

Number of S8 units: 1,146

PHA Consortia: (check box if submitting a joint PHA Plan and complete table)

Participating PHAs	PHA Code	Program(s) Included in the Consortium	Programs Not in the Consortium	# of Units Each Program
Participating PHA 1:				
Participating PHA 2:				
Participating PHA 3:				

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 and attachments (if any) 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)

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

Streamlined Five-Year PHA Plan

PHA FISCAL YEARS 2005 - 2009

[24 CFR Part 903.12]

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.

X The PHA's mission is: The Ocala Housing Authority is committed to providing and expanding safe, decent and sanitary housing in the most cost efficient manner, to the residents of Marion County; and to provide economic opportunities and housing free from illegal discrimination; and to build better neighborhoods by providing comprehensive opportunities for our Residents through partnerships and networking within our community.

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.

- X 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
 - X Other 1. Maintain a list of affordable, decent & sanitary houses available

- X PHA Goal: Improve the quality of assisted housing
Objectives:
- Improve public housing management: (PHAS score)
 - Improve voucher management: (SEMAP score)
 - X Increase customer satisfaction: survey residents at least annually to determine concerns, satisfaction and ideas.
 - 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:
 - X Provide replacement vouchers: Mod-Rehab units sold to private owner contracts not renewed.
 - Other: (list below)

- X PHA Goal: Increase assisted housing choices
Objectives:
- Provide voucher mobility counseling:
 - X Conduct outreach efforts to potential voucher landlords
 - X Increase voucher payment standards
 - Implement voucher homeownership program:
 - X Implement public housing or other homeownership programs: complete affordable single family subdivision – Paradise Trails; 18 newly constructed homes = 18 new first-time homebuyer's by FY 2005 end.
 - Implement public housing site-based waiting lists:
 - Convert public housing to vouchers:
 - Other: (list below)

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

- PHA Goal: Provide an improved living environment
Objectives:
- Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
 - Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
 - Implement public housing security improvements:
 - Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
 - X Other: The OHA will continue to provide self-sufficiency programs including HUD housing counseling activities to promote economic self-sufficiency and homeownership.

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

- X PHA Goal: Promote self-sufficiency and asset development of assisted households
Objectives:
 - Increase the number and percentage of employed persons in assisted families:
 - X 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.
 - X Other: 1. Continue marketing the Ocala Housing Authority's Family Self-Sufficiency and Homebuyer's Club Programs, increasing enrollment in both programs by 10%.

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

- X PHA Goal: Ensure equal opportunity and affirmatively further fair housing
Objectives:
 - X 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)

- X PHA Goal: To expand affordable homeownership opportunities for the residents of Marion County.
 - o Market the OHA's Self-Sufficiency and Homebuyer's Club Programs increasing enrollment in both programs by 10%
 - o Assist participants of the OHA's homeownership programs to increase their credit scores by 10% annually, working towards homeownership.
 - o Complete the remaining 10 homes at the Paradise Trails affordable, single-family subdivision. Increasing the number of first-time homebuyer's in Marion County by 10.

Streamlined Annual PHA Plan PHA Fiscal Year 2005

[24 CFR Part 903.12(b)]

Table of Contents

Provide the following table of contents for the streamlined Annual Plan submitted with the Five-Year Plan, including all streamlined plan components, and additional requirements, together with the list of supporting documents available for public inspection.

A. ANNUAL STREAMLINED PHA PLAN COMPONENTS

- X 1. Housing Needs
- X 2. Financial Resources
- X 3. Policies on Eligibility, Selection and Admissions
- X 4. Rent Determination Policies
- X 5. Capital Improvements Needs
- 6. Demolition and Disposition
- 7. Homeownership
- X 8. Civil Rights Certifications (included with PHA Certifications of Compliance)
- X 9. Additional Information
 - a. PHA Progress on Meeting 5-Year Mission and Goals
 - b. Criteria for Substantial Deviations and Significant Amendments
 - c. Other Information Requested by HUD
 - i. Resident Advisory Board Membership and Consultation Process
 - ii. Resident Membership on the PHA Governing Board
 - iii. PHA Statement of Consistency with Consolidated Plan
 - iv. (Reserved)
- 10. Project-Based Voucher Program
- X 11. Supporting Documents Available for Review
- X 12. FY 2005 Capital Fund Program and Capital Fund Program Replacement Housing Factor, Annual Statement/Performance and Evaluation Report
- X 13. Capital Fund Program 5-Year Action Plan
- 14. Other (List below, providing name for each item)

B. SEPARATE HARD COPY SUBMISSIONS TO LOCAL HUD FIELD OFFICE

Form HUD-50077, PHA Certifications of Compliance with the PHA Plans and Related Regulations: Board Resolution to Accompany the Standard Annual, Standard Five-Year, and

Streamlined Five-Year/Annual Plans;

Certification by State or Local Official of PHA Plan Consistency with Consolidated Plan.

For PHAs APPLYING FOR CAPITAL FUND PROGRAM (CFP) GRANTS:

Form HUD-50070, Certification for a Drug-Free Workplace;

Form HUD-50071, Certification of Payments to Influence Federal Transactions;

Form SF-LLL & SF-LLLa, Disclosure of Lobbying Activities.

Executive Summary (optional)

[903.7(r)]. If desired, provide a brief overview of the contents of the streamlined 5-Year/Annual Plan.

1. Statement of Housing Needs [24 CFR Part 903.12 (b), 903.7(a)]

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

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

Housing Needs of Families on the PHA’s Waiting Lists			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	732		
Extremely low income <=30% AMI	524	72	
Very low income (>30% but <=50% AMI)	131	18	
Low income (>50% but <80% AMI)	77	11	
Families with children	477	65	
Elderly families	42	6	
Families with Disabilities	150	20	
Race/ethnicity Black	393	54	
Race/ethnicity White	235	32	
Race/ethnicity Hispanic	97	13	
Race/ethnicity other	7	1	
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			

Housing Needs of Families on the PHA's Waiting Lists			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)? 21			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?			
X No <input type="checkbox"/> Yes			

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

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

Housing Needs of Families on the PHA's Waiting Lists			
Waiting list type: (select one)			
Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	1081		
Extremely low income <=30% AMI	733	68%	
Very low income (>30% but <=50% AMI)	256	24%	
Low income (>50% but <80% AMI)	92	8%	
Families with children	885	82%	
Elderly families	48	4%	
Families with Disabilities	148	14%	
Race/ethnicity Black	111	10%	
Race/ethnicity White	404	37%	
Race/ethnicity Hispanic	563	52%	
Race/ethnicity other	3	>1%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	357	33%	
2 BR	392	36%	
3 BR	314	29%	
4 BR	18	2%	
5 BR	NA	NA	
5+ BR	NA	NA	

Housing Needs of Families on the PHA's Waiting Lists

Is the waiting list closed (select one)? X 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

B. Strategy for Addressing Needs

Provide a brief description of the PHA's strategy for addressing the housing needs of families on the PHA's public housing and Section 8 waiting lists **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

The OHA is committed to reducing the shortage of affordable housing to all populations, and will make adjustments as needed to the Maintenance Work Plan in order to reduce turn over time on units in renovation and those that have been vacated. The OHA will continue to research affordable housing opportunities, and provide HUD Housing Counseling services to the residents of Marion County.

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
- X Reduce turnover time for vacated public housing units
- X Reduce time to renovate public housing units: – make adjustments to maintenance work plan as needed to improve turn over time.
- 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
- X Maintain or increase section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program
- X 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:

The OHA will continue to seek affordable housing opportunity, both rental and homeownership.

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. (28 single family homes, in a new affordable subdivision)
- 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:

The OHA will continue to market its programs to a broad range of community organizations, neighborhood groups, church's and any other avenues in which we may reach those we serve.

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) The OHA partners with Community Legal Services of Mid-Florida to educate participants on the laws governing Fair Housing as well as holding an Annual Fair Housing Summit in conjunction with the Affordable Housing Fair (now in its 6th year)

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

(2) Reasons for Selecting Strategies

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

- Funding constraints
- Staffing constraints
- Limited availability of sites for assisted housing

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

2. Statement of Financial Resources

[24 CFR Part 903.12 (b), 903.7 (c)]

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

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2005 grants)		
a) Public Housing Operating Fund	\$384,829.00	
b) Public Housing Capital Fund	\$280,945.00	
c) HOPE VI Revitalization	NA	
d) HOPE VI Demolition	NA	
e) Annual Contributions for Section 8 Tenant-Based Assistance	\$5,590,856.00	
f) Resident Opportunity and Self-Sufficiency Grants (FSS)	\$48,910.00	
g) Community Development Block Grant		
h) HOME	\$35,000.00	
Other Federal Grants (list below)		
a) FL29R032501-05	\$293,145 (estimate)	Paradise Trails
2. Prior Year Federal Grants (unobligated funds only) (list below)		
FL290P032501-04	\$129,848.48	PH Capital Improvements
FL29P032501-03	\$ 19,855.96	PH Capital Improvements
FL29P032502-03	\$ 1,500.00	PH Capital Improvements
FL29R032501-01	\$248,370	Paradise Trails

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
FL29R032501-02	\$243,090	Paradise Trails
FL29R032501-03	\$202,170	Paradise Trails
FL29R032501-04	\$234,135	Paradise Trails
3. Public Housing Dwelling Rental Income	\$189,000.00	PH Operations
4. Other income (list below)	\$132,879.00	Other
4. Non-federal sources (list below)		
FL Housing Finance Corp	\$50,000.00	Tenant Based Rental Assistance Program
Total resources	\$8,084,533.44	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.12 (b), 903.7 (b)]

A. Public Housing

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

(1) Eligibility

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

- When families are within a certain number of being offered a unit: (state number)
- When families are within a certain time of being offered a unit: (state time)
- X Other: (describe) When families are pulled from the wait list

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

- X Criminal or Drug-related activity
- X Rental history
- X Housekeeping
- Other (describe)

c. X Yes No: Does the PHA request criminal records from local law enforcement agencies for

screening purposes?

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

e. Yes X 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)

- X Community-wide list
- Sub-jurisdictional lists
- Site-based waiting lists
- Other (describe)

b. Where may interested persons apply for admission to public housing?

- X PHA main administrative office
- PHA development site management office
- Other (list below)

c. Site-Based Waiting Lists-Previous Year

1. Has the PHA operated one or more site-based waiting lists in the previous year? If yes, complete the following table; if not skip to d. NO

Site-Based Waiting Lists				
Development Information: (Name, number, location)	Date Initiated	Initial mix of Racial, Ethnic or Disability Demographics	Current mix of Racial, Ethnic or Disability Demographics since Initiation of SBWL	Percent change between initial and current mix of Racial, Ethnic, or Disability demographics

2. What is the number of site based waiting list developments to which families may apply at one time? ___

3. How many unit offers may an applicant turn down before being removed from the site-based waiting list? ____

4. Yes No: Is the PHA the subject of any pending fair housing complaint by HUD or any court order or settlement agreement? If yes, describe the order, agreement or complaint and describe how use of a site-based waiting list will not violate or be inconsistent with the order, agreement or complaint below:

d. Site-Based Waiting Lists – Coming Year

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

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

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

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

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

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

(3) Assignment

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

- One
- X Two
- Three or More

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

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

(4) Admissions Preferences

a. Income targeting:

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

b. Transfer policies:

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

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

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) For natural disasters such as; hurricane, tornado, flood, or fire
 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
- X Victims of reprisals or hate crimes
- X Other preference(s) (list below)
Displaced due to OHA purchased property

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:

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

Other preferences (select all that apply)

- 2 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
- 2 Victims of reprisals or hate crimes
- 1 Other preference(s) (list below) Displaced due to OHA purchased property

4. Relationship of preferences to income targeting requirements:

- The PHA applies preferences within income tiers
- X 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)

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

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

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

(6) Deconcentration and Income Mixing

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

b. Yes No: Do any of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments? If no, this section is complete. If yes, list these developments on the following table:

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

B. Section 8

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

(1) Eligibility

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

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

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

- c. Yes X No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- d. Yes X 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
- X Other (describe below) Prior landlords name & address

(2) Waiting List Organization

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

(3) Search Time

- a. Yes X No: Does the PHA give extensions on standard 60-day period to search for a unit?
If yes, state circumstances below:

(4) Admissions Preferences

- a. Income targeting

Yes X 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. X 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

- X Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- X Victims of domestic violence
- X Substandard housing
- X Homelessness
- X 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
- X Other preference(s) (list below) Those unable to work because of age or disability & families who's annual income is at/or below 30% of area median income.

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

1 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in your jurisdiction

- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)

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

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

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

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

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

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

(5) Special Purpose Section 8 Assistance Programs

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

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

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

- Through published notices
- Other (list below) Letters to qualified persons/families

4. PHA Rent Determination Policies

[24 CFR Part 903.12(b), 903.7(d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one of the following two)

- X 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))
- 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
- X \$26-\$50

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

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

Federal Hardship Policy

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

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

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

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

- For the earned income of a previously unemployed household member
- For increases in earned income
- Fixed amount (other than general rent-setting policy)
If yes, state amount/s and circumstances below:

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

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

e. Ceiling rents

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

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

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

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

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

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

f. Rent re-determinations:

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

- Never
- At family option
- X Any time the family experiences an income increase
- Any time a family experiences an income increase above a threshold amount or percentage: (if

selected, specify threshold) _____

Other (list below)

g. Yes X 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

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

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

B. Section 8 Tenant-Based Assistance

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

(1) Payment Standards

Describe the voucher payment standards and policies.

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

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

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

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

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

- FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area
 Reflects market or submarket

- To increase housing options for families
- Other (list below)

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

- Annually
- X Other (list below) As needed, based on funding for program

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

- X 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
- X \$1-\$25
- \$26-\$50

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

5. Capital Improvement Needs

[24 CFR Part 903.12(b), 903.7 (g)]

Exemptions from Component 5: Section 8 only PHAs are not required to complete this component and may skip to Component 6.

A. Capital Fund Activities

Exemptions from sub-component 5A: PHAs that will not participate in the Capital Fund Program may skip to component 5B. All other PHAs must complete 5A as instructed.

(1) Capital Fund Program

a. X Yes No Does the PHA plan to participate in the Capital Fund Program in the upcoming year? If yes, complete items 12 and 13 of this template (Capital Fund Program tables). If no, skip to B.

b. Yes X No: Does the PHA propose to use any portion of its CFP funds to repay debt incurred to finance capital improvements? If so, the PHA must identify in its annual and 5-year capital plans the development(s) where such improvements will be made and show both how the proceeds of the financing will be used and

the amount of the annual payments required to service the debt. (Note that separate HUD approval is required for such financing activities.).

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

Applicability of sub-component 5B: All PHAs administering public housing. Identify any approved HOPE VI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

(1) Hope VI Revitalization

- a. Yes X No: Has the PHA received a HOPE VI revitalization grant? (if no, skip to next component; if yes, provide responses to questions on chart below for each grant, copying and completing as many times as necessary)
- b. Status of HOPE VI revitalization grant (complete one set of questions for each grant)
Development name:
Development (project) number:
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
- c. Yes X No: Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year? If yes, list development name/s below:
- d. Yes X No: 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:
- e. Yes X No: 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:

6. Demolition and Disposition

[24 CFR Part 903.12(b), 903.7 (h)]

Applicability of component 6: Section 8 only PHAs are not required to complete this section.

- a. Yes X No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 or 24 (Hope VI) of the U.S. Housing Act of 1937 (42 U.S.C. 1437p) or Section 202/Section 33 (Mandatory Conversion) in the plan Fiscal

Year? (If “No”, skip to component 7; if “yes”, complete one activity description for each development on the following chart.)

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

7. Section 8 Tenant Based Assistance--Section 8(y) Homeownership Program

[24 CFR Part 903.12(b), 903.7(k)(1)(i)]

(1) Yes X 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 the next component; if “yes”, complete each program description below (copy and complete questions for each program identified.)

(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, what is the maximum number of participants this fiscal year? ___

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:

c. What actions will the PHA undertake to implement the program this year (list)?

(3) Capacity of the PHA to Administer a Section 8 Homeownership Program

The PHA has demonstrated its capacity to administer the program by (select all that apply):

- a. Establishing a minimum homeowner downpayment requirement of at least 3 percent of purchase price and requiring that at least 1 percent of the purchase price comes from the family's resources.
- b. Requiring that financing for purchase of a home under its Section 8 homeownership will be provided, insured or guaranteed by the state or Federal government; comply with secondary mortgage market underwriting requirements; or comply with generally accepted private sector underwriting standards.
- c. Partnering with a qualified agency or agencies to administer the program (list name(s) and years of experience below).
- d. Demonstrating that it has other relevant experience (list experience below).

8. Civil Rights Certifications

[24 CFR Part 903.12 (b), 903.7 (o)]

Civil rights certifications are included in the *PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations: Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans*, which is submitted to the Field Office in hard copy—see Table of Contents.

9. Additional Information

[24 CFR Part 903.12 (b), 903.7 (r)]

A. PHA Progress in Meeting the Mission and Goals Described in the 5-Year Plan

(Provide a statement of the PHA's progress against the goals and objectives established in the previous 5-Year Plan for the period FY 2000 - 2004)

The Ocala Housing Authority completed the majority of the goals set forth in the prior 5-year agency plan; central heat and air were installed in all 185 public housing units, gutters were installed, community rooms were updated and renovated, repairs were made to parking lots and sidewalks, the family communities received playgrounds for the children, and window treatments were installed in all 185 units. The OHA continues to work diligently on those goals still in progress. The need for affordable homeownership opportunities prompted the OHA to develop a strategy to utilize the former site of a dilapidated public housing site (Forest View) that had been demolished in 1999, and transform this area into an affordable 28 single-family home neighborhood. The original plan was to have these homes completed by FY 2003, but due to some major setbacks on the first piece of property failing to meet HUD's standards for a new homeownership development, everything had to be switched over to the Forest View property. The cost of providing affordable homeownership opportunities has risen considerably, but the OHA continues to

work hard to see Paradise Trails Subdivision to fruition. Site work has begun and the OHA will see 18 of the planned 28 homes completed creating 18 new first-time homebuyer's.

B. Criteria for Substantial Deviations and Significant Amendments

(1) Amendment and Deviation Definitions

24 CFR Part 903.7(r)

PHAs are required to define and adopt their own standards of substantial deviation from the 5-year Plan and Significant Amendment to the Annual Plan. The definition of significant amendment is important because it defines when the PHA will subject a change to the policies or activities described in the Annual Plan to full public hearing and HUD review before implementation.

a. Substantial Deviation from the 5-Year Plan

A substantial deviation from the 5-year plan that would require a public hearing and HUD review would be the addition or removal of any programs the OHA offers. For example the Section 8 Homeownership program, the OHA notified HUD of its intentions to not pursue this program at this time. Had the plan been in place and then the OHA decided to discontinue, this would have been a major deviation from the 5-year plan.

b. Significant Amendment or Modification to the Annual Plan

When the OHA will make a significant amendment or modification to the Annual Plan notices will be sent to the residents and discussion will take place at the resident council meetings. For example work items not stated in capital funding tables, but become necessary will be discussed prior to any modifications being made.

C. Other Information

[24 CFR Part 903.13, 903.15]

(1) Resident Advisory Board Recommendations

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

If yes, provide the comments below:

b. In what manner did the PHA address those comments? (select all that apply)

Considered comments, but determined that no changes to the PHA Plan were necessary.

The PHA changed portions of the PHA Plan in response to comments
List changes below:

Other: (list below)

(2) Resident Membership on PHA Governing Board

The governing board of each PHA is required to have at least one member who is directly assisted by the

PHA, unless the PHA meets certain exemption criteria. Regulations governing the resident board member are found at 24 CFR Part 964, Subpart E.

a. Does the PHA governing board include at least one member who is directly assisted by the PHA this year?

X Yes No:

If yes, complete the following:

Name of Resident Member of the PHA Governing Board:

Reba Overstreet

Method of Selection:

X Appointment **The term of appointment is (include the date term expires): 4 years and Ms. Overstreet's term expires June 2008**

Election by Residents (if checked, complete next section--Description of Resident Election Process)

Description of Resident Election Process

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
- X Other: (describe) The Mayor of the City of Ocala appoints a resident from a slate of interested residents, as per Florida Statute 421.05

Eligible candidates: (select one)

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

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
- X Other (list) The Mayor appoints from a slate of interested residents.

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

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

Date of next term expiration of a governing board member: **June 2006**

Name and title of appointing official(s) for governing board (indicate appointing official for the next available position): **The Mayor of the City of Ocala**

(3) PHA Statement of Consistency with the Consolidated Plan

[24 CFR Part 903.15]

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

Consolidated Plan jurisdiction: The City of Ocala, Ocala Florida

a. 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):

- X The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.
- X The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- X The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- X Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
 - o Increase affordable housing opportunities both rental and homeownership: The OHA has purchased over 282 units, completed rehabilitation on those units and they are now 100% leased up, as well as completed phases II & III of Magnolia Walk, a elderly community, adding an additional 144 units. The OHA is moving forward on Paradise Trails (site work has started) with the first 18 (of28) homes slated to be completed and sold by December 30, 2005.
- Other: (list below)

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

- o Both SHIP and CDBG funds have been set aside for the future homebuyer's at Paradise Trails as well as the new American Dream Down Payment Initiative (ADDI) funds.

(4) (Reserved)

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

10. Project-Based Voucher Program

- a. Yes No: Does the PHA plan to “project-base” any tenant-based Section 8 vouchers in the coming year? If yes, answer the following questions.
- b. Yes No: Are there circumstances indicating that the project basing of the units, rather than tenant-basing of the same amount of assistance is an appropriate option?

If yes, check which circumstances apply:

- Low utilization rate for vouchers due to lack of suitable rental units
- Access to neighborhoods outside of high poverty areas
- Other (describe below:)

- c. Indicate the number of units and general location of units (e.g. eligible census tracts or smaller areas within eligible census tracts):

11. List of Supporting Documents Available for Review for Streamlined Five-Year/ Annual PHA Plans

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
X	<i>PHA Certifications of Compliance with the PHA Plans and Related Regulations and Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans.</i>	Standard 5 Year and Annual Plans; streamlined 5 Year Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan.	5 Year Plans
X	Fair Housing Documentation Supporting Fair Housing Certifications: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans
X	Housing Needs Statement of the Consolidated Plan for the jurisdiction(s) in which the PHA is located and any additional backup data to support statement of housing needs for families on the PHA’s public housing and Section 8 tenant-based waiting lists.	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan:

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
		Financial Resources
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O/ACOP), which includes the Tenant Selection and Assignment Plan [TSAP] and the Site-Based Waiting List Procedure.	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Any policy governing occupancy of Police Officers and Over-Income Tenants in Public Housing. <input type="checkbox"/> Check here if included in the public housing A&O Policy.	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the method for setting public housing flat rents. X Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development. X Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies (if included in plan, not necessary as a supporting document) and written analysis of Section 8 payment standard policies. X Check here if included in Section 8 Administrative Plan.	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation).	Annual Plan: Operations and Maintenance
X	Results of latest Public Housing Assessment System (PHAS) Assessment (or other applicable assessment).	Annual Plan: Management and Operations
X	Follow-up Plan to Results of the PHAS Resident Satisfaction Survey (if necessary)	Annual Plan: Operations and Maintenance and Community Service & Self-Sufficiency
X	Results of latest Section 8 Management Assessment System (SEMAP)	Annual Plan: Management and Operations
	Any policies governing any Section 8 special housing types <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Operations and Maintenance
	Consortium agreement(s).	Annual Plan: Agency Identification and Operations/ Management
X	Public housing grievance procedures X Check here if included in the public housing A & O Policy.	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures. <input type="checkbox"/> Check here if included in Section 8 Administrative Plan.	Annual Plan: Grievance Procedures
X	The Capital Fund/Comprehensive Grant Program Annual Statement /Performance and Evaluation Report for any active grant year.	Annual Plan: Capital Needs
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grants.	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans, or any other approved proposal for development of public housing.	Annual Plan: Capital Needs
X	Self-evaluation, Needs Assessment and Transition Plan required by regulations implementing Section 504 of the Rehabilitation Act and the Americans with	Annual Plan: Capital Needs

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
	Disabilities Act. See PIH Notice 99-52 (HA).	
X	Approved or submitted applications for demolition and/or disposition of public housing.	Annual Plan: Demolition and Disposition
	Approved or submitted applications for designation of public housing (Designated Housing Plans).	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act, Section 22 of the US Housing Act of 1937, or Section 33 of the US Housing Act of 1937.	Annual Plan: Conversion of Public Housing
	Documentation for required Initial Assessment and any additional information required by HUD for Voluntary Conversion.	Annual Plan: Voluntary Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans.	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program (Section _____ of the Section 8 Administrative Plan)	Annual Plan: Homeownership
X	Public Housing Community Service Policy/Programs X Check here if included in Public Housing A & O Policy	Annual Plan: Community Service & Self-Sufficiency
X	Cooperative agreement between the PHA and the TANF agency and between the PHA and local employment and training service agencies.	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan(s) for public housing and/or Section 8.	Annual Plan: Community Service & Self-Sufficiency
X	Section 3 documentation required by 24 CFR Part 135, Subpart E for public housing.	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports for public housing.	Annual Plan: Community Service & Self-Sufficiency
X	Policy on Ownership of Pets in Public Housing Family Developments (as required by regulation at 24 CFR Part 960, Subpart G). X Check here if included in the public housing A & O Policy.	Pet Policy
X	The results of the most recent fiscal year audit of the PHA conducted under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings.	Annual Plan: Annual Audit
	Consortium agreement(s), if a consortium administers PHA programs.	Joint PHA Plan for Consortia
	Consortia Joint PHA Plans ONLY: Certification that consortium agreement is in compliance with 24 CFR Part 943 pursuant to an opinion of counsel on file and available for inspection	Joint PHA Plan for Consortia
	Other supporting documents (optional). List individually.	(Specify as needed)

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name:		Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No:			Federal FY of Grant:
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line	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				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures				
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)				
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name:		Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No:			Federal FY of Grant:
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
26	Amount of line 21 Related to Energy Conservation Measures				

Annual Statement/Performance and Evaluation Report								
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)								
Part II: Supporting Pages								
PHA Name:		Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No:			Federal FY of Grant:			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan						
Part II: Supporting Pages—Work Activities						
Activities for Year 1	Activities for Year : ____ FFY Grant: PHA FY:			Activities for Year: ____ FFY Grant: PHA FY:		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See						
Annual						
Statement						
Total CFP Estimated Cost			\$			\$

8. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan					
Part I: Summary					
PHA Name Ocala Housing Authority				<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:	
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 5 FFY Grant: 2009 PHA FY: 2010	Work Statement for Year 2 FFY Grant: 2006 PHA FY: 2007	Work Statement for Year 3 FFY Grant: 2007 PHA FY: 2008	Work Statement for Year 4 FFY Grant: 2008 PHA FY: 2009
FL032-PHA Wide	Annual Statement	\$266,500.00	\$295,250.00	\$281,250.00	\$375,250.00
FL032-02		\$ 96,250.00	\$ 25,817.00	\$ 0.00	\$ 0.00
FL032-03		\$	\$ 23,028.00	\$ 0.00	\$ 0.00
FL032-04		\$ 25,000.00	\$ 19,155.00	\$ 40,000.00	\$ 25,000.00
FL032-08		\$ 50,000.00	\$ 1,000.00	\$ 35,000.00	\$ 0.00
CFP Funds Listed for 5-year planning		\$437,750.00	\$364,250.00	\$356,250.00	\$400,250.00
Replacement Housing Factor Funds		\$200,000.00	\$200,000.00	\$200,000.00	\$200,000.00

8. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan						
Part II: Supporting Pages—Work Activities						
Activities for Year 1	Activities for Year : <u>2009</u> FFY Grant: PHA FY: 2010			Activities for Year: <u>2006</u> FFY Grant: PHA FY: 2007		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	PHA Wide	Operating Subsidy	\$50,000.00	PHA Wide	Operating Subsidy	\$50,000.00
Annual	PHA Wide	Management Improvement (Staff Training, MIS & Consultants)	\$20,000.00	PHA Wide	Management Improvement (Staff Training, MIS & Consultants)	\$20,000.00
Statement	PHA Wide	Administration	\$35,000.00	PHA Wide	Administration	\$35,000.00
	PHA Wide	A & E Fees (UPCS Inspection, Energy Audit, Utility Allowance)	\$ 4,000.00	PHA Wide	A & E Fees (UPCS Inspection)	\$ 4,000.00
	PHA Wide	Landscaping & Tree Removal	\$ 2500.00	PHA Wide	Landscaping & Tree Removal	\$5,000.00
	PHA Wide	Sidewalk – Replacement, Repair & Installation	\$20,000.00	PHA Wide	Sidewalk – Replacement, Repair & Installation	\$15,000.00
	PHA Wide	Resurface Parking Areas and Stripping	\$40,000.00	PHA Wide	Resurface Parking Areas and Stripping	\$25,000.00
	PHA Wide	Security Lighting	\$	PHA Wide	Security Lighting	
	PHA Wide	HVAC Replacement & Repairs	\$	PHA Wide	HVAC Replacement & Repairs	\$46,250.00

8. Capital Fund Program Five-Year Action Plan

	PHA Wide	Window Replacement		PHA Wide	Window Replacement	
	FL032-02	Roof Replacement	\$50,000.00	FL032-02	Roof Replacement	
	PHA Wide	Vacancy Reduction (Kitchen Cabinets & VCT Installation)	\$	PHA Wide	Vacancy Reduction (Kitchen Cabinets & VCT Installation)	\$10,000.00
	PHA Wide	Install Water Hose Bibs		PHA Wide	Install Water Hose Bibs	\$25,000.00
	FL032-02 FL032-03 FL032-04	Install Water Meters	25,000.00	FL032-02 FL032-03 FL032-04	Install Water Meters	\$50,000.00
	FL032-02	Install Siding on Storage Shed	\$	FL032-02	Install Siding on Storage Shed	
	FL032-02	Replace Front Entry Door		FL032-02	Replace Front Entry Door	\$14,000.00
	PHA Wide	Replace Kitchen Appliances	\$	PHA Wide	Replace Kitchen Appliances	\$10,000.00
	FL032-04	Build Pavilion		FL032-04	Build Pavilion	
	FL032-02 FL032-03 FL032-04	Remodel CC Restrooms	\$	FL032-02 FL032-03 FL032-04	Remodel CC Restrooms	
	PHA Wide	Outdoor Furniture	\$	PHA Wide	Outdoor Furniture	\$5,000.00
	PHA Wide	Replace Screen Doors	\$30000.00	PHA Wide	Replace Screen Doors	
	PHA Eide	Security Window Screens	\$65000.00		Security Window Screens	

8. Capital Fund Program Five-Year Action Plan

	FL032-02 FL032-03 FL032-04	Replace Storage Doors & Frames	\$46,250.00		Replace Storage Doors & Frames	
	FL032-08	Upgrade Elevator	50,000.00	FL032-08	Upgrade Elevator	
	FL032-04	Install Privacy/Security Fence		FL032-04	Install Privacy/Security Fence	
	PHA Wide	Install Ceiling Fans		PHA Wide	Install Ceiling Fans	\$50,000.00
	FL032-03	Install Speed Tables	\$	FL032-03	Install Speed Tables	
	PHA Wide	Exterior Painting	\$	PHA Wide	Exterior Painting	
	Total CFP Estimated Cost		\$437,750.00			\$364,250.00

8. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan					
Part II: Supporting Pages—Work Activities					
Activities for Year <u>2007</u> FFY Grant: PHA FY: 2008			Activities for Year: <u>2008</u> FFY Grant: PHA FY: 2009		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
PHA Wide	Operating Subsidy	\$50,000.00	PHA Wide	Operating Subsidy	\$50,000.00
PHA Wide	Management Improvement (Staff Training, MIS & Consultants)	\$20,000.00	PHA Wide	Management Improvement (Staff Training, MIS & Consultants)	\$20,000.00
PHA Wide	Administration	\$35,000.00	PHA Wide	Administration	\$35,000.00
PHA Wide	A & E Fees (UPCS Inspection & Energy Audit)	\$ 10,000.00	PHA Wide	A & E Fees (UPCS Inspection)	\$ 4,000.00
PHA Wide	Landscaping & Tree Removal		PHA Wide	Landscaping & Tree Removal	
PHA Wide	Sidewalk – Replacement, Repair & Installation		PHA Wide	Sidewalk – Replacement, Repair & Installation	

8. Capital Fund Program Five-Year Action Plan

PHA Wide	Resurface Parking Areas and Stripping		PHA Wide	Resurface Parking Areas and Stripping	
PHA Wide	Security Lighting		PHA Wide	Security Lighting	
PHA Wide	HVAC Replacement & Repairs	\$46,250.00	PHA Wide	HVAC Replacement & Repairs	\$46,250.00
PHA Wide	Window Replacement	\$100,000.00	PHA Wide	Window Replacement	\$100,000.00
FL032-02	Roof Replacement		FL032-02	Roof Replacement	
PHA Wide	Vacancy Reduction (Kitchen Cabinets & VCT Installation)	\$10,000.00	PHA Wide	Vacancy Reduction (Kitchen Cabinets & VCT Installation)	\$10,000.00
PHA Wide	Install Water Hose Bibs		PHA Wide	Install Water Hose Bibs	
FL032-02 FL032-03 FL032-04	Install Water Meters		FL032-02 FL032-03 FL032-04	Install Water Meters	
FL032-02	Install Siding on Storage Shed		FL032-02	Install Siding on Storage Shed	
FL032-02	Replace Front Entry Door		FL032-02	Replace Front Entry Door	
PHA Wide	Replace Kitchen Appliances	\$10,000.00	PHA Wide	Replace Kitchen Appliances	\$10,000.00
FL032-04	Build Pavilion		FL032-04	Build Pavilion	\$25,000.00

8. Capital Fund Program Five-Year Action Plan

FL032-02 FL032-03 FL032-04	Remodel CC Restrooms		FL032-02 FL032-03 FL032-04	Remodel CC Restrooms	
FL032-08 FL032-04	Outdoor Furniture		FL032-08 FL032-04	Outdoor Furniture	
FL032-08	Upgrade Elevator	\$35,000.00	FL032-08	Upgrade Elevator	
FL032-04	Install Security/Privacy Fence	\$40,000.00	FL032-04	Install Privacy/ Security Fence	
PHA Wide	Install Ceiling Fans		PHA Wide	Install Ceiling Fans	
FL032-03	Install Speed Tables		FL032-03	Install Speed Tables	
PHA Wide	Exterior Painting		PHA Wide	Exterior Painting	\$100,000.00
Total CFP Estimated Cost		\$356,250.00			\$400,250.00

READ

This Excel book consist of 5 different working sheets.
Sheets Name: Part I, II, III, Obligation and LOCCS

Part I, II and III are the different sections of the capital improvement budget.
Part I sheet allows some information be put directly into the form. The rest of the information will come from Part II sheet. Part I sheet is protected to prevent formula corruption.
The information from Part II sheet will automatically be transferred to the appropriate account in Part I. Part III sheet is the area of the budget that contains the implementation schedule (dates).

Obligation This is the table to record the contracts and obligation activities toward the Grant.
LOCCS This is the table to record all the LOCCS request.
The data entered in Part II, Obligation and LOCCS will be recorded in Budget Part I

If you need to modify Part I, the pass word is HUD. DO NOT USE THE TABLE WITHOUT PROTECTION. Once modified, and before using the table, stablish your own pass word. If you have somebody using the table, do not disclose your own pass word. At all times, protect the formulas from accidental corruption.

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

Part I: Summary

Annual Statement/Performance and Evaluation Report Capital Fund Program

PHA Name:

OCALA HOUSING AUTHORITY

Modernization Project Number:

FL29P032501-03

FFY of Grant Approval

2003

Original Annual Statement Reserved for Disasters/Emergencies.

Revised Annual Statement/Revision No. #

Final Performance and Evaluation Report

Performance and Evaluation Report for Period Ending - March 31, 2005

LINE NO.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		ORIGINAL	REVISED	OBLIGATED	EXPENDED
1	Total none-CIAP/CGP Funds				
2	1406 Operations (Not to exceed 10% of line 19)	\$91,042.43	\$98,366.34	\$98,866.34	\$98,866.34
3	1408 Management Improvements	\$15,000.00	\$15,000.00	\$12,800.00	\$12,161.04
4	1410 Administration	\$35,500.00	\$35,500.00	\$35,000.00	\$35,000.00
5	1411 Audit				
6	1415 Liquidated damages				
7	1430 Fees and Costs	\$3,000.00	\$2,695.00	\$2,695.00	\$2,695.00
8	1440 Site Acquisition				
9	1450 Site Improvements	\$20,463.57	\$20,463.57	\$1,963.57	\$1,963.57
10	1460 Dwelling Structures	\$40,000.00	\$40,000.00	\$40,000.00	\$40,000.00
11	1465.1 Dwelling Equipment-Noneexpendable	\$14,000.00	\$14,000.00	\$14,000.00	\$14,000.00
12	1470 Nondwelling Structure				
13	1475 Nondwelling Equipment	\$35,000.00	\$27,981.09	\$27,981.09	\$27,981.09
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1495.1 Relocation Cost				
17	1498 MOD Used for Development				
18	1502 Contingency (Not to exceed 8% of line 19)				
19	Amount of Annual Grant (Sum of lines 2-18)	\$254,006.00	\$254,006.00	\$233,306.00	\$232,667.04
20	Amount of line 19 Related to LBP Activities				
21	Amount of line 19 Related to Sec 504 Comp.				
22	Amount of line 19 Related to Security	\$1,963.57	\$1,963.57		
23	Amount of line 19 Related to Energy Conservatio	\$15,000.00	\$15,000.00		

Signature of Executive Director & Date:

Gwendolyn B. Dawson

Signature of Public Housing Director/

Office of Native American Programs Administrator & Date:

Jonh G. Niesz, Public Housing Director

1 To be completed for Performance & Evaluation Report Or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report.

**Annual Statement/Performance and Evaluation Report
 Capital Fund Program and Capital Fund Program Replacement Housing Facotr (CFP/CFPRHF)
 PART II: Suporting Pages**

PHA Name: Ocala Housing Authority			Grant Type and Number Capital Fund Program: FI29PO32501-03 Capital Fund Program: Replacement Housing Factor #:			Federal FY of Grant: 2003		
Development Number	Description of Work Items	Development Account Number	Funds Approved			Funds Obligated	Funds Expended	Status of Proposed Work
			Original	Revised	Difference			
PHA Wide	OPERATIONS							
	Operating Sidsidy	1406	91,042.43	98,866.34	7,823.91	98866.34	\$98,866.34	Completed 12/04
	TOTAL	1406	91,042.43	98,866.34	7,823.91	98866.34	\$98,866.34	
PHA Wide	MANAGEMENT IMPROVEMENTS							
	Staff Training	1408	10,000.00	7,500.00	-2,500.00	6,000.00	5,537.88	On Going
	Computer Upgrades	1408	0.00	2,500.00	2,500.00	1,800.00	1,706.76	On Going
	MIS Technical Support	1408	5,000.00	5,000.00	0.00	5,000.00	4,916.40	On Going
	TOTAL	1408	15,000.00	15,000.00	0.00	12,800.00	12,161.04	
PHA Wide	ADMINISTRATION							
	MOD Cordinator Salary	1410	35,000.00	35,000.00	0.00	35,000.00	35,000.00	Completed
	Sundry	1410	500.00	0.00	-500.00			Postpone
	TOTAL	1410	35,500.00	35,000.00	-500.00	35,000.00	35,000.00	
PHA Wide	FEES AND COSTS							
	A & E Fees and Costs	1430						
	Physical Assessment	1430	3,000.00	2,695.00	-305.00	2,695.00	2,695.00	Completed 9/04
	TOTAL	1430	3,000.00	2,695.00	-305.00	2,695.00	2,695.00	

FL32-02	PAVILION OAKS							
	Site Improvement	1450						
	Parking Areas- Paving Sealant & Stripping	1450						
	Landscaping	1450						
	Fence Repair and Reconfiguration	1450	1,963.57	1,963.57	0.00	1,963.57	1,963.57	12/10/2003
	Sub-Total	1450	1,963.57	1,963.57	0.00	1,963.57	1,963.57	
	Dwelling Structure							
	Roof Replacement	1460						
	Vacancy Reduction (Kitchen Cabinets or - Floor Tile Replacement) (2)	1460	3,580.00	3,580.00	0.00	3,580.00	3,580.00	Completed 10-04
	HVAC Inspection, Repair and Replacement	1460	3,000.00	3,000.00	0.00	3,000.00	3,000.00	Completed 10-04
	Sub-Total	1460	6,580.00	6,580.00	0.00	6,580.00	6,580.00	
	Dwelling Equipment - Non Expendable	1465.1						
	Appliances (Refrigerators & Gas Ranges)(5)	1465.1	3,000.00	3,000.00	0.00	3,000.00	3,000.00	Completed 12-04
	Window Treatments(192)	1465.1						
	Sub-Total	1465.1	3,000.00	3,000.00	0.00	3,000.00	3,000.00	
	Non-Dwelling Equipment	1475						
	Vehicle (1)	1475	35,000.00	27,981.09	-7,018.91	27,981.09	27,981.09	Completed 9/04
	Sub-Total	1475	35,000.00	27,981.09	-7,018.91	27,980.09	27,981.09	
	TOTAL		46,543.57	39,524.66	-7,018.91	39,524.66	39,524.66	
FL32-03	DEER RUN							
	Site Improvements							
	Parking Areas - Paving Sealant & Stripping	1450						
	Replace & Install Dumpster Fence (PVC) (8)	1450	12,000.00	12,000.00	0.00			Preparing for Bid
	Sub-Total	1450	12,000.00	12,000.00	0.00	0.00	0.00	
	Dwelling Structure							
	Window Treatment(254)	1460						
	Window Replacement - 2800 Section (50)	1460						
	Vacancy Reduction (Kitchen Cabinets or Floor Tile Replacement (6)	1460	10,710.00	10,710.00	0.00	10,710.00	10,710.00	Completed 10-04
	HVAC Inspection, Repair and Replacement	1460	6,000.00	6,000.00	0.00	6,000.00	6,000.00	Completed 10-04
	Sub-Total	1460	16,710.00	16,710.00	0.00	16,710.00	16,710.00	
	Dwelling Equipment - Non Expendable	1465.1						
	Appliances (Refrigerators & Gas Ranges)(5)	1465.1	3,000.00	3,000.00	0.00	3,000.00	3,000.00	Completed 12-04
	Sub-Total	1465.1	3,000.00	3,000.00	0.00	3,000.00	3,000.00	
	Non Dwelling Equipment	1475						
**	Playground Equipment	1475						
	Motor Cart (1)	1475						
	Sub-Total		0.00	0.00	0.00			

TOTAL		31,710.00	31,710.00	0.00	19,710.00	19,710.00
-------	--	-----------	-----------	------	-----------	-----------

FL32-04	SHADY HOLLOW								
	Site Improvements								
	Parking Areas - paving Sealant & Stripping	1450							
	Replace & Install Dumpster Fence (PVC) (3)	1450	4,500.00	4,500.00	0.00				Preparing for Bid
	Sub-Total	1450	4,500.00	4,500.00	0.00	0.00	0.00		
	Dwelling Structure								
	Vacancy Reduction (Kitchen Cabinets or Floor Tile Replacement (5)	1460	8,925.00	8,925.00	0.00	8,925.00	8,925.00		Completed 10-04
	HVAC Inspection, Repair, and Replacement	1460	4,000.00	4,000.00	0.00	4,000.00	4,000.00		Completed 10-04
	Sub-Total	1460	12,925.00	12,925.00	0.00	12,925.00	12,925.00		
	Dwelling Structure - Non Expendable	1465.1							
	Window Treatment(219)	1465.1							
	Appliances (Refrigerators & Gas Ranges)(5)	1465.1	3,000.00	3,000.00	0.00	3,000.00	3,000.00		Completed 12-04
	Sub-Total	1465.1	3,000.00	3,000.00	0.00	3,000.00	3,000.00		
	Non Dwelling Equipment	1475							
	Moderize Community & Laundry Rooms	1475							
	Motor Carts(1)	1475	0.00	0.00	0.00				
	Sub-Total	1475	0.00	0.00	0.00				
	TOTAL		20,425.00	20,425.00	0.00	15,925.00	15,925.00		
FL32-08	PINE GARDENS								
	Site Improvements								
	Parking Areas - Paving Sealant & Stripping	1450							
	Replace Dumpster Fence (PVC) (1)	1450	2,000.00	2,000.00	0.00				Preparing for Bid
	Sub-Total	1450	2,000.00	2,000.00	0.00	0	0		
	Dwelling Structure	1460							
	Vacancy Replacement (Kitchen Cabinets & Floor Tile Replacement (1)	1460	1,785.00	1,785.00	0.00	1,785.00	1,785.00		Completed 10-04
	HVAC Inspection, Repair, and Replacement	1460	2,000.00	2,000.00	0.00	2,000.00	2,000.00		Completed 10-04
	Sub-Total	1460	3,785.00	3,785.00	0.00	3,785.00	3,785.00		
	Dwelling Equipment - Non Expendable	1465.1							
	Window Treatment (40)	1465.1							
	Appliances (Refrigerators & Gas Ranges)(8)	1465.1	5,000.00	5,000.00	0.00	5000	5000		Completed 12-04
	Sub-total	1465.1	5,000.00	5,000.00	0.00	5000	5000		
	Non Dwelling Equipment	1475							
	Replace Elevator (1)	1475							
	Sub-Total	1475	0.00	0.00	0.00				
	TOTAL		10,785.00	10,785.00	0.00	8785	8785		
	TOTAL GRANT		\$ 254,008.00	\$ 254,008.00	0.00	233,306.00	232,667.04		

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

Development Number	All Funds Obligated			All Funds Expended			Reason for revised Target Date			
	ORIGINAL	REVISED	ACTUAL	ORIGINAL	REVISED	ACTUAL				
PHA Name: Grant Type and Number Federal FY of Grant: Capital Fund Program: FL29PO32501-03 2003 Capital Fund Program: Replacement Housing Factor #:										
	(ATTACH EXPLANATION)			(ATTACH EXPLANATION)						
PHA-Wide										
#1406	9/30/2005		12/31/2004	9/30/2006		12/31/2004				
#1408	9/30/2005			9/30/2006						
#1410	9/30/2005		9/30/2004	9/30/2006		9/30/2004				
FL32-02										
#1450	9/30/2005			9/30/2006						
#1460	9/30/2005		10/31/2004	9/30/2006		10/31/2004				
#1465	9/30/2005		12/31/2004	9/30/2006		12/31/2004				
#1475	9/30/2005		9/30/2004	9/30/2006		9/30/2004				
FL32-03										
#1450	9/30/2005			9/30/2006						
#1460	9/30/2005		10/31/2004	9/30/2006		10/31/2004				
#1465	9/30/2005		12/31/2004	9/30/2006		12/31/2004				
#1475	9/30/2005		9/30/2004	9/30/2006		9/30/2004				
FL32-04										
#1450	9/30/2005			9/30/2006						
#1460	9/30/2005		10/31/2004	9/30/2006		10/31/2004				
#1465	9/30/2005		12/31/2004	9/30/2006		12/31/2004				
#1475	9/30/2005		9/30/2004	9/30/2006		9/30/2004				
FL32-08										
#1450	9/30/2005			9/30/2006						
#1460	9/30/2005		10/31/2004	9/30/2006		10/31/2004				
#1465	9/30/2005		12/31/2004	9/30/2006		12/31/2004				
#1475	9/30/2005		9/30/2004	9/30/2006		9/30/2004				

READ

This Excel book consist of 5 different working sheets.
Sheets Name: Part I, II, III, Obligation and LOCCS

Part I, II and III are the different sections of the capital improvement budget.
Part I sheet allows some information be put directly into the form. The rest of the information will come from Part II sheet. Part I sheet is protected to prevent formula corruption.
The information from Part II sheet will automatically be transferred to the appropriate account in Part I. Part III sheet is the area of the budget that contains the implementation schedule (dates).

Obligation This is the table to record the contracts and obligation activities toward the Grant.
LOCCS This is the table to record all the LOCCS request.
The data entered in Part II, Obligation and LOCCS will be recorded in Budget Part I

If you need to modify Part I, the pass word is HUD. DO NOT USE THE TABLE WITHOUT PROTECTION. Once modified, and before using the table, stablish your own pass word. If you have somebody using the table, do not disclose your own pass word. At all times, protect the formulas from accidental corruption.

Annual Statement/Performance and Evaluation Report
 Capital Fund Program **Part I: Summary**

U. S. Department of Housing
 and Urban Development

OMB Approval No. 2577-0
 (exp. 06/30/2005)

Office of Public and Indian Housing

PHA Name:

OCALA HOUSING AUTHORITY

Modernization Project Number:

FL29P032501-04

FFY of Grant Approval

2004

Original Annual Statement Reserved for Disasters/Emergencies.

Revised Annual Statement/Revision No.

Final Performance and Evaluation Report

Performance and Evaluation Report for Period Ending - March 31, 2005

LINE NO.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		ORIGINAL	REVISED (1)	OBLIGATED	EXPENDED
1	Total none-CIAP/CGP Funds				
2	1406 Operations (Not to exceed 10% of line 19)	\$65,000.00	\$151,618.00	70,000.00	\$62,980.50
3	1408 Management Improvements	\$18,750.00	\$18,750.00	\$5,700.00	\$5,430.66
4	1410 Administration	\$33,500.00	\$33,500.00	\$20,000.00	\$19,925.86
5	1411 Audit				\$0.00
6	1415 Liquidated damages				\$0.00
7	1430 Fees and Costs	\$9,000.00	\$14,000.00	\$0.00	\$0.00
8	1440 Site Acquisition				\$0.00
9	1450 Site Improvements	\$46,000.00	\$24,500.00	\$155.00	\$155.00
10	1460 Dwelling Structures	\$104,118.00	\$34,000.00	\$23,800.00	\$23,779.78
11	1465.1 Dwelling Equipment-Noneexpendable	\$14,300.00	\$14,300.00	\$8,300.00	\$3,486.00
12	1470 Nondwelling Structure				\$0.00
13	1475 Nondwelling Equipment	\$3,500.00	\$3,500.00	\$0.00	\$0.00
14	1485 Demolition				\$0.00
15	1490 Replacement Reserve				\$0.00
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Cost				\$0.00
18	1498 MOD Used for Development				\$0.00
19	1502 Contingency (Not to exceed 8% of line 20)				\$0.00
20	Amount of Annual Grant (Sum of lines 2-19)	\$294,168.00	\$294,168.00	\$127,955.00	\$115,757.80
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Sec 504 Comp.				
23	Amount of line 20 Related to Security	\$15,000.00	\$15,000.00		
24	Amount of line 20 Related to Energy Conservatio	\$70,118.00	\$70,118.00		

Signature of Executive Director & Date:

Gwendolyn B. Dawson

Signature of Public Housing Director/

Office of Native American Programs Administrator & Date:

Jonh G. Niesz, Public Housing Director

1 To be completed for Performance & Evaluation Report Or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report.

PART II: Supporting Pages

PHA Name: Ocala Housing Authority				Grant Type and Number Capital Fund Program: F129PO32501-04 Capital Fund Program: Replacement Housing Factor #:			Federal FY of Grant:		
--------------------------------------	--	--	--	--	--	--	-----------------------------	--	--

Development Number	Description of Work Items	Development Account Number	Quantity	Funds Approved			Funds Obligated	Funds Expended	Status of Proposed Work
				Original	Revised	Difference			
PHA Wide	OPERATIONS								
	Operating Sidsidy	1406		65,000.00	151,618.00	86,618.00	70000.00	\$62,980.50	On Going
	TOTAL	1406		65,000.00	151,618.00	86,618.00	70000.00	\$62,980.50	
PHA Wide	MANAGEMENT IMPROVEMENTS								
	Staff Training	1408		5,000.00	5,000.00	0.00	0.00	0.00	Scheduled
	Computer Upgrades	1408		8,750.00	8,750.00	0.00	4,200.00	4,060.43	On Going
	MIS Technical Support	1408		5,000.00	5,000.00	0.00	1,500.00	1,370.23	On Going
	TOTAL	1408		18,750.00	18,750.00	0.00	5,700.00	5,430.66	
PHA Wide	ADMINISTRATION								
	MOD Cordinator Salary	1410		33,100.00	33,100.00	0.00	20,000.00	19,925.86	On Going
	Sundry	1410		400.00	400.00	0.00			Scheduling
	TOTAL	1410		33,500.00	33,500.00	0.00	20,000.00	19,925.86	
PHA Wide	FEES AND COSTS								
	Property Inspection	1430		4,000.00	4,000.00	0.00			Scheduling
	Utility Engineer	1430		5,000.00	5,000.00	5,000.00			Scheduling
	TOTAL	1430		9,000.00	14,000.00	5,000.00	0.00	0.00	

FL32-02	PAVILION OAKS								
	Site Improvements								
	Landscaping/Tree Removal	1450		2,500.00	2,500.00	0.00			Scheduling
	Sub-Total	1450		2,500.00	2,500.00	0.00	0.00	0.00	
	Dwelling Structure								
	Window Treatments	1460	182 windows	29,130.00	0.00	-29,130.00			
	Vacancy Reduction (HVAC, Kit Cabinets, Floors, T	1460	5 units	5,000.00	5,000.00		5,000.00	5,000.00	Mar-05
	Sensor Lights	1460	78 units	10,000.00	10,000.00	0.00			Scheduling
	Sub-Total	1460		44,130.00	15,000.00	-29,130.00	5,000.00	5,000.00	
	Dwelling Equipment - Non Expendable	1465.1							
	Kitchen Appliances	1465.1	5	1,500.00	1,500.00	0.00	1,500.00	1,500.00	Dec 31 2004
	Kitchen Refrigerators	1465.1	5	1,750.00	1,750.00	0.00	1,750.00	1,750.00	Dec 31 2004
	Sub-Total	1465.1		3,250.00	3,250.00	0.00	3,250.00	3,250.00	
	Non-Dwelling Equipment	1475							
	Lap-Top Computer	1475	1	3,500.00	3,500.00	0.00			Investigating
	Sub-Total	1475		3,500.00	3,500.00	0.00	0.00	0.00	
	TOTAL			53,380.00	24,250.00	-29,130.00	8,250.00	8,250.00	
FL32-03	DEER RUN								
	Site Improvements								
	Mail Box Replacement	1450	41	1,500.00	1,500.00	0.00	0.00		Scheduling
	Lighting	1450	4 poles	15,000.00	5,000.00	-10,000.00	0.00		Scheduling
	Landscaping/Tree Removal	1450		5,000.00	5,000.00		0.00	0.00	Scheduling
	Replace Dumpster Fences	1450	8	12,000.00	6,500.00	-5,500.00			Scheduling
	Sub-Total	1450		33,500.00	18,000.00	-15,500.00	0.00	0.00	
	Dwelling Structure								
	Window Treatments Phase I	1460	370	26,956.00	0.00	-26,956.00			
	Vacancy Reduction(HVAC, cabinets, Floors & Tile)	1460	10 units	10,000.00	10,000.00	0.00	10,000.00	10,000.00	3/30/2005
	Sub-Total	1460		36,956.00	10,000.00	-26,956.00	10,000.00	10,000.00	
	Dwelling Equipment - Non Expendable	1465.1		3,000.00	3,000.00	0.00			
	Kithcen Appliances - Gas Ranges	1465.1	10	3,500.00	3,500.00	0.00	500.00	236.00	Ordering
	Kitchen Appliances - Refrigerators	1465.1	10	6,500.00	6,500.00	0.00			Ordering
	Sub-Total	1465.1					500.00	236.00	
	TOTAL			76,956.00	34,500.00	-42,456.00	10,500.00	10,236.00	

FL32-04	SHADY HOLLOW								
	Site Improvements								
	Mail Box Replaement	1450	29	1,500.00	1,500.00	0.00	155.00	155.00	Scheduling
	Install Dumpster Fence	1450	3	4,500.00	0.00	-4,500.00	0.00	0.00	Scheduling
	Sub-Total	1450		6,000.00	1,500.00	-4,500.00	155.00	155.00	
	Dwelling Structure								
	Window Treatment - Phase I	1460	64	4,672.00	0.00	-4,672.00			
	Vacancy Reduction(HVAC, cabinets, Floors & Tile)	1460	7	7,000.00	7,000.00	0.00	7,000.00	7,000.00	3/30/2005
	Sub-Total	1460		11,672.00	7,000.00	-4,672.00	7,000.00	7,000.00	
	Dwelling Structure - Non Expendable	1465.1		1,500.00	1,500.00	0.00			
	Kithcen Appliances - Gas Ranges	1465.1	5	1,750.00	1,750.00	0.00	1,500.00		Ordering
	Kitchen Appliances - Refrigerators	1465.1		3,250.00	3,250.00	0.00	1,750.00		Ordering
	Sub-Total	1465.1					3,250.00	0.00	
	TOTAL			20,922.00	11,750.00	-9,172.00	10,405.00	7,155.00	
FL32-08	PINE GARDENS								
	Site Improvements								
	Install dumpster Fence	1450	1	1,500.00	0.00	-1,500.00			Scheduling
	Resurface parking Area & Repair	1450		2,500.00	2,500.00	0.00			Planning
	Sidewalk Repair/Replacement	1450							
	Sub-Total	1450		4,000.00	2,500.00	-1,500.00	0	0	
	Dwelling Structure								
	Window Treatment	1460	60	9,360.00	0.00	-9,360.00			
	Vacancy Reduction(HVAC, cabinets, Floors & Tile)	1460	2	2,000.00	2,000.00	0.00	1,800.00	1,779.78	On Going
	Sub-Total	1460		11,360.00	2,000.00	-9,360.00	1,800.00	1,779.78	
	Dwelling Equipment - Non Expendable								
	Kithcen Appliances - Gas Ranges	1465.1	2	600.00	600.00	0.00	600		Ordering
	Kitchen Appliances - Refrigerators	1465.1	2	700.00	700.00	0.00	700		Ordering
	Sub-total	1465.1		1,300.00	1,300.00	0.00	1300	0	
	TOTAL			16,660.00	5,800.00	-10,860.00	3100	1779.78	
TOTAL GRANT				\$ 294,168.00	\$ 294,168.00	0.00	127,955.00	115,757.80	

Part III

PART III: Implementation Schedule

PHA Name: Ocala Housing Authority			Grant Type and Number Capital Fund Program: FI29PO32501-04			Federal FY of Grant: 2004			
Replacement Housing Factor #:									
Development Number	Architect/Engineer Contract Award			All Funds Obligated			All Funds Expended		
	ORIGINAL	REVISED	ACTUAL	ORIGINAL	REVISED	ACTUAL	ORIGINAL	REVISED	ACTUAL
(ATTACH EXPLANATION)			(ATTACH EXPLANATION)			(ATTACH EXPLANATION)			
PHA-Wide									
#1406				3/31/2006			9/30/2007		
#1408				3/31/2006			9/30/2007		
#1410				3/31/2006			9/30/2007		
#1430	3/31/2006								
FL32-02									
#1450				3/31/2006			9/30/2007		
#1460				3/31/2006			9/30/2007		
#1475				3/31/2006			9/30/2007		
#1465.1				3/31/2006			9/30/2007		
FL32-03									
#1450				3/31/2006			9/30/2007		
#1460				3/31/2006			9/30/2007		
#1465.1				3/31/2006			9/30/2007		
FL32-04									
#1450				3/31/2006			9/30/2007		
#1460				3/31/2006			9/30/2007		
#1465.1				3/31/2006			9/30/2007		
FL32-08									
#1450				3/31/2006			9/30/2007		
#1460				3/31/2006			9/30/2007		
#1465.1				3/31/2006			9/30/2007		

Part III

--	--	--	--	--	--	--	--

READ

This Excel book consist of 5 different working sheets.
Sheets Name: Part I, II, III, Obligation and LOCCS

Part I, II and III are the different sections of the capital improvement budget.
Part I sheet allows some information be put directly into the form. The rest of the information will come from Part II sheet. Part I sheet is protected to prevent formula corruption.
The information from Part II sheet will automatically be transferred to the appropriate account in Part I. Part III sheet is the area of the budget that contains the implementation schedule (dates).

Obligation This is the table to record the contracts and obligation activities toward the Grant.
LOCCS This is the table to record all the LOCCS request.
The data entered in Part II, Obligation and LOCCS will be recorded in Budget Part I

If you need to modify Part I, the pass word is HUD. DO NOT USE THE TABLE WITHOUT PROTECTION. Once modified, and before using the table, stablish your own pass word. If you have somebody using the table, do not disclose your own pass word. At all times, protect the formulas from accidental corruption.

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

Part I: Summary

**Annual Statement/Performance and Evaluation Report
Capital Fund Program**

PHA Name:

OCALA HOUSING AUTHORITY

Modernization Project Number:

FL29P032501-05

FFY of Grant Approval

2005

Original Annual Statement Reserved for Disasters/Emergencies.

Revised Annual Statement/Revision No. #

Final Performance and Evaluation Report

Performance and Evaluation Report for Period Ending -

LINE NO.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		ORIGINAL	REVISED	OBLIGATED	EXPENDED
1	Total none-CIAP/CGP Funds				
2	1406 Operations (Not to exceed 10% of line 19)	\$50,000.00		\$0.00	\$0.00
3	1408 Management Improvements	\$13,150.00		\$0.00	\$0.00
4	1410 Administration	\$33,750.00		\$0.00	\$0.00
5	1411 Audit				
6	1415 Liquidated damages				
7	1430 Fees and Costs	\$3,500.00		\$0.00	\$0.00
8	1440 Site Acquisition				
9	1450 Site Improvements	\$27,500.00		\$0.00	\$0.00
10	1460 Dwelling Structures	\$90,700.00		\$0.00	\$0.00
11	1465.1 Dwelling Equipment-Noneexpendable	\$62,345.00		\$0.00	\$0.00
12	1470 Nondwelling Structure				
13	1475 Nondwelling Equipment				\$0.00
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1495.1 Relocation Cost				
17	1498 MOD Used for Development				
18	1502 Contingency (Not to exceed 8% of line 19)				
19	Amount of Annual Grant (Sum of lines 2-18)	\$280,945.00	\$0.00	\$0.00	\$0.00
20	Amount of line 19 Related to LBP Activities				
21	Amount of line 19 Related to Sec 504 Comp.				
22	Amount of line 19 Related to Security	\$45,000.00			
23	Amount of line 19 Related to Energy Conservatio	\$118,070.00			

Signature of Executive Director & Date:

Gwendolyn B. Dawson

Signature of Public Housing Director/

Office of Native American Programs Administrator & Date:

Jonh G. Niesz, Public Housing Director

1 To be completed for Performance & Evaluation Report Or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report.

**Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Facotr (CFP/CFPRHF)**

PART II: Suporting Pages

PHA Name: Ocala Housing Authority			Grant Type and Number Capital Fund Program: FL29PO32501-05			Federal FY of Grant: 2005		
			Capital Fund Program:			Replacement Housing Factor #:		

Development Number	Description of Work Items	Development Account Number	Funds Approved			Funds Obligated	Funds Expended	Status of Proposed Work
			Original	Revised	Difference			
PHA Wide	OPERATIONS							
	Operating Sudsidy	1406	50,000.00					
	TOTAL	1406	50,000.00					
PHA Wide	MANAGEMENT IMPROVEMENTS							
	Staff Training	1408	5,000.00					
	Computer Upgrades	1408	5,000.00					
	MIS Technical Support	1408	3,150.00					
	TOTAL	1408	13,150.00			0.00	0.00	
PHA Wide	ADMINISTRATION							
	MOD Cordinator Salary	1410	33,500.00					
	Sundry	1410	250.00					
	TOTAL	1410	33,750.00			0.00	0.00	
PHA Wide	FEES AND COSTS							
	A & E Fees and Costs	1430						
	UPCS Inspections	1430	3,500.00					
	TOTAL	1430	3,500.00			0.00	0.00	

FL32-02	PAVILION OAKS							
	Site Improvement	1450						
	Parking Areas- Paving Sealant & Stripping	1450						
	Security Lighting	1450	4,000.00					
	Landscaping	1450	1,500.00					
	Fence Repair and Reconfiguration	1450						
	Sub-Total	1450	5,500.00			0.00	0.00	
	Dwelling Structure							
	Roof Replacement	1460	0.00					
	Install Siding on Storage Sheds	1460	11,700.00					
	Vacancy Reduction (Kitchen Cabinets &/or -	1460						
	Floor Tile Replacement) (2)	1460	10,000.00					
	HVAC Inspection, Repair and Replacement	1460	5,000.00					
	Sub-Total	1460	26,700.00			0.00	0.00	
	Dwelling Equipment - Non Expendable	1465.1						
	Appliances (Refrigerators & Gas Ranges)(10)	1465.1	3,250.00					
	Window Treatments(343)	1465.1	22,295.00					
	Sub-Total	1465.1	25,545.00			0.00	0.00	
	Non-Dwelling Equipment	1475						
	Vehicle (1)	1475						
	Sub-Total	1475	0.00				0.00	
	TOTAL		57,745.00			0.00	0.00	
FL32-03	DEER RUN							
	Site Improvements							
	Security Lighting	1450	14,000.00					
	Parking Areas - Paving Sealant & Stripping	1450						
	Replace & Install Dumpster Fence (PVC) (8)	1450						
	Sub-Total	1450	14,000.00			0.00	0.00	
	Dwelling Structure							
	Bedroom window replacement (170)	1460	35,000.00					
	Vacancy Reduction (Kitchen Cabinets &/or	1460	7,500.00					
	Floor Tile Replacement) (6)	1460						
	HVAC Inspection, Repair and Replacement	1460	7,500.00					
	Sub-Total	1460	50,000.00			0.00	0.00	
	Dwelling Equipment - Non Expendable	1465.1						
	Window Treatments	1465.1	29,575.00					
	Appliances (Refrigerators & Gas Ranges)(18)	1465.1	5,900.00					
	Sub-Total	1465.1				0.00	0.00	
	Non Dwelling Equipment	1475						

**	Playground Equipment	1475	0.00				
	Motor Cart (1)	1475					
	Sub-Total		0.00				
	TOTAL		64,000.00			0.00	0.00

FL32-04	SHADY HOLLOW						
	Site Improvements						
	Security Lighting	1450	4,000.00				
	Parking Areas - paving Sealant & Stripping	1450					
	Replace & Install Dumpster Fence (PVC) (3)	1450					
	Sub-Total	1450	4,000.00		0.00	0.00	
	Dwelling Structure						
	Vacancy Reduction (Kitchen Cabinets or Floor Tile Replacement (5)	1460	5,000.00				
	HVAC Inspection, Repair, and Replacement	1460	5,000.00				
	Sub-Total	1460	10,000.00		0.00	0.00	
	Dwelling Structure - Non Expendable	1465.1					
	Window Treatment(240)	1465.1	28,600.00				
	Appliances (Refrigerators & Gas Ranges)(13)	1465.1	4,300.00				
	Sub-Total	1465.1	32,900.00		0.00	0.00	
	Non Dwelling Equipment	1475					
	Moderize Community & Laundry Rooms	1475					
	Motor Carts(1)	1475	0.00				
	Sub-Total	1475	0.00				
	TOTAL		46,900.00		0.00	0.00	
FL32-08	PINE GARDENS						
	Site Improvements						
	Parking Areas - Paving Sealant & Stripping	1450	0.00				
	Security Lighting	1450	4,000.00				
	Replace Dumpster Fence (PVC) (1)	1450					
	Sub-Total	1450	4,000.00		0	0	
	Dwelling Structure	1460					
	Vacancy Replacement (Kitchen Cabinets & Floor Tile Replacement (2)	1460	2,500.00				
	HVAC Inspection, Repair, and Replacement	1460	1,500.00				
	Sub-Total	1460	4,000.00		-	-	
	Dwelling Equipment - Non Expendable	1465.1					
	Window Treatment (40)	1465.1	2,600.00				
	Appliances (Refrigerators & Gas Ranges)(4)	1465.1	1,300.00				
	Sub-total	1465.1	3,900.00		0	0	
	Non Dwelling Equipment	1475					
	Replace Elevator (1)	1475	0.00				
	Sub-Total	1475	0.00				
	TOTAL		11,900.00		0	0	
	TOTAL GRANT		\$ 200,045.00		0.00	0.00	

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

Development Number	All Funds Obligated			All Funds Expended			Reason for revised Target Date			
	ORIGINAL	REVISED	ACTUAL	ORIGINAL	REVISED	ACTUAL				
PHA Name: Grant Type and Number Federal FY of Grant: Capital Fund Program: FL29PO32501-05 2005 Capital Fund Program: Replacement Housing Factor #:										
	(ATTACH EXPLANATION)			(ATTACH EXPLANATION)						
PHA-Wide										
#1406	9/30/2007			9/30/2009						
#1408	9/30/2007			9/30/2009						
#1410	9/30/2007			9/30/2009						
FL32-02										
#1450	9/30/2007			9/30/2009						
#1460	9/30/2007			9/30/2009						
#1465	9/30/2007			9/30/2009						
#1475	9/30/2007			9/30/2009						
FL32-03										
#1450	9/30/2007			9/30/2009						
#1460	9/30/2007			9/30/2009						
#1465	9/30/2007			9/30/2009						
#1475	9/30/2007			9/30/2009						
FL32-04										
#1450	9/30/2007			9/30/2009						
#1460	9/30/2007			9/30/2009						
#1465	9/30/2007			9/30/2009						
#1475	9/30/2007			9/30/2009						
FL32-08										
#1450	9/30/2007			9/30/2009						
#1460	9/30/2007			9/30/2009						
#1465	9/30/2007			9/30/2009						
#1475	9/30/2007			9/30/2009						

READ

This Excel book consist of 5 different working sheets.
Sheets Name: Part I, II, III, Obligation and LOCCS

Part I, II and III are the different sections of the capital improvement budget.
Part I sheet allows some information be put directly into the form. The rest of the information will come from Part II sheet. Part I sheet is protected to prevent formula corruption.
The information from Part II sheet will automatically be transferred to the appropriate account in Part I. Part III sheet is the area of the budget that contains the implementation schedule (dates).

Obligation This is the table to record the contracts and obligation activities toward the Grant.
LOCCS This is the table to record all the LOCCS request.
The data entered in Part II, Obligation and LOCCS will be recorded in Budget Part I

If you need to modify Part I, the pass word is HUD. DO NOT USE THE TABLE WITHOUT PROTECTION. Once modified, and before using the table, stablish your own pass word.
If you have somebody using the table, do not disclose your own pass word. At all times, protect the formulas from accidental corruption.

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

Part I: Summary

**Annual Statement/Performance and Evaluation Report
Capital Fund Program**

PHA Name:

OCALA HOUSING AUTHORITY

Modernization Project Number:

FL29P032502-03

FFY of Grant Approval

2003

Original Annual Statement Reserved for Disasters/Emergencies.

Revised Annual Statement/Revision No.

Final Performance and Evaluation Report

Performance and Evaluation Report for Period Ending -March 31, 2005

LINE NO.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		ORIGINAL	REVISED (1)	OBLIGATED	EXPENDED
1	Total none-CIAP/CGP Funds				
2	1406 Operations (Not to exceed 10% of line 19)	\$40,315.00	\$74,757.99	\$74,757.99	\$74,757.99
3	1408 Management Improvements	\$3,500.00	\$3,500.00	\$3,500.00	\$3,500.00
4	1410 Administration			\$0.00	\$0.00
5	1411 Audit			\$0.00	
6	1415 Liquidated damages			\$0.00	
7	1430 Fees and Costs			\$0.00	\$0.00
8	1440 Site Acquisition			\$0.00	\$0.00
9	1450 Site Improvements	\$2,500.00	\$1,500.00	\$0.00	\$0.00
10	1460 Dwelling Structures	\$9,600.00	\$6,611.25	\$6,611.25	\$6,611.25
11	1465.1 Dwelling Equipment-Noneexpendable			\$0.00	
12	1470 Nondwelling Structure			\$0.00	
13	1475 Nondwelling Equipment	\$35,000.00	\$4,545.76	\$4,545.76	\$4,545.76
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1495.1 Relocation Cost				
17	1498 MOD Used for Development				
18	1502 Contingency (Not to exceed 8% of line 19)				
19	Amount of Annual Grant (Sum of lines 2-18)	\$90,915.00	\$90,915.00	\$89,415.00	\$89,415.00
20	Amount of line 19 Related to LBP Activities				
21	Amount of line 19 Related to Sec 504 Comp.				
22	Amount of line 19 Related to Security				
23	Amount of line 19 Related to Energy Conservation				

Signature of Executive Director & Date:

Gwendolyn B. Dawson

Signature of Public Housing Director/

Office of Native American Programs Administrator & Date:

Jonh G. Niesz, Public Housing Director

1 To be completed for Performance & Evaluation Report Or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report.

**Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Facotr (CFP/CFPRHF)**

PART II: Suporting Pages

PHA Name: Ocala Housing Authority			Grant Type and Number Capital Fund Program: FL29PO32502-03 Capital Fund Program: Replacement Housing Factor #:			Federal FY of Grant: 2003		
Development Number	Description of Work Items	Development Account Number	Funds Approved			Funds Obligated	Funds Expended	Status of Proposed Work
			Original	Revised	Difference			
PHA Wide	OPERATIONS							
	Operating Sidsidy	1406	40,315.00	74,757.99	34,442.99	74757.99	\$74,757.99	completed 12-31-04
	TOTAL	1406	40,315.00	74,757.99		74757.99	74757.99	
PHA Wide	MANAGEMENT IMPROVEMENTS							
	Staff Training	1408						
	Computer Upgrades	1408	3,500.00	3,500.00	0.00	3,500.00	3,500.00	completed 8-31-04
	MIS Technical Support	1408						
	TOTAL	1408	3,500.00	3,500.00		3,500.00	3,500.00	
PHA Wide	ADMINISTRATION							
	MOD Cordinator Salary	1410	0.00	0.00	0.00			
	Sundry	1410	0.00	0.00	0.00			
	TOTAL	1410	0.00	0.00	0.00	0.00	0.00	
PHA Wide	FEES AND COSTS							
	A & E Fees and Costs	1430	0.00	0.00	0.00			
	Physical Assessment	1430	0.00	0.00	0.00			
	TOTAL	1430	0.00	0.00	0.00	0.00	0.00	

FL32-02	PAVILION OAKS							
	Site Improvement	1450						
	Parking Areas- Paving Sealant & Stripping	1450	0.00	0.00	0.00			
	Landscaping	1450	1,500.00	1,500.00	0.00			Scheduling
	Fence Repair and Reconfiguration	1450	0.00	0.00	0.00			
	Sub-Total	1450	1,500.00	1,500.00	0.00	0.00	0.00	
	Dwelling Structure							
	Roof Replacement	1460	9,600.00	4,157.00	-5,443.00	4,157.00	4,157.00	completed 9-2004
	Vacancy Reduction (Kitchen Cabinets or - Floor Tile Replacement) (2)	1460	0.00	2,454.25	2,454.25	2,454.25	2,454.25	Completed 31,
	HVAC Inspection, Repair and Replacement	1460	0.00	0.00				
	Sub-Total	1460	9,600.00	6,611.25	-2,988.75	6,611.25	6,611.25	
	Dwelling Equipment - Non Expendable	1465.1						
	Appliances (Refrigerators & Gas Ranges)(5)	1465.1	0.00	0.00	0.00			
	Window Treatments(192)	1465.1						
	Sub-Total	1465.1	0.00	0.00	0.00			
	Non-Dwelling Equipment	1475						
	Vehicle (1)	1475	0.00	0.00	0.00			
	Sub-Total	1475	0.00	0.00	0.00	0.00	0.00	
	TOTAL		11,100.00	8,111.25	-2,988.75	6,611.25	6,611.25	
FL32-03	DEER RUN							
	Site Improvements							
	Parking Areas - Paving Sealant & Stripping	1450						
	Replace & Install Dumpster Fence (PVC) (8)	1450	0.00	0.00	0.00			
	Sub-Total	1450	0.00	0.00	0.00	0.00	0.00	
	Dwelling Structure							
	Window Treatment(254)	1460						
	Window Replacement - 2800 Section (50)	1460	0.00	0.00	0.00			
	Vacancy Reduction (Kitchen Cabinets or Floor Tile Replacement (6)	1460	0.00	0.00	0.00			
	HVAC Inspection, Repair and Replacement	1460	0.00	0.00	0.00			
	Sub-Total	1460	0.00	0.00	0.00	0.00	0.00	
	Dwelling Equipment - Non Expendable	1465.1						
	Appliances (Refrigerators & Gas Ranges)(5)	1465.1	0.00	0.00	0.00			
	Sub-Total	1465.1	0.00	0.00	0.00	0.00	0.00	
	Non Dwelling Equipment	1475						
**	Playground Equipment	1475	0.00	0.00	0.00			
	Motor Cart (1)	1475						
	Sub-Total		0.00	0.00	0.00			
			0.00	0.00	0.00	0.00	0.00	

FL32-04	SHADY HOLLOW							
	Site Improvements							
	Parking Areas - paving Sealant & Stripping	1450						
	Replace & Install Dumpster Fence (PVC) (3)	1450	0.00	0.00	0.00			
	Sub-Total	1450	0.00	0.00	0.00	0.00	0.00	
	Dwelling Structure							
	Vacancy Reduction (Kitchen Cabinets or Floor Tile Replacement (5)	1460	0.00	0.00	0.00		0.00	0.00
	HVAC Inspection, Repair, and Replacement	1460	0.00	0.00	0.00			
	Sub-Total	1460	0.00	0.00	0.00	0.00	0.00	
	Dwelling Structure - Non Expendable	1465.1						
	Window Treatment(219)	1465.1						
	Appliances (Refrigerators & Gas Ranges)(5)	1465.1	0.00	0.00	0.00			
	Sub-Total	1465.1	0.00	0.00	0.00	0.00	0.00	
	Non Dwelling Equipment	1475						
	Moderize Community & Laundry Rooms	1475						
	Motor Carts(1)	1475	0.00	0.00	0.00			
	Sub-Total	1475	0.00	0.00	0.00			
	TOTAL		0.00	0.00	0.00	0.00	0.00	
FL32-08	PINE GARDENS							
	Site Improvements							
	Parking Areas - Paving Sealant & Stripping	1450	1,000.00	0.00	-1,000.00			Postpone
	Replace Dumpster Fence (PVC) (1)	1450	0.00	0.00	0.00			
	Sub-Total	1450	1,000.00	0.00	-1,000.00	0	0	
	Dwelling Structure	1460						
	Vacancy Replacement (Kitchen Cabinets & Floor Tile Replacement (1)	1460	0.00	0.00	0.00			
	HVAC Inspection, Repair, and Replacement	1460	0.00	0.00	0.00			
	Sub-Total	1460	0.00	0.00	0.00	-	-	
	Dwelling Equipment - Non Expendable	1465.1						
	Window Treatment (40)	1465.1						
	Appliances (Refrigerators & Gas Ranges)(8)	1465.1	0.00	0.00	0.00			
	Sub-total	1465.1	0.00	0.00	0.00	0	0	
	Non Dwelling Equipment	1475						
	Replace Elevator (1)	1475	35,000.00	4,545.76	-30,454.24	4,545.76	4,545.76	completed 7-20
	Sub-Total	1475	35,000.00	4,545.76	-30,454.24	4,545.76	4,545.76	
	TOTAL		36,000.00	4,545.76	-31,454.24	4,545.76	4,545.76	Repairs comple
	TOTAL GRANT		\$ 90,915.00	\$ 90,915.00	0.00	89,415.00	89,415.00	

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

Development Number	All Funds Obligated			All Funds Expended			Reason for revised Target Date			
	ORIGINAL	REVISED	ACTUAL	ORIGINAL	REVISED	ACTUAL				
PHA Name: Grant Type and Number Federal FY of Grant: Capital Fund Program: FL29PO32502-03 2003 Capital Fund Program: Replacement Housing Factor #:										
	(ATTACH EXPLANATION)			(ATTACH EXPLANATION)						
PHA-Wide										
#1406	9/30/2005		12/31/2004	9/30/2006		12/31/2004				
#1408	9/30/2005		9/30/2004	9/30/2006		9/30/2004				
FL32-02										
#1450	9/30/2005			9/30/2006						
#1460	9/30/2005		3/31/2005	9/30/2006		3/31/2005				
FL32-03										
#1450	9/30/2005			9/30/2006						
#1460	9/30/2005		3/31/2005	9/30/2006		3/31/2005				
FL32-04										
#1450	9/30/2005			9/30/2006						
#1460	9/30/2005		3/31/2005	9/30/2006		3/31/2005				
FL32-08										
#1450	9/30/2005			9/30/2006						
#1460	9/30/2005		3/31/2005	9/30/2006		3/31/2005				
#1475	9/30/2005		9/30/2004	9/30/2006		9/30/2004				

READ

This Excel book consist of 5 different working sheets.
Sheets Name: Part I, II, III, Obligation and LOCCS

Part I, II and III are the different sections of the capital improvement budget.
Part I sheet allows some information be put directly into the form. The rest of the information will come from Part II sheet. Part I sheet is protected to prevent formula corruption.
The information from Part II sheet will automatically be transferred to the appropriate account in Part I. Part III sheet is the area of the budget that contains the implementation schedule (dates).

Obligation This is the table to record the contracts and obligation activities toward the Grant.
LOCCS This is the table to record all the LOCCS request.
The data entered in Part II, Obligation and LOCCS will be recorded in Budget Part I

If you need to modify Part I, the pass word is HUD. DO NOT USE THE TABLE WITHOUT PROTECTION. Once modified, and before using the table, stablish your own pass word. If you have somebody using the table, do not disclose your own pass word. At all times, protect the formulas from accidental corruption.

Annual Statement/Performance and Evaluation Report
 Capital Fund Program **Part I: Summary**

U. S. Department of Housing
and Urban Development

OMB Approval NO. 2577-01
 (exp. 06/30/2005)

Office of Public and Indian Housing

PHA Name:

OCALA HOUSING AUTHORITY

Capital Fund Grant Project Number:

FL29R03250100

FFY of Grant Approval

2000

Original Annual Statement Reserved for Disasters/Emergencies. Revised Annual Statement/Revision No.

Final Performance and Evaluation Report Performance and Evaluation for Period Ending 3-31-05

LINE NO.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		ORIGINAL	REVISED (1)	OBLIGATED	EXPENDED
1	Total none-CIAP/CGP Funds				
2	1406 Operations (Not to exceed 10% of line 19)		\$1,268.93		
3	1408 Management Improvements				
4	1410 Administration	\$65,552.00	\$83,623.26	\$65,552.00	\$65,552.00
5	1411 Audit				
6	1415 Liquidated damages				
7	1430 Fees and Costs	\$40,274.00	\$138,876.61	\$40,274.00	\$40,274.00
8	1440 Site Acquisition				
9	1450 Site Improvements	\$0.00	\$19,645.20		
10	1460 Dwelling Structures				
11	1465.1 Dwelling Equipment-Noneexpendable				
12	1470 Nondwelling Structure				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Cost				
18	1499 MOD Used for Development	\$137,588.00	\$0.00	\$105,826.00	\$105,826.00
19	1502 Contingency (Not to exceed 8% of line 20)				
20	Amount of Annual Grant (Sum of lines 2-19)	\$243,414.00	\$243,414.00	\$105,826.00	\$105,826.00
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Sec 504 Comp.				
23	Amount of line 20 Related to Security				
24	Amount of line 20 Related to Energy Conservation				

Signature of Executive Director & Date:

Gwendolyn B. Dawson

Signature of Public Housing Director/

Office of Native American Programs Administrator & Date:

Jonh G. Niesz, Public Housing Director

1 To be completed for Performance & Evaluation Report Or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report.

**Annual Statement/Performance and Evaluation Report
Capital Fund Program (CFP)
PART II: Supporting Pages**

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

Development Number	Description of Work Items	Development Account	Quantity	Funds Approved		Funds Obligated	Funds Expended	Status of Proposed Work
				Original	Revised			
FL032010	Operations	1406		0.00	1,268.93			Scheduled
FL032010	Management Improvements	1408						
FL032010	Administration	1410		65,552.00	83,623.26	65,552.00	\$65,552.00	Scheduled
FL032010	Audit	1411						
FL032010	Liquidated Damages	1415						
FL032010	Fees & Costs	1430		40,274.00	138,876.61	40,274.00	\$40,274.00	Scheduled
FL032010	Site Acquisition	1440						
FL032-010	Site Improvement	1450		0.00	19,645.20			Scheduled
FL032-010	Dwelling Structures	1460						
FL032-009	Mod Used for Work Demonstration	1499		137,588.00	0.00			Reallocated
	TOTAL GRANT			243,414.00	243,414.00	\$105,826.00	\$105,826.00	

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

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

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

Development Number	All Funds Obligated			All Funds Expended			Reason for revised Target Date	
	ORIGINAL	REVISED 1	ACTUAL 2	ORIGINAL	REVISED	ACTUAL		
	(ATTACH EXPLANATION)			(ATTACH EXPLANATION)				
FL29P032009	6/16/2002		12/31/2002	6/16/2006		12/31/2002		
FL29P032010	6/16/2002	6/30/2005		6/16/2006	12/31/2005		Currently in Construction	

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

READ

This Excel book consist of 5 different working sheets.
Sheets Name: Part I, II, III, Obligation and LOCCS

Part I, II and III are the different sections of the capital improvement budget.
Part I sheet allows some information be put directly into the form. The rest of the information will come from Part II sheet. Part I sheet is protected to prevent formula corruption.
The information from Part II sheet will automatically be transferred to the appropriate account in Part I. Part III sheet is the area of the budget that contains the implementation schedule (dates).

Obligation This is the table to record the contracts and obligation activities toward the Grant.
LOCCS This is the table to record all the LOCCS request.
The data entered in Part II, Obligation and LOCCS will be recorded in Budget Part I

If you need to modify Part I, the pass word is HUD. DO NOT USE THE TABLE WITHOUT PROTECTION. Once modified, and before using the table, stablish your own pass word.
If you have somebody using the table, do not disclose your own pass word. At all times, protect the formulas from accidental corruption.

Annual Statement/Performance and Evaluation Report
 Capital Fund Program **Part I: Summary**

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

OMB Approved No. 2577-01
 (exp. 06/30/2005)

PHA Name: **OCALA HOUSING AUTHORITY** Modernization Project Number: **FL29R03250101** FFY of Grant Approval: **2001**

Original Annual Statement Reserved for Disasters/Emergencies. Revised Annual Statement/Revision No.
 Final Performance and Evaluation Report Performance and Evaluation for Period Ending 3-31-05

LINE NO.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		ORIGINAL	REVISED (1)	OBLIGATED	EXPENDED
1	Total none-CIAP/CGP Funds				
2	1406 Operations (Not to exceed 10% of line 19)				
3	1408 Management Improvements		\$36,000.00		
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvements		\$212,370.00		
10	1460 Dwelling Structures				
11	1465.1 Dwelling Equipment-Noneexpendable				
12	1470 Nondwelling Structure				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1495.1 Relocation Cost				
17	1499 MOD Used for Development	\$248,370.00		\$0.00	\$0.00
18	1502 Contingency (Not to exceed 8% of line 19)				
19	Amount of Annual Grant (Sum of lines 2-18)	\$248,370.00	\$248,370.00	\$0.00	\$0.00
20	Amount of line 19 Related to LBP Activities				
21	Amount of line 19 Related to Sec 504 Comp.				
22	Amount of line 19 Related to Security				
23	Amount of line 19 Related to Energy Conservation				

Signature of Executive Director & Date:

Gwendolyn B. Dawson

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

Jonh G. Niesz, Public Housing Director

1 To be completed for Performance & Evaluation Report Or a Revised Annual Statement.
 2 To be completed for the Performance and Evaluation Report.

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

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

Development Number	Description of Work Items	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised	Funds Obligated	Funds Expended	
FL032-010	Mod Used for Work Demonstration	1499		248,370.00	0.00	\$0.00	\$0.00	
FL032-010	Management Improvement	1408						
	General Marketing					\$0.00	\$0.00	Scheduled
	TOTAL			0.00		0.00	\$0.00	
FL032-010	Administration	1410						
	Salaries				36,000.00	0.00	\$0.00	Scheduled
	TOTAL			0.00	36,000.00	0.00	0.00	
FL032-010	Fees and Costs	1430						
	Architects & Engineer					0	0	Scheduled
	TOTAL			0.00	0.00	0.00	0.00	
FL032-010	Site Improvement	1450						
	Infrastructure Installation				212,370.00	0.00	0.00	Scheduled
	TOTAL				212,370.00	0.00	0.00	
	TOTAL			0.00	248,370.00	0.00	0.00	

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

b

READ

This Excel book consist of 5 different working sheets.
Sheets Name: Part I, II, III, Obligation and LOCCS

Part I, II and III are the different sections of the capital improvement budget.
Part I sheet allows some information be put directly into the form. The rest of the information will come from Part II sheet. Part I sheet is protected to prevent formula corruption.
The information from Part II sheet will automatically be transferred to the appropriate account in Part I. Part III sheet is the area of the budget that contains the implementation schedule (dates).

Obligation This is the table to record the contracts and obligation activities toward the Grant.
LOCCS This is the table to record all the LOCCS request.
The data entered in Part II, Obligation and LOCCS will be recorded in Budget Part I

If you need to modify Part I, the pass word is HUD. DO NOT USE THE TABLE WITHOUT PROTECTION. Once modified, and before using the table, stablish your own pass word. If you have somebody using the table, do not disclose your own pass word. At all times, protect the formulas from accidental corruption.

Annual Statement/Performance and Evaluation Report
 Capital Fund Program **Part I: Summary**

U. S. Department of Housing
 and Urban Development

OMB Approval No. 25
 (exp. 06/30/2005)

Office of Public and Indian Housing

PHA Name:

OCALA HOUSING AUTHORITY

Capital Fund Program Project Number:

FL29R03250102

FFY of Grant Approval

2002

Original Annual Statement Reserved for Disasters/Emergencies. Revised Annual Statement/Revision No.

Final Performance and Evaluation Report Performance and Evaluation for Period Ending 3-31-05

LINE NO.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		ORIGINAL	REVISED (1)	OBLIGATED	EXPENDED
1	Total none-CIAP/CGP Funds				
2	1406 Operations (Not to exceed 10% of line 19)		\$4,205.80		
3	1408 Management Improvements		\$5,000.00		
4	1410 Administration		\$36,000.00		
5	1411 Audit				
6	1415 Liquidated damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvements		\$162,884.20	\$0.00	\$0.00
10	1460 Dwelling Structures			\$0.00	\$0.00
11	1465.1 Dwelling Equipment-Noneexpendable			\$0.00	\$0.00
12	1470 Nondwelling Structure				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1495.1 Relocation Cost				
17	1499 MOD Used for Development	\$243,090.00		\$0.00	\$0.00
18	1502 Contingency (Not to exceed 8% of line 19)				
19	Amount of Annual Grant (Sum of lines 2-18)	\$243,090.00	\$208,090.00	\$0.00	\$0.00
20	Amount of line 19 Related to LBP Activities				
21	Amount of line 19 Related to Sec 504 Comp.				
22	Amount of line 19 Related to Security				
23	Amount of line 19 Related to Energy Conservation				

Signature of Executive Director & Date:

Gwendolyn B. Dawson

Signature of Public Housing Director/

Office of Native American Programs Administrator & Date:

Jonh G. Niesz, Public Housing Director

1 To be completed for Performance & Evaluation Report Or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report.

**Annual Statement/Performance and Evaluation Report
Capital Fund Program (CFP)
PART II: Supporting Pages**

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

Development Number	Description of Work Items	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised	Funds Obligated	Funds Expended	
FL032-010	Mod Used for Work Demonstration	1499		208,090.00	0.00	0.00	0.00	
FL032-010	Operations	1406			4,205.80			
FL032-010	Administration	1408			5,000.00			
FL032-010	Administration	1408			36,000.00			
FL032-010	Site Improvement	1450						
	Infrastructure Installation				162,884.20	0.00	0.00	Scheduled
	TOTAL				162,884.20	0.00	0.00	
FL032-010	Dwelling Structure	1460						
	Construction					0.00	0.00	
	TOTAL					0.00	0.00	
FL032-010	Dwelling Equipments	1465						
	Ranges					0.00	0.00	
	Refrigerators					0.00	0.00	
	Amenties					0.00	0.00	
	TOTAL					0.00	0.00	
FL032-010	Contingency	1502				0.00	0.00	
	Total					0.00	0.00	
	TOTAL				208,090.00	0.00	0.00	

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

LOCCS

READ

This Excel book consist of 5 different working sheets.
Sheets Name: Part I, II, III, Obligation and LOCCS

Part I, II and III are the different sections of the capital improvement budget.
Part I sheet allows some information be put directly into the form. The rest of the information will come from Part II sheet. Part I sheet is protected to prevent formula corruption.
The information from Part II sheet will automatically be transferred to the appropriate account in Part I. Part III sheet is the area of the budget that contains the implementation schedule (dates).

Obligation This is the table to record the contracts and obligation activities toward the Grant.
LOCCS This is the table to record all the LOCCS request.
The data entered in Part II, Obligation and LOCCS will be recorded in Budget Part I

If you need to modify Part I, the pass word is HUD. DO NOT USE THE TABLE WITHOUT PROTECTION. Once modified, and before using the table, stablish your own pass word. If you have somebody using the table, do not disclose your own pass word. At all times, protect the formulas from accidental corruption.

Annual Statement/Performance and Evaluation Report
 Capital Fund Program **Part I: Summary**

U. S. Department of Housing
 and Urban Development

OMB approval No. 25
 (exp. 06/30/2005)

Office of Public and Indian Housing

PHA Name:

OCALA HOUSING AUTHORITY

Modernization Project Number:

FL29R03250103

FFY of Grant Approval

2003

Original Annual Statement Reserved for Disasters/Emergencies. Revised Annual Statement/Revision No. 1

Final Performance and Evaluation Report Performance and Evaluation for Period Ending - 3-31-2004

LINE NO.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		ORIGINAL	REVISED (1)	OBLIGATED	EXPENDED
1	Total none-CIAP/CGP Funds				
2	1406 Operations (Not to exceed 10% of line 19)				
3	1408 Management Improvements		\$0.00	\$0.00	\$0.00
4	1410 Administration		\$36,000.00	\$0.00	\$0.00
5	1411 Audit				
6	1415 Liquidated damages				
7	1430 Fees and Costs			\$0.00	\$0.00
8	1440 Site Acquisition				
9	1450 Site Improvements			\$0.00	\$0.00
10	1460 Dwelling Structures		\$166,170.00	\$0.00	\$0.00
11	1465.1 Dwelling Equipment-Noneexpendable				
12	1470 Nondwelling Structure				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1495.1 Relocation Cost				
17	1499 MOD Used for Development	\$202,170.00		\$0.00	\$0.00
18	1502 Contingency (Not to exceed 8% of line 19)				
19	Amount of Annual Grant (Sum of lines 2-18)	\$202,170.00	\$202,170.00	\$0.00	\$0.00
20	Amount of line 19 Related to LBP Activities				
21	Amount of line 19 Related to Sec 504 Comp.				
22	Amount of line 19 Related to Security				
23	Amount of line 19 Related to Energy Conservation				

Signature of Executive Director & Date:

Gwendolyn B. Dawson

Signature of Public Housing Director/

Office of Native American Programs Administrator & Date:

Jonh G. Niesz, Public Housing Director

1 To be completed for Performance & Evaluation Report Or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report.

**Annual Statement/Performance and Evaluation Report
Capital Fund Program (CFP)
PART II: Supporting Pages**

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

PHA Name:

Ocala Housing Authority

Grant Type and Number

Capital Fund Program:
Capital Fund Program:

Federal FY of Grant:

2003

Development Number	Description of Work Items	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised 1	Funds Obligated 2	Funds	
							Expended 2	
FL032-010 & FL032011	Mod Used for Work Demonstration	1499		202,170.00	0.00	\$0.00	\$0.00	
FL032-010	Management Improvement	1408						
	Marketing			0.00		0.00	\$0.00	
	Training			0.00		0.00	0.00	
	Total			0.00	0.00	0.00	0.00	
FL032-010	Administration	1410						
	Salary			0.00	36,000.00	0.00	0.00	Project under construction
	Total			0.00	36,000.00	0.00	0.00	
FL032-010	Fees and Costs	1430						
	Architects and Engineer			0.00		0.00	0.00	
	Total			0.00	0.00	0.00	0.00	
FL032-010	Site Improvement	1450						
	Infrastructure Improvements			0.00		0.00	0.00	
	Total			0.00	0.00	0.00	0.00	
FL032-010	Dwelling Structure	1460						
	Construction			0	166170	0	0	Project under construction
	Total			0	166170	0	0	
	TOTAL			202,170.00	202,170.00	0.00	0.00	

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

READ

This Excel book consist of 5 different working sheets.
Sheets Name: Part I, II, III, Obligation and LOCCS

Part I, II and III are the different sections of the capital improvement budget.
Part I sheet allows some information be put directly into the form. The rest of the information will come from Part II sheet. Part I sheet is protected to prevent formula corruption.
The information from Part II sheet will automatically be transferred to the appropriate account in Part I. Part III sheet is the area of the budget that contains the implementation schedule (dates).

Obligation This is the table to record the contracts and obligation activities toward the Grant.
LOCCS This is the table to record all the LOCCS request.
The data entered in Part II, Obligation and LOCCS will be recorded in Budget Part I

If you need to modify Part I, the pass word is HUD. DO NOT USE THE TABLE WITHOUT PROTECTION. Once modified, and before using the table, stablish your own pass word. If you have somebody using the table, do not disclose your own pass word. At all times, protect the formulas from accidental corruption.

Annual Statement/Performance and Evaluation Report
Capital Fund Program **Part I: Summary**

U. S. Department of Housing
and Urban Development

OMB Approval No. 2577-0157
(exp. 06/30/2005)

Office of Public and Indian Housing

PHA Name:

OCALA HOUSING AUTHORITY

Capital Fund Program Project Number:

FL29R032501-04

FFY of Grant Approval

2004

Original Annual Statement Reserved for Disasters/Emergencies. Revised Annual Statement/Revision No.

Final Performance and Evaluation Report Performance and Evaluation for Period Ending - March 31, 2005

LINE NO.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		ORIGINAL	REVISED (1)	OBLIGATED	EXPENDED
1	Total none-CIAP/CGP Funds				
2	1406 Operations (Not to exceed 10% of line 19)				
3	1408 Management Improvements				
4	1410 Administration		\$36,000.00		
5	1411 Audit				
6	1415 Liquidated damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvements				
10	1460 Dwelling Structures		\$198,135.00		
11	1465.1 Dwelling Equipment-Noneexpendable				
12	1470 Nondwelling Structure				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Cost				
18	1499 MOD Used for Development	\$243,090.00	\$0.00	\$0.00	\$0.00
19	1502 Contingency (Not to exceed 8% of line 20)				
20	Amount of Annual Grant (Sum of lines 2-19)	\$243,090.00	\$234,135.00	\$0.00	\$0.00
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Sec 504 Comp.				
23	Amount of line 20 Related to Security				
24	Amount of line 20 Related to Energy Conservation				

Signature of Executive Director & Date:

Gwendolyn B. Dawson

Signature of Public Housing Director/

Office of Native American Programs Administrator & Date:

Jonh G. Niesz, Public Housing Director

1 To be completed for Performance & Evaluation Report Or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report.

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

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

Development Number	Description of Work Items	Development Account Number	Quantity	All Funds Obligated (Quarter Ending)		All Funds Expended (Quarter Ending)		Status of Proposed Work
				Original	Revised 1	Funds	Funds	
						Obligated	Expended	
FL032-010 & FL032011	Mod Used for Work Demonstration	1499		243,090.00	0.00	\$0.00	\$0.00	
FL032-010	Management Improvement	1408						
	Marketing			0.00		0.00	\$0.00	
	Training			0.00		0.00	0.00	
	Total			0.00	0.00	0.00	0.00	
FL032-010	Administration	1410						
	Salary			0.00	36,000.00	0.00	0.00	Project under construction
	Total			0.00	36,000.00	0.00	0.00	
FL032-010	Fees and Costs	1430						
	Architects and Engineer			0.00		0.00	0.00	
	Total			0.00	0.00	0.00	0.00	
FL032-010	Site Improvement	1450						
	Infrastructure Improvements			0.00		0.00	0.00	
	Total			0.00	0.00	0.00	0.00	
FL032-010	Dwelling Structure	1460						
	Construction			0	198135	0	0	Project under construction
	Total			0	198135	0	0	

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

READ

This Excel book consist of 5 different working sheets.
Sheets Name: Part I, II, III, Obligation and LOCCS

Part I, II and III are the different sections of the capital improvement budget.
Part I sheet allows some information be put directly into the form. The rest of the information will come from Part II sheet. Part I sheet is protected to prevent formula corruption.
The information from Part II sheet will automatically be transferred to the appropriate account in Part I. Part III sheet is the area of the budget that contains the implementation schedule (dates).

Obligation This is the table to record the contracts and obligation activities toward the Grant.
LOCCS This is the table to record all the LOCCS request.
The data entered in Part II, Obligation and LOCCS will be recorded in Budget Part I

If you need to modify Part I, the pass word is HUD. DO NOT USE THE TABLE WITHOUT PROTECTION. Once modified, and before using the table, stablish your own pass word.
If you have somebody using the table, do not disclose your own pass word. At all times, protect the formulas from accidental corruption.

Annual Statement/Performance and Evaluation Report
 Capital Fund Program **Part I: Summary**

U. S. Department of Housing
 and Urban Development

OMB Approval No. 2577-0157
 (exp. 06/30/2005)

Office of Public and Indian Housing

PHA Name:

OCALA HOUSING AUTHORITY

Capital Fund Program Project Number:

FL29R032501-05

FFY of Grant Approval

2005

Original Annual Statement Reserved for Disasters/Emergencies. Revised Annual Statement/Revision No.

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

LINE NO.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		ORIGINAL	REVISED (1)	OBLIGATED	EXPENDED
1	Total none-CIAP/CGP Funds				
2	1406 Operations (Not to exceed 10% of line 19)				
3	1408 Management Improvements				
4	1410 Administration	\$36,000.00			
5	1411 Audit				
6	1415 Liquidated damages				
7	1430 Fees and Costs	\$10,000.00			
8	1440 Site Acquisition				
9	1450 Site Improvements				
10	1460 Dwelling Structures	\$143,335.00			
11	1465.1 Dwelling Equipment-Noneexpendable	\$44,800.00			
12	1470 Nondwelling Structure				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Cost				
18	1499 MOD Used for Development			\$0.00	\$0.00
19	1502 Contingency (Not to exceed 8% of line 20)				
20	Amount of Annual Grant (Sum of lines 2-19)	\$234,135.00		\$0.00	\$0.00
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Sec 504 Comp.				
23	Amount of line 20 Related to Security				
24	Amount of line 20 Related to Energy Conservation				

Signature of Executive Director & Date:

Gwendolyn B. Dawson

Signature of Public Housing Director/

Office of Native American Programs Administrator & Date:

Jonh G. Niesz, Public Housing Director

1 To be completed for Performance & Evaluation Report Or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report.

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

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

Development Number	Description of Work Items	Development Account Number	Quantity	All Funds Obligated (Quarter Ending)		All Funds Expended (Quarter Ending)		Status of Proposed Work
				Original	Revised 1	Funds	Funds	
						Obligated	Expended	
FL032-010	Mod Used for Work Demonstration	1499			0.00	\$0.00	\$0.00	
FL032-010	Management Improvement	1408						
	Marketing			0.00		0.00	\$0.00	
	Training			0.00		0.00	0.00	
	Total			0.00	0.00	0.00	0.00	
FL032-010	Administration	1410						
	Salary			36,000.00		0.00	0.00	Project under construction
	Total			36,000.00	0.00	0.00	0.00	
FL032-010	Fees and Costs	1430						
	Architects and Engineer			10,000.00		0.00	0.00	
	Total			10,000.00	0.00	0.00	0.00	
FL032-010	Site Improvement	1450						
	Infrastructure Improvements			0.00		0.00	0.00	
	Total			0.00	0.00	0.00	0.00	
FL032-010	Dwelling Structure	1460						
	Construction			143335		0	0	Project under construction
	Total			143335		0	0	
FL032-010	Dwelling Equipment	1475						
	Appliances & Amenties		28 sets	44800				
	Total			44800				

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

