

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

PHA Plans

5 Year Plan for Fiscal Years 2005 - 2009

Annual Plan for Fiscal Year 2005

HACFM Fiscal Year beginning 04/01/2005

f1047v01 submitted January, 2005

f1047v02 submitted March 24, 2005

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

**PHA Plan
Agency Identification**

PHA Name: Housing Authority of the City of Fort Myers

PHA Number: FL 047

PHA Fiscal Year Beginning: (mm/yyyy) 04/2005

Public Access to Information

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

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

Display Locations For PHA Plans and Supporting Documents

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

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

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

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

5-YEAR PLAN
PHA FISCAL YEARS 2005 - 2009
[24 CFR Part 903.5]

A. Mission

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

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- The PHA's mission is: (state mission here)
The Housing Authority of the City of Fort Myers, a professional housing management governmental corporation, owns, manages, develops and administers federal state and local housing and social programs for low, very low and moderate income families while successfully implementing national housing policies incorporating family self-sufficiency as a main component for transitioning families from welfare to work. The Authority's focus is to change the face of public housing by transforming the most severely distressed public housing in Fort Myers from sources of urban blight to engines of urban renewal creating paradigm shifts in public housing culture, values and behavior through establishing positive incentives for resident self-sufficiency, providing comprehensive services that empower residents, while lessening concentrations of poverty, promoting mixed-income communities and assuring equal access to safe quality housing for low, very low and moderate income families throughout the 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.

- PHA Goal: Expand the supply of assisted housing
Objectives:
- Apply for additional rental vouchers:
 - Reduce public housing vacancies:
 - Leverage private or other public funds to create additional housing opportunities:
 - Acquire or build units or developments
 - Other (list below)

- PHA Goal: Improve the quality of assisted housing
Objectives:
 - Improve public housing management: (PHAS score)
 - Improve voucher management: (SEMAP score)
 - Increase customer satisfaction:
 - Concentrate on efforts to improve specific management functions:
(list; e.g., public housing finance; voucher unit inspections)
 - Renovate or modernize public housing units:
 - Demolish or dispose of obsolete public housing:
 - Provide replacement public housing:
 - Provide replacement vouchers:
 - Other: (list below)

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

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

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

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

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

Objectives:

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

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

PHA Goal: Ensure equal opportunity and affirmatively further fair housing

Objectives:

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

Other PHA Goals and Objectives: (list below)

NONE

**SUMMARY OF ACTIVITIES UNDERTAKEN BY HACFM DURING FY2004
TOWARD ACHIEVING THE PREVIOUS (FY2000-2004)
HACFM GOALS & OBJECTIVES:**

I. Maintain a High Occupancy Rate of Rental Units

- HACFM evaluated the success of using outside maintenance service contractors to supplement in-house efforts.
- HACFM continued to market vacancies.
- Revised Intake procedures to develop a Pre-App
- Developed automated system for processing applications
- Implemented flat rents

II. Upgrading the existing housing stock

- Inspected units to develop costs & extent of needed renovations

- Began Renovations in Public Housing to modernize baths and kitchens in Michigan and upgrade flooring with carpeting and vinyl in Southward and Palmetto
- III. Providing additional affordable rental housing stock**
- Developed & submitted HUD HOPE VI application in FY 2004
 - Began developing public/private partnerships for HOPE VI project
 - Created additional housing by purchasing Horizons in Oct 2000 for fair market rental, providing 180 units.
 - Prepared a study of housing needs in 2000
- IV. Ensure long-term viability of the agency**
- Continue on-going meetings w/ City to discuss City's Section 8 program
- V. Improve the quality and process for delivery of resident services**
- Investigated services provided by outside agencies
 - Investigated residents transportation needs. Met with local transportation provider to tailor routes for public housing residents
 - Purchased additional van for resident transport
 - Investigated start-up opportunities for adult education through
 - A. Community Technology Grant (2001 & 2002))
 - B. Microsoft Neighborhood Network Center Grant application (FY 2001)
 - C. Public Housing Drug Elimination Grant FY 2001
 - D. Multi-Family Drug Elimination Grant FY 2001
 - E. ROSS Resident Opportunities Grant FY 2001
 - F. New Approach Drug Grant FY 2000
 - G. ROSS Elderly Service Coordinator (2001, 2002, 2003 & 2004)
 - H. ROSS Neighborhood Networks Grant (FY 2003)
 - I. ROSS Family Grant (FY 2004)
- VI. Provide programs that support and/or encourage economic opportunity for residents**
- Submitted and received approval for FSS Program Protocol in 2003
 - Began FSS Program in 2003 with over 20 families enrolled
 - Developed FSS Task Force of Local Service Providers in 2003
 - Surveyed local providers and collected information on programs which promote resident self-sufficiency
 - Submitted HUD ROSS Neighborhood Network Grant FY 2003
 - Received Funding and Opened NNC 10//04
 - Submitted Community Technology Center Grants (D. of Ed)
 - Submitted ROSS Resident Opportunities Grant (HUD)
 - Submitted ROSS Family Grant 2004

- Met with Lee Tran to improve transportation for Residents
- VII. Establish a Housing Consortium/Mini District**
The Board decided, after reviewing this strategy, to eliminate it from the goals & objectives.
- VIII. Create Homeownership Opportunities**
The Board decided, after reviewing this strategy, to eliminate it from the goals and objectives.
- IX. Change the face of public housing along with public perception.**
- Conducted a salary comparability study in FY 2000
 - Implemented Staff Training Programs in FY 2001 & 2002
 - Community Service : In FY 2004, Information on the program as again involuntary was sent to residents. Meetings held and notices posted throughout the HACFM notifying residents of HUD regulations. Provided for the Resident Initiatives Coordinator of FMHA to attend all Resident Council Meetings and interact with residents, following up and explaining service requirements. Staff maintaining records of service on eligible residents.
 - Neighborhood Appearance: The FMHA switched to City Trash pick up in 2002 which provides larger containers for trash in an effort to improve neighborhood appearance. The FMHA also stepped up enforcement of lease violations having to do with littering in 2002; improved perimeter lighting; and painted PH development exteriors to improve curb-appeal of properties.
 - Safety: To ensure resident safety and security in Public Housing, the FMHA vigorously enforced evictions and has stepped up lease violations. A Fraud Investigator was also hired.
 - After reviewing this strategy, the Board decided to eliminate it from the goals and objectives.

Annual PHA Plan
PHA Fiscal Year 2005

[24 CFR Part 903.7]

i. Annual Plan Type:

Select which type of Annual Plan the PHA will submit.

Standard Plan

Streamlined Plan:

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

Troubled Agency Plan

ii. Executive Summary of the Annual PHA Plan

[24 CFR Part 903.7 9 (r)]

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

The Housing Authority of the City of Fort Myers has developed its Annual and 5 yr Plans to address affordable housing needs for low income residents of the City of Fort Myers by operating safe, secure housing and providing programs that support and encourage economic self-sufficiency opportunities for residents. As part of its planning, the Housing Authority developed and reviewed a set of goals and objectives which are designed to provide a comprehensive approach to accomplishing its overall mission. One facet of the Plan provides for an on-going review of all HACFM operations to improve service delivery, achieve maximum fiscal prudence and maximize revenue from both conventional and non-conventional sources. Another facet of the plan provides for managing existing and future assets to ensure a trend of increasing positive cash flow for the Housing Authority, which is significant in relation to HUD's reductions of Capital and Operating funding .

During FY 2003-04, the HACFM held a hearing, submitted an application to HUD and was granted "Elderly Only Designation" for three of its developments, namely Bonair Towers, Royal Palm Tower, and Flossie M. Riley Garden Apartments.

During 2003-4 the HACFM followed the HUD mandates concerning involuntary resident participation in the Community Service Program. Residents were notified in meetings, by mail and by notices posted throughout the HA. Appropriate changes were made to reflect this change in the PH Admissions policy and lease documents and staff began reporting eligible resident service hours.

Over the past year, Average Unadjusted Income for all 3 family Public Housing developments rose from \$8668 to \$8753. All 3 developments fall within the HUD guidelines for Income Deconcentration.

During FY 2004, the HACFM received a Neighborhood Network Center grant for Michigan Court to offer computer technology to residents and improve their path to self-sufficiency . The NNC had its Grand Opening in October, 2004.

The HACFM received certification of its Family Self Sufficiency Program protocol and has formally instituted the Program in which over 20 families participate as well as an active task force of local service partners. An application was submitted in 2004 for a HUD ROSS Family grant to assist in funding this successful program.

During 2004, the HACFM developed and submitted a HOPE VI plan involving public / private partnerships which reaches out to all segments of the community. The HACFM will continue to refine and further develop this Plan to resubmit to HUD in 2005. Additionally in the coming year, the HACFM will continue focusing on increasing resident involvement, providing safety and security, and improving neighborhood appearance. The HACFM will continue reviewing operations and viable options in an effort to manage existing and future assets with an overall goal of self-sufficiency.

Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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

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Attachments

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

Required Attachments:

- Admissions Policy for Deconcentration
- FY 2005 Capital Fund Program Annual Statement
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

Optional Attachments:

- PHA Management Organizational Chart
- FY 2005 Capital Fund Program 5 Year Action Plan
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- Other (List below, providing each attachment name)

Supporting Documents Available for Review

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation:	5 Year and Annual Plans

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	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.	
X	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
	Section 8 rent determination (payment standard) policies <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	Section 8 informal review and hearing procedures <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
	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
	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
X	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
X	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
X	The most recent Public Housing Drug Elimination Program (PHDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

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

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

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	2,056	5	5	N/A	N/A	N/A	N/A
Income >30% but <=50% of AMI	1,6123	5	5	N/A	N/A	N/A	N/A
Income >50% but <80% of AMI	2,020	4	4	N/A	N/A	N/A	N/A
Elderly	1,349	5	5	N/A	N/A	N/A	N/A
Families with Disabilities	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Race/Ethnicity European/American	2,979	5	5	N/A	N/A	N/A	N/A
Race/Ethnicity African American	2,224	5	5	N/A	N/A	N/A	N/A
Race/Ethnicity Hispanic	434	5	5	N/A	N/A	N/A	N/A
Race/Ethnicity							

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

- Consolidated Plan of the Jurisdiction/s
Indicate year:
- U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") dataset **1990 CHAS Data Book 10/14/01**
- American Housing Survey data
Indicate year:

Other housing market study

Indicate year:

Other sources: (list and indicate year of information)

Market Study for the Fort Myers Housing Authority, December, 1999, by National Facility Consultants, Inc., on file at the main office of the FMHA.

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/>	Section 8 tenant-based assistance		
<input checked="" type="checkbox"/>	Public Housing		
<input type="checkbox"/>	Combined Section 8 and Public Housing		
<input type="checkbox"/>	Public Housing Site-Based or sub-jurisdictional waiting list (optional)		
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	1251		133
Extremely low income <=30% AMI	1086	86%	
Very low income (>30% but <=50% AMI)	138	12%	
Low income (>50% but <80% AMI)	27	2%	
Families with children	928	74%	
Elderly families	88	7%	
Families with Disabilities	82	7%	
Race/ethnicity European/American	77	6%	
Race/ethnicity African American	664	53%	
Race/ethnicity Hispanic	409	33%	
Race/ethnicity	101	8%	

Housing Needs of Families on the Waiting List			
Hatian			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	452	36%	31
2 BR	428	34%	39
3 BR	280	22%	37
4 BR	75	6%	19
5 BR	11	1%	5
5+ BR	5	1%	2
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

C. Strategy for Addressing Needs

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

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

Select all that apply

- Employ effective maintenance and management policies to minimize the number of public housing units off-line
- Reduce turnover time for vacated public housing units
- Reduce time to renovate public housing units
- Seek replacement of public housing units lost to the inventory through mixed finance development
- Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources
- Maintain or increase section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction
- Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required

- Maintain or increase section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- Maintain or increase section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program
- Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- Other (list below)

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select all that apply

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

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

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

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

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

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

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

Select if applicable

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

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

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

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

(2) Reasons for Selecting Strategies

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

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

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

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

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2004 grants)		
a) Public Housing Operating Fund	2,474,393	
b) Public Housing Capital Fund	1,649,902	
c) HOPE VI Revitalization	0	
d) HOPE VI Demolition	0	
e) Annual Contributions for Section 8 Tenant-Based Assistance	0	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	0	
g) Resident Opportunity and Self-Sufficiency Grants	79,307	
h) Community Development Block Grant	0	
i) HOME	0	
Other Federal Grants (list below)		

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
2. Prior Year Federal Grants (unobligated funds only) (list below)		
CFP FFY 2004	1,319,922	
CFP FFY 2003	344,334	
3. Public Housing Dwelling Rental Income	1,214,160	
4. Other income (list below)		
4. Non-federal sources (list below)		
Total resources	7,082,018	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.7 9 (c)]

A. Public Housing

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

(1) Eligibility

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

- When families are within a certain number of being offered a unit: (state number)
- When families are within a certain time of being offered a unit: (state time)
- Other: (describe) **At the time of application**

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

- Criminal or Drug-related activity

- Rental history
- Housekeeping
- Other (describe)

- c. Yes No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- d. Yes No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- e. Yes No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

(2)Waiting List Organization

- a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)

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

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

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

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

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

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

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

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

- PHA main administrative office
- All PHA development management offices
- Management offices at developments with site-based waiting lists

- At the development to which they would like to apply
- Other (list below)

(3) Assignment

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

- One
- Two
- Three or More

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

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

(4) Admissions Preferences

a. Income targeting:

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

b. Transfer policies:

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

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

The HACFM has a policy on transfers

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

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

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

- 1 Date and Time
- 1 Working Families
- 2 Victims of Domestic Violence

Former Federal preferences:

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families

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

4. Relationship of preferences to income targeting requirements:

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

(5) Occupancy

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

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

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

(select all that apply)

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

(6) Deconcentration and Income Mixing

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

is complete. If yes, list these developments as follows:

Deconcentration Policy for Covered Developments

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))
None			

DECONCENTRATION OF POVERTY AND INCOME-MIXING

The HACFM does not have site-based waiting lists. It has one waiting list for all public housing developments. The admission policy randomly mixes higher income tenants into lower income projects and lower income tenants into higher income projects, providing deconcentration of poverty and income-mixing.

Gross annual income is used for income limits at admission and for income-mixing purposes.

Skipping of a family on the waiting list specifically to reach another family with a lower or higher income is not to be considered an adverse action to the family. Skipping can be uniformly applied until the target threshold is met.

The PHA uses gathered tenant income information in its assessment of public housing developments to determine the appropriate designation to be assigned to the project for the purpose of assisting the HACFM in its deconcentration goals.

Deconcentration and Income-Mixing Goals

Admission policies related to the deconcentration efforts of the HACFM do not impose specific quotas. Therefore, the HACFM will not set specific quotas, but will strive to achieve deconcentration and income-mixing in its developments through its random admissions policy based upon a single waiting list.

Project Designation Methodology

The HACFM determines and compares tenant incomes at all of its family PH developments. On analyzing its findings, the HACFM will apply the policies, measures and incentives listed herein to bring higher income families into lower income developments and lower income families into higher income developments.

Our goal is to have eligible families with higher incomes occupy dwelling units in projects occupied predominantly by eligible families having lower incomes, and eligible families with lower incomes occupy dwelling units in projects predominantly occupied by eligible families having higher incomes. The waiting list statistics indicate there are sufficient extremely low income and very low income persons to balance incomes in developments designated higher income developments.

The HACFM uses the “Aggregate Average Method” to achieve its deconcentration objectives. The HACFM reviews the annual resident income of all of its sites. Using the incomes of all families in all developments as a baseline, the HACFM then determines the average income of all of its resident families, by development. This information is kept on file in the HACFM. The HACFM will designate higher income developments those with average income above the aggregate average. The HACFM will designate lower income developments those with average income below the aggregate average.

The Housing Authority of the City of Fort Myers has three family developments, namely Michigan Family, Southward and Palmetto Court.

The average unadjusted income for all of these family HACFM Public Housing developments is \$8,753. The average unadjusted income for Michigan Family compares at 91.5 % to the total average income for all developments; Southward compares at 98.9% ; and Palmetto compares at 110.2%; all three being well within the HUD guidelines.

UNITS		PERCENT	
327	Michigan	91.5%	
198	Southward	98.9%	
96	Palmetto	110.2%	
612	Total Avg. Unadjusted Income	\$8,7534	T

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

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

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

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

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

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

Other (list policies and developments targeted below)

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

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

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

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

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

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

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

B. Section 8

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

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

(1) Eligibility

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

(2) Waiting List Organization

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

(3) Search Time

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

If yes, state circumstances below:

(4) Admissions Preferences

- a. Income targeting

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

- b. Preferences

1. Yes No: Has the PHA established preferences for admission to section 8 tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent **(5) Special purpose section 8 assistance programs**)
2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences

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

Other preferences (select all that apply)

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

Other preference(s) (list below)

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

Date and Time

Former Federal preferences

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

Victims of domestic violence

Substandard housing

Homelessness

High rent burden

Other preferences (select all that apply)

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

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

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

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

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

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

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

- For the earned income of a previously unemployed household member
- For increases in earned income
- Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

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

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

e. Ceiling rents

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

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

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

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

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

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

f. Rent re-determinations:

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

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

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

(2) Flat Rents

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

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

Market Study and Rent Analysis

B. Section 8 Tenant-Based Assistance

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

(1) Payment Standards

Describe the voucher payment standards and policies.

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

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

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

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

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

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

Other (list below)

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

Annually

Other (list below)

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

Success rates of assisted families

Rent burdens of assisted families

Other (list below)

(2) Minimum Rent

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

\$0

\$1-\$25

\$26-\$50

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

5. Operations and Management

[24 CFR Part 903.7 9 (e)]

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

A. PHA Management Structure

Describe the PHA's management structure and organization.

(select one)

An organization chart showing the PHA's management structure and organization is attached.

A brief description of the management structure and organization of the PHA follows:

The HACFM is governed by a 7 member board appointed by the Mayor of the City of Fort Myers. The Board hires a full-time executive director who manages the Authority's day to day operations.

B. HUD Programs Under PHA Management

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

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	961 units	386 units
Section 8 Vouchers		
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers (list individually)		
Public Housing Drug Elimination Program (PHDEP)		
Other Federal Programs(list individually)		
FSS Program	22 – 30 Families	5 – 10 families
Capital Fund Program	961 units	386 units
Ross Elderly Service Coordinator program	322 units	90 units

C. Management and Maintenance Policies

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

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

HACFM Admissions and Occupancy Policy Manual
HACFM Maintenance Policy

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

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

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

A. Public Housing

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

If yes, list additions to federal requirements below:

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

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

B. Section 8 Tenant-Based Assistance

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

If yes, list additions to federal requirements below:

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

- PHA main administrative office
 Other (list below)

7. Capital Improvement Needs

[24 CFR Part 903.7 9 (g)]

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

A. Capital Fund Activities

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

(1) Capital Fund Program Annual Statement

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

Select one:

The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name) fl047a01

-or-

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

(2) Optional 5-Year Action Plan

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

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

b. If yes to question a, select one:

The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state name) fl047a01

-or-

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

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

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

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

1. Development name:

2. Development (project) number:

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

Revitalization Plan under development

Revitalization Plan submitted, pending approval

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

Yes No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?
 If yes, list development name/s below:
Michigan Court and Flossie M. Riley Garden Apartments

Yes No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?
 If yes, list developments or activities below:
New construction as part of HOPE VI for Michigan Court and Flossie M. Riley Garden Apartments; and from affordable housing rental tax credit for all public housing developments

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

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

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

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

2. Activity Description

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

Demolition/Disposition Activity Description
1a. Development name: Royal Palm Towers
1b. Development (project) number: FL 047-004
2. Activity type: Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one)

Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date application approved, submitted, or planned for submission: <u>(30/06/05)</u>
5. Number of units affected: 101
6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 01/06 b. Projected end date of activity: 01/07

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

[24 CFR Part 903.7 9 (i)]

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

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

2. Activity Description

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

Designation of Public Housing Activity Description
1a. Development name: Bonair Towers
1b. Development (project) number: fl047-002
2. Designation type: Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>

<p>3. Application status (select one)</p> <p>Approved; included in the PHA's Designation Plan <input checked="" type="checkbox"/></p> <p>Submitted, pending approval <input type="checkbox"/></p> <p>Planned application <input type="checkbox"/></p>
<p>4. Date this designation approved, submitted, or planned for submission: <u>(27/01/03)</u></p>
<p>5. If approved, will this designation constitute a (select one)</p> <p><input checked="" type="checkbox"/> New Designation Plan</p> <p><input type="checkbox"/> Revision of a previously-approved Designation Plan?</p>
<p>6. Number of units affected: 101</p> <p>7. Coverage of action (select one)</p> <p><input type="checkbox"/> Part of the development</p> <p><input checked="" type="checkbox"/> Total development</p>

Designation of Public Housing Activity Description
<p>1a. Development name: ROYAL PALM TOWERS</p> <p>1b. Development (project) number: fl047-004</p>
<p>2. Designation type:</p> <p>Occupancy by only the elderly <input checked="" type="checkbox"/></p> <p>Occupancy by families with disabilities <input type="checkbox"/></p> <p>Occupancy by only elderly families and families with disabilities <input type="checkbox"/></p>
<p>3. Application status (select one)</p> <p>Approved; included in the PHA's Designation Plan <input checked="" type="checkbox"/></p> <p>Submitted, pending approval <input type="checkbox"/></p> <p>Planned application <input type="checkbox"/></p>
<p>4. Date this designation approved, submitted, or planned for submission: <u>(27/01/03)</u></p>
<p>5. If approved, will this designation constitute a (select one)</p> <p><input checked="" type="checkbox"/> New Designation Plan</p> <p><input type="checkbox"/> Revision of a previously-approved Designation Plan?</p>
<p>6. Number of units affected: 101</p> <p>7. Coverage of action (select one)</p> <p><input type="checkbox"/> Part of the development</p> <p><input checked="" type="checkbox"/> Total development</p>

Designation of Public Housing Activity Description
<p>1a. Development name: FLOSSIE M.RILEY GARDEN APARTMENTS</p> <p>1b. Development (project) number: FL047-006</p>
<p>2. Designation type:</p> <p>Occupancy by only the elderly <input checked="" type="checkbox"/></p> <p>Occupancy by families with disabilities <input type="checkbox"/></p> <p>Occupancy by only elderly families and families with disabilities <input type="checkbox"/></p>
<p>3. Application status (select one)</p>

Approved; included in the PHA's Designation Plan <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <u>(27/01/03)</u>
5. If approved, will this designation constitute a (select one) <input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
7. Number of units affected: 120 7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

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

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

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

2. Activity Description

- Yes No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If "yes", skip to component 11. If "No", complete the Activity Description table below.

Conversion of Public Housing Activity Description
1a. Development name:
1b. Development (project) number:
2. What is the status of the required assessment? <input type="checkbox"/> Assessment underway <input type="checkbox"/> Assessment results submitted to HUD <input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question) <input type="checkbox"/> Other (explain below)

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

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

Voluntary Conversion Initial Assessments

- a. How many of the PHA's developments are subject to the Required Initial Assessments? **3**
- b. How many of the PHA's developments are not subject to the Required Initial Assessments based on exemptions (e.g., elderly and/or disabled development not general occupancy projects)? **3**
- c. How many Assessments were conducted for the PHA's covered developments? **3**
- d. Identify PHA developments that may be appropriate for conversion based on the Required Initial Assessments:
None were identified at this time as appropriate for conversion without additional upgrading of the facilities to be market comparable.

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Development Name	Number of Units
None	

e. If the PHA has not completed the Required Initial Assessments, describe the status of these assessments.

The three completed assessments are on file at the HACFM main office.

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

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

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

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

NOTE: As part of a forthcoming HOPE VI application to be submitted to HUD during FY2005, the HACFM is contemplating administering a Public Housing Homeownership Program in Michigan Court and Flossie M. Riley.

2. Activity Description

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

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

B. Section 8 Tenant Based Assistance

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

2. Program Description:

a. Size of Program

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

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

- 25 or fewer participants
 26 - 50 participants
 51 to 100 participants
 more than 100 participants

b. PHA-established eligibility criteria

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

If yes, list criteria below:

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (1)]

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

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

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

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

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

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

B. Services and programs offered to residents and participants

(1) General

a. Self-Sufficiency Policies

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

- Public housing rent determination policies
- Public housing admissions policies
- Section 8 admissions policies

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

b. Economic and Social self-sufficiency programs

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

Services and Programs				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)
<i>Elderly Services Coordinator</i>	<i>322</i>	<i>All elderly Public Housing residents</i>	<i>On site, full time coordinator</i>	<i>Public Housing participants</i>

(2) Family Self Sufficiency program/s

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2000 Estimate)	Actual Number of Participants (As of: 31/10/04)

Public Housing	33 families	21 families
Section 8		

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

C. Welfare Benefit Reductions

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

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

During FY 2004, the Housing Authority of the City of Fort Myers undertook the following activities per the newly adopted HUD regulations changing the requirements of the Community Service program and making it again non-voluntary for eligible resident participation:

IN-HOUSE PROGRAM DEVELOPMENT AND STAFF TRAINING

- Held training classes for staff, including Development Managers, to review HUD regulations on involuntary eligible resident participation in the program. Trained staff how to respond to questions from residents.

- Notified residents through certified letters of HUD’s newly adopted regulations making the program non-voluntary for eligible residents.
- Drafted and posted appropriate Public Notices on the regulations concerning the Community Service Program to inform all Residents throughout the Housing Authority developments.
- Placed the item on the agenda of Resident Council Meetings to give residents an opportunity to understand the HUD regulations making the program non-voluntary.
- HA provided tracking of service for participating residents.
- Reviewed with residents the internal filing system and reporting system so Housing Managers can regularly track and verify completion of any community service programs completed by residents who must participate in the program.
- Maintained a listing from the Volunteer Center of Lee County of non-profits in the Fort Myers area who are willing to participate in offering community service activities to residents who participate. The Senior Friendship Centers of Lee County and the United Way of Lee County also assist participating residents.
- Reviewed the lease to ensure compliance with new CS requirements
- Prepared an article on the changes in the Community Service Program for the Newsletter to inform all residents about the program.

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.7 9 (m)]

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

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

1. Describe the need for measures to ensure the safety of public housing residents (select all that apply)

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

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

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

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

Michigan Court, Palmetto Court, and Southward Village

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

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

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

PHAS Component # 4 - Drug Prevention and/or Crime Reduction Program Goals

Goal # 1 To Provide on-site drug prevention programming for children 6-18 years of age for one year.

- Task # 1 The Boys and Girls Clubs of Lee County, Inc. will provide summer camp programming that includes drug prevention programming for 30 children from the ages of 7-16. Registration List will be used for confirmation of participation.
- Task # 2 Girl Power
- Task # 3 Kids Correct
- Task # 4 Youth Sports Program

Goal # 2 To provide drug prevention programming for adults for one year.

- Task # 1 Implementation of “Dare to be You” which is a 12 week course that provides science based prevention programming that will increase parental efficiency; increase nurturing family management styles; increase social support systems; increase self-sufficiency; increase the knowledge of child development; increase the parents’ ability to provide the environment to develop self-concept, self-responsibility, communication and problem solving skills in their children. The program will serve 12-15 families. Pre and post enrollment testing as per the DARE Curriculum will be used for evaluation of program achievement.
- Task # 2 Mommie and Me

Goal # 3 To encourage residents to participate in crime prevention strategies undertaken by the Housing Authority

- Task # 1 To work with the crime practitioner at the Fort Myers Housing Authority to set up a neighborhood watch program at Flossie Riley and Palm Towers.

Goal # 4 To implement on-site community policing strategies to facilitate crime reduction at all public housing developments.

- Task # 1 The lease enforcement staff and property managers will fill out a form that will be required for each incident. The forms will be submitted to the Director of Housing on a weekly basis by no later than Monday afternoon from the previous week.
- Task # 2 The Fort Myers Police Department contracted staff and all property managers will meet on a monthly basis to discuss crime at each development. Meeting notes will be taken. The meeting will occur the 2nd Thursday of every month.
- Task # 3 Implementation of the Policeman next door program. 2 officers will live on-site at any of the public housing developments per year. Documentation will be the Courtesy Officer Agreement kept on file by the housing director.
- Task # 4 The Fort Myers Police Department contracted Police Officers attend the Resident Association meetings on a monthly basis. The sign-in sheet will be used as documentation of police officer attendance. Resident Association meetings are held once a month for each resident association.
- The Fort Myers Police Department liaison will provide to the Housing Director on a monthly basis the calls for service from the previous month. The Fort Myers Police Department will provide the data no later than the 15th of the subsequent month.

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

All Public Housing Developments

C. Coordination between PHA and the police

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

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

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

All developments are affected.

D. Additional information as required by PHDEP/PHDEP Plan

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

Note: This section does not apply.

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

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

The FMHA has adopted a pet policy covering all units, elderly and family. The policy (Section 18) is on file at the main office of the housing authority and does not apply to pets that are used to assist persons with disabilities. A summary of the main aspects of the policy are as follows:

- Pets are limited to domesticated dogs, cats, birds and fish in aquariums. The Housing Authority reserves the right to limit size and number. Animals deemed to be potentially harmful to health or safety of others will not be allowed (including attack or fight trained dogs – pit bulls). Residents in all units must register pets with the Community Services Bureau by submitting a Pet Registration Form with a photo of the pet. Owners must provide records to the Property Managers that pet is properly inoculated and licensed and also provide name and phone number of individual who will be responsible for the pet in event of resident absence or illness.
- A non-refundable security deposit of \$100 is required for elderly facilities. A non-refundable security deposit of \$250 is required for family developments, along with verification of a liability insurance policy covering the pet at time of registering the pet.
- Owners are liable for amount of all damages to FMHA caused by their pet. Owners shall be liable for entire amount of injury to person or property of other residents, staff or visitors caused by their pet and shall indemnify FMHA for all cost of litigation and attorney's fees resulting from damage.
- Owners must maintain pets in living quarters in manner to prevent odors and other unsanitary conditions in owner's unit and surrounding areas.
- Complaints regarding pets disturbing neighbors will result in owner having to remove the pet or owner eviction.
- Owners must keep pets in owner's apartment or on leash at all times when outside. No outdoor cages are allowed.
- Pets are allowed only on designated pet areas on the grounds. Owners must clean up after their pets and are responsible for disposing of pet waste. Animals are not allowed in common rooms or dining rooms and should be carried if possible in elevators.

- Pets cannot be left unattended on a lease connected to clotheslines, poles or any object outdoors.
- If work is to be done in a pet owners unit, the owner must either be home or arrange for pet to be contained or removed from the unit.

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

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

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

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

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

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

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

Other: (list below)

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

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

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

2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)

Attached at Attachment (File name)

Provided below:

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

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

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

Other: (list below)

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

1. Yes No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)

2. Yes No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)

3. Description of Resident Election Process

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

Candidates were nominated by resident and assisted family organizations

Candidates could be nominated by any adult recipient of PHA assistance

- Self-nomination: Candidates registered with the PHA and requested a place on ballot
- Other: (describe) **Appointed by Mayor of City of Fort Myers**

b. Eligible candidates: (select one)

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

c. Eligible voters: (select all that apply)

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

C. Statement of Consistency with the Consolidated Plan

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

1. Consolidated Plan jurisdiction: (provide name here) **CITY OF FORT MYERS**
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
 - The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
 - The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
 - The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
 - Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
 - Other: (list below)
4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

The Consolidated Plan supports the PHA Plan by signing off on consistency with all Federal grants and by inviting PHA participation in planning process.

D. Other Information Required by HUD

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

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.

In accordance with PIH notice 99-51 (HA) issued December 14, 1999, PHA's must define "substantial deviation" of Annual Plans from the 5-Year Plan and "significant amendment or modification" of the Annual Plan. The Quality Housing and Work Responsibility Act of 1998 requires that PHA's explain "substantial deviation" from the 5-Year Plan in their Annual Plans. The Act also provides that, while PHAs may change or modify their plans or policies described in them, any "significant deviation" to the plan would require PHAs to submit a revised PHA plan that has met full public process requirements.

The Housing Authority of the City of Fort Myers' definition of "substantial deviation" of Annual Plans from the 5-Year Plan and "significant amendment or modification" of the Annual Plan will consider the following to be significant amendments or modifications:

CRITERIA FOR DETERMINING SUBSTANTIAL DEVIATION AND SIGNIFICANT AMENDMENT OR MODIFICATION:

The Housing Authority of the City of Fort Myers, after submitting its Annual Plan to HUD, may modify, amend or change any policy, rule, regulation or other aspect of its plan. If any item does not significantly change the Fort Myers Housing Authority's Mission Statement and Goals and Objectives, then it shall not be considered a substantial deviation from the Plan. If any modifications, amendments or changes in any policy, rule, regulation or other aspect of the plan are not inconsistent with the Fort Myers Housing Authority Mission Statement, its Goals and Objectives, or HUD regulations, then these shall not be deemed significant amendments or modifications to the Annual and 5-Year Plan.

- A substantial change in goals identified in the Five-Year Plan.

Significant Amendment/Modification:

- Significant modifications to major strategies to address housing needs and to major policies, such as policies governing eligibility, selection or admissions and rent determination. All significant modifications require full public process.

A. Substantial Deviation from the 5-year Plan: Based on 99-51, the Agency would like to have the ability to set funds in a line item where there were none.

B. Significant Amendment or Modification to the Annual Plan: None

2. Current Listing of the Board of Commissioners of the Housing Authority of the City of Fort Myers
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<u>Commissioner</u>	<u>Appointed</u>	<u>Term Ends</u>
Lemuel Teal, Chairman PO Box 746 Fort Myers, FL 33902	04/01/01	03/06/03
Bill Barnwell, Vice-Chairman Farmer's Market Restaurant 2736 Edison Ave Fort Myers, FL 33916	04/02/01	06/06/05
Peter Routsis-Arroyo, Commissioner Catholic Charaties Diocese of Venice, Inc. 1000 Pinebrook Road Venice, FL 34292	04/01/01	03/06/02
Joseph D'Alessandro, Commissioner PO Box 570 Fort Myers, FL 33902	09/15/03	03/06/07
Betty Cole McDonald, Commissioner H.A. Resident 4224 Michigan Avenue, #217 Fort Myers, FL 33916	04/01/01	03/06/05
E. Bruce Strayhorn, Commissioner Strayhorn & Strayhorn 2125 W. First Street, Suite 200 Fort Myers, FL 33901	03-07-98	03-06-02
Pastor Jonathan Gray, Commissioner Cornerstone Ministries 3220 Dr. Martin Luther King Jr., Blvd. Fort Myers, FL 33916	04/01/01 06/04	03/06/03

3. Current Listing of HACFM Resident Advisory Board Members, 2004
--

Mary Williams, President
3501 Dale Street, #C-13, Fort Myers, FL 33916

Ann English, Vice-President
4224 Michigan Ave., Fort Myers, FL 33916

Barbara Hall, Secretary
4258 Michigan Avenue, #1, Fort Myers, FL 33916

Carl Harper, Treasurer

Frances Sanders, Parliamentarian
4224 Michigan Ave #635, Fort Myers, FL 33916

4. ASSESSMENT OF DEMOGRAPHIC CHANGES IN PUBLIC HOUSING PROPERTIES WITH SITE-BASED WAITING LISTS
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This does not apply, as the Housing Authority of the City of Fort Myers does not have site-based waiting lists.

Attachments

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

Attachment files submitted electronically to HUD with this plan:

- (1) fl047a01 – Capital Fund Tables for PHA FY 2005 –2009
- (2) fl047b01 – P & E 09/30/04 for CFP FY 2004
- (3) fl047c01 – P & E 09/30/04 for CFP FY 2003
- (4) fl047d01 – P & E 09/30/04 for CFP FY 2003 (Bonus - **FL14PO47502-03**)

**PHA Plan
Table Library**

**Componetent 7
Capital Fund Program Annual Statement
Parts I, II, and II**

Annual Statement

Capital Fund Program (CFP) Part I: Summary

Capital Fund Grant Number:
FL14P04750105

FFY of Grant Approval: 2004
PHA FFY 2005
HOUSING AUTHORITY OF THE CITY OF FORT MYERS

X	Original Annual Statement	
Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	\$ 250,000
3	1408 Management Improvements	\$ 115,800
4	1410 Administration	\$ 50,223
5	1411 Audit	\$ -
6	1415 Liquidated Damages	\$ -
7	1430 Fees and Costs	\$ 32,000
8	1440 Site Acquisition	\$ -
9	1450 Site Improvement	\$ 95,000
10	1460 Dwelling Structures	\$ 990,315
11	1465.1 Dwelling Equipment-Nonexpendable	\$ 44,500
12	1470 Nondwelling Structures	\$ 38,264
13	1475 Nondwelling Equipment	\$ 33,800
14	1485 Demolition	\$ -
15	1490 Replacement Reserve	\$ -
16	1492 Moving to Work Demonstration	\$ -
17	1495.1 Relocation Costs	
18	1498 Mod Used for Development	-
19	1502 Contingency	\$ -
20	Amount of Annual Statement (Sum of lines 2-19)	\$ 1,649,902
21	Amount of line 20 Related to LBP Activities	\$ -
22	Amount of line 20 Related to Section 504 Compliance	\$ 3,264
23	Amount of line 20 Related to Security	-
24	Amount of line 20 Related to Energy Conservation Measures	\$ -

Annual Statement

Capital Fund Program (CFP) Part II: Supporting Table

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
FL047-001 Southward Village	Roofs	1460	\$ 194,569
	Flooring (50 Units)	1460	\$ 34,000
	Total FL47-001 Southward Village		\$ 228,569
FL047-002 Bonair Towers	A/C 2 Bedroom Apartments (10 units)	1460	\$ 5,500
	Reconnect A/C Drains	1460	\$ 3,000
	Elevator Modernization	1460	\$ 165,746
	Total FL47-003 Palmetto Court		\$ 174,246
FL047-003 Palmetto Court	Replace Bathroom Cabinets/Lavatories	1460	\$ 32,000
	Total FL47-003 Palmetto Court		\$ 32,000
FL047-004 Royal Palm Towers	A/C Drain Repair	1460	\$ 3,000
	Total FL047-004		\$ 3,000
FL047-006 Michigan Court	ADA/504 Compliance FMRGA/MC Admin	1470	\$ 3,264
	Total FL047-006		\$ 3,264
FL047 PHA WIDE	Operations	1406	\$ 250,000
	Computer software and support	1408	\$ 20,000
	Resident Initiatives	1408	\$ 30,000
	Operational Improvements	1408	\$ 10,000
	Training	1408	\$ 9,000
	Community/Internal Safety Program	1408	\$ 40,000
	HTVN	1408	\$ 6,800
	Moderinzation Coordinator	1410	\$ 23,300
	Modernization Office Clerk	1410	\$ 15,923
	Employee Benefits	1410	\$ 8,500
	Modernization Office Supplies	1410	\$ 2,500
	Architect 7 Engineer Fees	1430	\$ 30,000
	Project Costs	1430	\$ 2,000
	Landscaping	1450	\$ 35,000
	Security/Site Lighting	1450	\$ 15,000
	Recreational Facilities	1450	\$ 20,000
	Site Improvements	1450	\$ 25,000
	Interior/Exterior Painting	1460	\$ 140,000
	Leveraged Capital Funds	1460	\$ 412,500
	Appliances	1465	\$ 44,500
	Admin. Bldg. Renov.	1470	\$ 20,000
	Resident Community Areas	1470	\$ 15,000
	Modernization Crew Vehicles/Equipment	1475	\$ 23,800
Computer Equipment	1475	\$ 10,000	
Total PHA Wide		\$ 1,208,823	
	Capital Fund Program FFY2004 Total		\$ 1,649,902

Capital Fund Program Five-Year Action Plan PHA FY 2005-2009

Part I: Summary

PHA Name : Housing Authority of the City of Fort Myers Florida				<input checked="" type="checkbox"/>	Original 5-Year Plan - PHA FY 2005-2009				
				<input type="checkbox"/>					
Development Number/Name/HA-Wide	Year 1 - FFY 2004 PHA FY: 2005	Work Statement for Year 2 FFY Grant: 2005 PHA FY: 2006		Work Statement for Year 3 FFY Grant: 2006 PHA FY: 2007		Work Statement for Year 4 FFY Grant: 2007 PHA FY: 2008		Work Statement for Year 5 FFY Grant: 2008 PHA FY: 2009	
	Annual Statement								
FL47-001 Southward Village		\$	150,000	\$	169,000	\$	200,000	\$	350,000
FL47-003 Palmetto Court			-	\$	150,000	\$	150,000	\$	-
FL47-004 Royal Palm Towers		\$	178,264		-	\$	-	\$	-
FL47-006 Michigan Court			-		-		-		-
PHA Wide		\$	1,321,638	\$	1,330,902	\$	1,299,902	\$	1,299,902
CFP Funds Listed for 5-year planning		\$	1,649,902	\$	1,649,902	\$	1,649,902	\$	1,649,902
Replacement Housing Factor Funds									

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

Activities for Year 1	Activities for Year: <u>2</u> FFY Grant: 2005 PHA FY: 2006			Activities for Year: <u>3</u> FFY Grant: 2005 PHA FY: 2007		
See	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
Annual	FL47-001 Southward Village	Roofs	\$ 150,000	FL47-001 Southward Village	Roofs	\$ 169,000
Statement	FL47-004 Royal Palm Tower	Replace Bathroom Lavatories	\$ 15,000	FL47-003 Palmetto Court	Site Drainage	\$ 150,000
	FL47-004 Royal Palm Tower	Elevator Modernization	\$ 163,264	PHA Wide	Operations	\$ 250,000
	PHA Wide	Operations	\$ 250,000	PHA Wide	Leveraged Funds	\$ 412,500
	PHA Wide	Leveraged Funds	\$ 412,500	PHA Wide	Computer Software/Support	\$ 20,000
	PHA Wide	Computer Software/Support	\$ 20,000	PHA Wide	Resident Initiatives	\$ 30,000
	PHA Wide	Resident Initiatives	\$ 30,000	PHA Wide	Operational Improvements	\$ 10,000
	PHA Wide	Operational Improvements	\$ 10,000	PHA Wide	Training	\$ 9,000
	PHA Wide	Training	\$ 9,000	PHA Wide	Community/Internal Safety Program	\$ 40,000
	PHA Wide	Community/Internal Safety Program	\$ 40,000	PHA Wide	HTVN	\$ 6,800
	PHA Wide	HTVN	\$ 6,800	PHA Wide	Modernization Coord.	\$ 25,300
	PHA Wide	Modernization Coord.	\$ 24,300	PHA Wide	Modernization Office Clerk	\$ 16,923
	PHA Wide	Modernization Office Clerk	\$ 16,323	PHA Wide	Employee Benefits	\$ 8,600
	PHA Wide	Employee Benefits	\$ 8,500	PHA Wide	Modernization Office Supplies	\$ 2,500
	PHA Wide	Modernization Office Supplies	\$ 2,500	PHA Wide	Architect & Engineering Fees	\$ 30,000
	PHA Wide	Architect & Engineering Fees	\$ 30,000	PHA Wide	Project Costs	\$ 2,000
	PHW Wide	Project Costs	\$ 2,000	PHW Wide	Landscaping	\$ 40,000
	PHW Wide	Landscaping	\$ 40,000	PHW Wide	Security & Site Lighting	\$ 15,000
	PHW Wide	Security & Site Lighting	\$ 15,000	PHW Wide	Recreational Facilities	\$ 55,000
	PHW Wide	Recreational Facilities	\$ 55,000	PHW Wide	Site Improvement	\$ 100,000
	PHW Wide	Site Improvement	\$ 100,000	PHW Wide	Int/Ext Painting	\$ 122,000
	PHW Wide	Int/Ext Painting	\$ 122,000	PHW Wide	Appliances	\$ 50,000
	PHW Wide	Appliances	\$ 50,000	PHW Wide	Admin Bldg Renov	\$ 50,000
	PHW Wide	Admin Bldg Renov	\$ 50,000	PHW Wide	Resident Community Areas	\$ 25,279
	PHW Wide	Resident Community Areas	\$ 17,715	PHW Wide	Computer Equipment	\$ 10,000
	PHW Wide	Computer Equipment	\$ 10,000			
	Total CFP Estimated Cost		\$ 1,649,902			\$ 1,649,902

CAPITAL FUND PROGRAM TABLES START HERE

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Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47501-04 Replacement Housing Factor Grant No:		Federal FY of Grant: 2004	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 9/30/2004 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	329,980.00		329,980.00	329,980.00
3	1408 Management Improvements	139,067.00		0	0
4	1410 Administration	50,222.00		0	0
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	32,000.00		0	0
8	1440 Site Acquisition				
9	1450 Site Improvement	190,000.00		0	0
10	1460 Dwelling Structures	789,833.00		0	0
11	1465.1 Dwelling Equipment—Nonexpendable	50,000.00		0	0
12	1470 Nondwelling Structures	35,000.00		0	0
13	1475 Nondwelling Equipment	33,800.00		0	0
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collaterization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	1,649,902.00		329,980.00	329,980.00
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				

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

PHA Name: The Housing Authority of the City of Fort Myers	Grant Type and Number Capital Fund Program Grant No: FL14PO47501-04 Replacement Housing Factor Grant No:	Federal FY of Grant: 2004
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending: 9/30/2004
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
25	Amount of Line 21 Related to Security – Hard Costs				
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: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47501-04 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL 047-001 Southward Village	Flooring	1460		34,000.00				
FL 047-001 Southward Village	Electric Meter Can Upgrades	1460		80,000.00				
FL 047-001 Southward Village	Sewer Rejuvenation	1460		44,169.00				
FL 047-001 Southward Village	Roofs			110,400.00				
FL 047-003 Palmetto Court	Electric Meter Can Upgrades	1460		45,000.00				
FL 047-006 Michigan Family & Flossie Riley	Unit Mod/ Family (100 units)	1460		80,000.00				
FL 047-006 Michigan Family & Flossie Riley	Security Windows (FMRGA)	1460		3,264.00				
FL 047-006 Michigan Family & Flossie Riley	Sewer Rejuvenation (FMRGA)	1460		20,000.00				
FL 047-006 Michigan Family & Flossie Riley	Sewer Rejuvenation (MC Family)	1460		78,000.00				
FL 047-006 Michigan Family & Flossie Riley	Electric Meter Can Upgrades	1460		75,000.00				
PHA Wide	Operations	1406		329,980.00		329,980.00	329,980.00	
PHA Wide	Computer Software/Support	1408		43,267.00				
PHA Wide	Resident Initiatives	1408		30,000.00				
PHA Wide	Operational Improvements	1408		10,000.00				
PHA Wide	Training	1408		9,000.00				
PHA Wide	Comm/Internal Safety Prog	1408		40,000.00				
PHA Wide	HTVN	1408		6,800.00				
PHA Wide	Modernization Coordinator	1410		23,300.00				
PHA Wide	Modernization Office Clerk	1410		15,922.00				
PHA Wide	Employee Benefits	1410		8,500.00				
PHA Wide	Mod Office Supplies	1410		2,500.00				

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

Part II: Supporting Pages

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47501-04 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA Wide	Fees & Costs	1430		30,000.00				
PHA Wide	Project Costs	1430		2,000.00				
PHA Wide	Landscaping	1450		40,000.00				
PHA Wide	Security/Site Lighting	1450		25,000.00				
PHA Wide	Recreational Facilities	1450		25,000.00				
PHA Wide	Site Improvement	1450		100,000.00				
PHA Wide	Interior/Exterior Painting	1460		140,000.00				
PHA Wide	Prep Units	1460		80,000.00				
PHA Wide	Appliances	1465		50,000.00				
PHA Wide	Admin Bldg Renovations	1470		20,000.00				
PHA Wide	Resident Common Areas	1470		15,000.00				
PHA Wide	Mod Crew Vehicles/Equip	1475		23,800.00				
PHA Wide	Computer Equipment	1475		10,000.00				

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

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program No: FL14PO47501-04 Replacement Housing Factor No:					Federal FY of Grant: 2004	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates	
	Original	Revised	Actual	Original	Revised	Actual		
FL 047-001 Southward Village	April 06							
FL 047-003 Palmetto Court	April 06							
FL 047-006 Michigan Court	April 06							
PHA Wide	1406	April 06						
	1408	April 06						
	1410	April 06						
	1430	April 06						
	1450	April 06						
	1460	April 06						
	1465	April 06						
	1470	April 06						
	1475	April 06						

CAPITAL FUND PROGRAM TABLES START HERE

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Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47501-03 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 9/30/2004 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	200,000.00	281,331.00	281,331.00	281,331.00
3	1408 Management Improvements	120,600.00	251,600.00	197,610.65	182,565.83
4	1410 Administration	59,050.00	140,665.00	137,851.76	133,200.96
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	32,000.00	32,000.00	8,677.41	4,901.41
8	1440 Site Acquisition				
9	1450 Site Improvement	108,368.00	145,269.15	39,019.99	37,953.83
10	1460 Dwelling Structures	796,638.00	450,790.85	413,334.30	411,212.62
11	1465.1 Dwelling Equipment—Nonexpendable	45,000.00	50,000.00	43,428.00	43,428.00
12	1470 Nondwelling Structures	35,000.00	35,000.00	4,260.97	3,835.87
13	1475 Nondwelling Equipment	10,000.00	20,000.00	15,482.59	15,482.59
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collaterization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	1,406,656.00	1,406,656.00	1,140,996.67	1,113,912.11
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				

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

PHA Name: The Housing Authority of the City of Fort Myers	Grant Type and Number Capital Fund Program Grant No: FL14PO47501-03 Replacement Housing Factor Grant No:	Federal FY of Grant: 2003
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending: 9/30/2004
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
25	Amount of Line 21 Related to Security – Hard Costs				
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: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47501-03 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
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	
FL 047-001 Southward Village	Flooring	1460		25,000.00	60,000.00	60,000.00	58,815.07	In progress
FL 047-001 Southward Village	Roofs	1460		200,000.00	0			
FL 047-002 Bonair Towers	Elevator Moderization	1460		130,000.00	0			
FL 047-003 Palmetto Court	Flooring	1460		10,000.00	55,000.00	55,000.00	55,000.00	Completed
FL 047-003 Palmetto Court	Electric Meter Can Upgrades	1460		45,000.00	0			
FL 047-006 Michigan Family & Flossie Riley	Unit Mod/ Family (100 units)	1460		80,000.00	59,152.85	59,152.85	59,152.85	Completed
FL 047-006 Michigan Family & Flossie Riley	Electric Meter Can Upgrades	1460		65,000.00	0			
FL 047-006 Michigan Family & Flossie Riley	Flooring (FMRGA)	1460		25,000.00	40,000.00	2,543.45	1,606.70	In progress
PHA Wide	Operations	1406		200,000.00	281,331.00	281,331.00	281,331.00	Completed
PHA Wide	Computer Software/Support	1408		20,000.00	20,000.00	2,471.28	2,471.28	In progress
PHA Wide	Resident Initiatives	1408		30,000.00	60,000.00	39,562.84	32,752.59	In progress
PHA Wide	Operational Improvements	1408		15,000.00	75,000.00	148,163.95	139,929.38	In progress
PHA Wide	Training	1408		9,000.00	20,000.00	1,112.58	1,112.58	In progress
PHA Wide	Comm/Internal Safety Prog	1408		40,000.00	70,000.00	0	0	
PHA Wide	HTVN	1408		6,600.00	6,600.00	6,300.00	6,300.00	Completed
PHA Wide	Modernization Coordinator	1410		22,300.00	52,300.00	49,486.76	45,366.76	In progress
PHA Wide	Modernization Office Clerk	1410		15,323.00	30,323.00	30,323.00	31,157.24	In progress
PHA Wide	Employee Benefits	1410		18,927.00	55,542.00	55,542.00	52,430.53	In progress
PHA Wide	Mod Office Supplies	1410		2,500.00	2,500.00	2,500.00	4,246.43	Completed
PHA Wide	Fees & Costs	1430		30,000.00	30,000.00	8,573.41	4,817.41	In progress
PHA Wide	Project Costs	1430		2,000.00	2,000.00	104.00	84.00	In progress
PHA Wide	Landscaping	1450		40,000.00	48,000.00	1,946.71	1,744.21	In progress
PHA Wide	Security/Site Lighting	1450		15,000.00	25,000.00	18,906.73	18,748.07	In progress

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

Part II: Supporting Pages

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47501-03 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003			
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	
PHA Wide	Recreational Facilities	1450		25,000.00	33,902.15	9,936.18	9,936.18	In progress
PHA Wide	Site Improvement	1450		28,368.00	38,367.00	8,230.37	7,525.37	In progress
PHA Wide	Interior/Exterior Painting	1460		141,638.00	151,638.00	151,638.00	151,638.00	Completed
PHA Wide	Prep Units	1460		75,000.00	85,000.00	85,000.00	85,000.00	Completed
PHA Wide	Appliances	1465		45,000.00	50,000.00	43,428.00	43,428.00	In progress
PHA Wide	Admin Bldg Renovations	1470		20,000.00	20,000.00	3,990.73	3,565.63	In progress
PHA Wide	Resident Common Areas	1470		15,000.00	15,000.00	270.24	270.24	In progress
PHA Wide	Computer Equipment	1475		10,000.00	20,000.00	15,482.59	15,482.59	In progress

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

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program No: FL14PO47501-03 Replacement Housing Factor No:				Federal FY of Grant: 2003	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
FL 047-001 Southward Village	April 05						
FL 047-002 Bonair Towers	April 05						
FL 047-003 Palmetto Court	April 05						
FL 047-004 Royal Palm Towers	April 05						
FL 047-006 Michigan Court	April 05						
PHA Wide	1406	April 05					
	1408	April 05					
	1410	April 05					
	1430	April 05					
	1450	April 05					
	1460	April 05					
	1465	April 05					
	1470	April 05					
	1475	April 05					

CAPITAL FUND PROGRAM TABLES START HERE

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Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47502-03 Replacement Housing Factor Grant No:		Federal FY of Grant: 2003	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 9/30/2004 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	59,420.00		59,420.00	59,420.00
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	237,678.00		77,654.38	72,740.91
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 Collaterization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	297,098		137,074.38	132,160.91
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				

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

PHA Name: The Housing Authority of the City of Fort Myers	Grant Type and Number Capital Fund Program Grant No: FL14PO47502-03 Replacement Housing Factor Grant No:	Federal FY of Grant: 2003
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending: 9/30/2004
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

