

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

FINAL

**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: Osceola County Housing Authority

PHA Number: FL 201

PHA Fiscal Year Beginning: (mm/yyyy) October 1, 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 State government
- Public library (BVL, St. Cloud, Main-Kissimmee and Poinciana
- PHA website
- Other (list below)
 - Osceola County website – Osceola.org

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 Osceola County Public Housing Authority is to explore the feasibility and development of new housing programs and to continue to improve the quality of existing programs to meet the affordable housing needs, to foster economic independence and to improve the quality of life for Osceola County's residents.

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.

Goal: Explore new sources to increase availability of affordable housing to meet growing population needs.

- Apply for additional housing choice vouchers. 2005
- Develop or apply for an emergency voucher process, especially in response to hurricanes and other natural disasters. 2005
- Explore the expanded development of assisted living units. 2006
- Develop and implement the voucher home ownership program. 2005
- Review potential development of Family Self Sufficiency programs. 2006
- Identify and explore the feasibility of alternative housing programs including project-based HCV, transitional housing for homeless, foster care children over 18, and other special need populations. 2006-2009
- Evaluate the housing stock within the county to determine need for different types of shelters. 2006-2007
- Increase opportunities for roundtable discussions regarding housing needs and potential programs. 2005-2007

Goal: Improve quality of existing programs:

- Cross train staff to improve efficiency of operations. 2005-2009
- Continue to update hardware and software to increase speed and accuracy of processing paperwork through consultation with the IT Department. 2005-2006
- Continue to provide training on the software system, new HUD regulations and quality control. 2005-2006

- Continue to define and streamline procedures to handle incoming participants with portable vouchers. 2005-2006
- Develop strong team approach to assuring continuous quality control of housing programs. 2005-2009
- Continue to upgrade and standardize the quality of information provided to participants and landlords through the development of media presentations. 2005-2009
- Improve SEMAP score to top performer by 2006 and maintain high performance level.
- Update the PHA Administrative Plan and provide ongoing training. 2005

Goal: Improve community quality of life and economic vitality:

- Diversify job opportunities through strong partnership with Workforce, Florida Employment Service and temporary staffing agencies. 2005
- Improve public transportation options to increase mobility to work. 2006
- Distribute job information to housing program participants. 2006
- Encourage job training participation to improve employment opportunities. 2005

Goal: Ensure Equal Opportunity in Housing:

- Monitor housing choices to ensure mixed communities. 2005
- Outreach to landlords to increase participation in housing programs. 2006
- Continue to provide a strong Housing Quality Standards inspection team to assure clean, safe and decent affordable housing for program participants. 2005
- Explore shelter solutions for special needs populations such as homeless, foster children after age 18 and other transitional housing needs. 2006-2009

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.

Osceola County continues to grow rapidly and its housing costs are also escalating rapidly. This reflects the ability of the County to attract businesses and people. The County is seeking to upgrade the businesses opening in the area trying to attract higher paying jobs. This growth is also placing demands for more affordable housing for the working poor.

The Osceola County Housing Office has also seen a dramatic growth in the households it serves, moving from an original allocation in 2000 of 193 vouchers to over 1100 as of this fiscal year. This growth is due to the right of Voucher recipients from anywhere in the USA to move to anywhere else including Osceola and to bring their voucher with them – a process known as portability. OCHO anticipates this growth will continue at around 20 new families per month.

This Plan focuses on making changes that will attract more working families and thus assist in the business development mission of the County. One of these tools is to have selection preferences for working people and those who live in Osceola. Another is to develop a Family Self-Sufficiency Plan. Another is to introduce changes permitting working families to use their voucher for homeownership, a national priority of Congress and HUD. The Plan also focuses on improving the tools for managing the agency's growth. It has been a difficult 5 years for the agency but now that HUD has issued regulations and procedures which help agencies like Osceola's and with additional assistance, resources and new leadership, the Office expects to show marked improvement by the end of the first fiscal year in this new 5 Year Plan (2005-2006).

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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

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Attachments

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

Attachments:

- Attachment A: Administration Plan Revisions
- Attachment B: Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)
- Attachment C: PHA Management Organizational Chart
- Attachment D: Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- Attachment E: HCV Homeownership Capacity Statement

- Attachment F: Certifications
 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
√	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
√	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
√	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans
√	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
√	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
N/A	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
N/A	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
N/A	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
N/A	Schedule of flat rents offered at each public housing	Annual Plan: Rent

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	development <input type="checkbox"/> check here if included in the public housing A & O Policy	Determination
√	Section 8 rent determination (payment standard) policies <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
N/A	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
N/A	Public housing grievance procedures <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
√	Section 8 informal review and hearing procedures <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
N/A	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
N/A	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
N/A	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
N/A	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
N/A	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
N/A	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
N/A	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
N/A	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
√	Policies governing any Section 8 Homeownership program <input checked="" type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
N/A	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
N/A	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
N/A	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
N/A	The most recent Public Housing Drug Elimination Program (PHEDEP) semi-annual performance report for any open	Annual Plan: Safety and Crime Prevention

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	grant and most recently submitted PHDEP application (PHDEP Plan)	
√	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.

Table 1: Housing Problems

Household by Type, Income, & Housing Problem	Renters					Owners					Total Households
	Elderly 1 & 2 member households	Small Related (2 to 4)	Large Related (5 or more)	All Other Households	Total Renters	Elderly 1 & 2 member households	Small Related (2 to 4)	Large Related (5 or more)	All Other Households	Total Owners	
	(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)	(I)	(J)	
1. Household Income <=50% MFI	1,299	2,803	839	1,517	6,458	3,125	2,113	665	964	6,867	13,325
2. Household Income <=30% MFI	769	1,184	365	728	3,046	1,310	819	190	439	2,758	5,804
3. % with any housing problems	75.3	81.4	100	72.5	80	79.8	84.1	92.1	70.4	80.4	80.2
4. % Cost Burden >30%	75.3	81.1	95.9	72.5	79.3	79.8	80.5	84.2	70.4	78.8	79.1
5. % Cost Burden >50%	64.2	76.4	83.6	62.5	70.9	55	75.7	76.3	64.9	64.2	67.7
6. Household Income >30% to <=50% MFI	530	1,619	474	789	3,412	1,815	1,294	475	525	4,109	7,521
7. % with any housing problems	68.9	92	95.8	93	89.2	47.7	82.2	85.3	78.1	66.8	76.9
8. % Cost Burden >30%	68.9	90.5	85.2	93	87	47.7	81.1	76.8	78.1	65.5	75.2
9. % Cost Burden >50%	37.7	31.8	23	55.8	37	20.4	47.1	53.7	42.9	35.5	36.2
10. Household Income >50 to <=80% MFI	364	2,245	925	1,310	4,844	2,700	2,950	1,015	1,100	7,765	12,609
11. % with any housing problems	54.7	59.2	77.8	60.3	62.7	27.8	56.6	71.9	50.9	47.8	53.5
12. % Cost Burden >30%	51.9	49.2	44.3	58.8	51.1	27.8	53.9	44.3	50.9	43.1	46.2
13. % Cost Burden >50%	3.8	3.3	0	6.9	3.7	6.5	10.8	6.9	16.8	9.7	7.4
14. Household Income >80% MFI	670	4,200	870	2,600	8,340	4,645	15,875	3,525	2,645	26,690	35,030
15. % with any housing problems	24.6	12.7	38.5	8.5	15	8	14	27.8	19.5	15.3	15.2
16. % Cost Burden >30%	22.4	2.7	1.7	6	5.2	8	11.7	10.8	17.2	11.5	10
17. % Cost Burden >50%	0	0	0	0.4	0.1	1.2	0.9	1.7	1.7	1.1	0.9
18. Total Households	2,333	9,248	2,634	5,427	19,642	10,470	20,938	5,205	4,709	41,322	60,964
19. % with any housing problems	56.1	46.7	71.1	41.9	49.8	28.9	27	44	38.1	30.9	37
20. % Cost Burden >30	55	39.4	44.8	40.3	42.2	28.9	24.6	26	36.8	27.3	32.1
21. % Cost Burden >50	30.3	16.2	15.7	18.3	18.4	12.6	8.1	10.2	15.7	10.4	12.9

Table 2: Housing Affordability Mismatch

Housing Units by Affordability	Renters Units by # of bedrooms				Owned or for sale units by # of bedrooms				
	0-1	2	3+	Total		0-1	2	3+	Total
	(A)	(B)	(C)	(D)		(E)	(F)	(G)	(H)
1. Rent <= 30%					Value <=30%				
# occupied units	390	445	480	1,315		N/A	N/A	N/A	N/A
%occupants <=30%	62.8	32.6	19.8	36.9		N/A	N/A	N/A	N/A
%built before 1970	7.4	22.5	25	18.9		N/A	N/A	N/A	N/A
%some problem	26.9	15.7	11.5	17.5		N/A	N/A	N/A	N/A
#vacant for rent	15	40	45	100		N/A	N/A	N/A	N/A
2. Rent >30 to <=50%					Value <= 50%				
# occupied units	635	1,055	700	2,390		1,015	4,030	4,360	9,405
%occupants <=50%	63.8	49.8	39.3	50.4		37.4	32.5	23.4	28.8
%built before 1970	35.4	29.9	25.7	30.1		13.3	21.3	24.8	22.1
% some problem	55.1	47.4	45	48.7		18.2	12.2	5.8	9.9
#vacant for rent	65	220	235	520	#vacant for sale	60	200	90	350
3. Rent >50 to <=80%					Value >50 to <=80%				
# occupied units	3,410	5,625	3,360	12,395		615	3,990	15,875	20,480
%occupants <=80%	63.6	58.3	44.5	56		61.8	46.7	29.3	33.7
%built before 1970	13.3	11.6	11.3	12		19.2	22.4	7.4	10.7
%some problem	57.9	51.3	41.4	50.4		11.4	5.6	1.4	2.5
#vacant for rent	230	675	520	1,425	#vacant for sale	15	80	295	390
4. Rent >80%					Value >80%				
# occupied units	1,595	930	1,050	3,575		979	1,354	9,100	11,433
#vacant for rent	160	45	150	355	# vacant for sale	4	4	225	233

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

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	73	100%	
Extremely low income (<=30% AMI)	48	66%	
Very low income (>30% but <=50% AMI)	14	19%	
Low income (>50% but <80% AMI)	11	15%	
Families with children	67	92%	
Elderly families	0	0%	
Families with Disabilities (HOH)	0	0%	
Race/ethnicity: Caucasian/White	29	40%	
Race/ethnicity: African Amer./Black	11	15%	
Race/ethnicity: Latino/Hispanic	31	42%	
Race/ethnicity: Native American	2	3%	

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

If yes:

How long has it been closed (# of months)? Since 1998

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

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

C. Strategy for Addressing Needs

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

Within the five-year plan, it is expected that the Waiting List will be opened. Currently it has been closed since 1998. In May/June of 2005, the waiting list was updated and purged. Section 8 staff along with other programs are reviewing needs and intend to apply for additional housing vouchers due to the high need and high growth in Osceola County.

Osceola County is also working closely with the City of Kissimmee to use other state funding to address some of the housing needs of the community that may impact the waiting list. Older apartment complexes may apply for funding through the SHIP program for rehabilitation of older units.

The Housing Manager and Human Services Department Director are working with the county in the development of the Housing Element of next Comprehensive Plan due 2008.

Goal: Explore new sources to increase availability of affordable housing to meet growing population needs.

- Apply for additional housing choice vouchers due to the high growth of the area and the number of portables that could be absorbed. 2005-2006
 - 1) Determine number of voucher holders that have ported and remained in the area of two years or more.
 - 2) Initiate discussion with HUD about adding vouchers to Osceola rather than remaining as a portable.
- Develop or apply for an emergency voucher process, especially in response to hurricanes and other natural disasters. 2005-2006
 - 1) Continue discussions with Miami-HUD about necessity for emergency vouchers, especially if another hurricane or natural disaster occurs.
- Develop and implement the voucher home ownership program. 2005
 - 1) Develop workshop for Board of County Commissioners about home ownership program.
 - 2) Train key staff members on the program with OKM consultants.
 - 3) Notify voucher holders about new program.

- 4) Coordinate program with other financial opportunities such as SHIP.
- 5) Set goal of five (5) voucher holders to homeowners with 12 months of program implementation.
- Increase opportunities for roundtable discussions regarding housing needs and potential programs. 2005-2007
 - 1) Coordinate two open houses targeted to nonprofit community partners (school admin, nonprofit organizations, etc.) and to agencies that deal with housing (mortgage, lending, landlord, realty) to meet the new housing staff and provide input on housing programs.
 - 2) Continue to work with OKM Consultant and with Florida Housing Finance Corporation on types of affordable housing programs that match the needs of Osceola County.

Goal: Improve quality of existing programs:

- Cross train staff to improve efficiency of operations. 2005-2009
 - 1) Identify and train a minimum of two staff members on procedures for each operation to ensure consistency of operation.
- Continue to update hardware and software to increase speed and accuracy of processing paperwork through consultation with the IT Department. 2005-2006
 - 1) Meet with county's IT department to identify software glitches and/or training needs.
 - 2) Coordinate software improvements and training through IT Department and software vendor.
 - 3) Identify neighboring county using same system to develop additional networking.
 - 4) Annually identify hardware needs to build into budget planning process.
- Continue to provide training on the software system, new HUD regulations and quality control. 2005-2006
 - 1) Establish monthly training topics in-house on new regulations, software and quality control.
 - 2) Continue to send representatives to regional trainings when cost-effective and appropriate to program improvement.
- Continue to define and streamline procedures to handle incoming participants with portable vouchers. 2005-2006
 - 1) Refine tracking system to track portable vouchers holders for efficient and timely processing.
 - 2) Designate staff responsibilities to ensure tracking is completed within timeframe.
 - 3) Collect all outstanding Port-In costs from other PHAs.
- Develop strong team approach to assuring continuous quality control of housing programs. 2005-2009
 - 1) Continue to coordinate weekly meetings with housing staff to discuss current issues and develop team continuity.
 - 2) Maintain PIC records and minimize error rates.

- 3) Create inclusive environment where adequate communication both up and down is the norm.
 - 4) Work as a team to develop an agency that is a pride to employees, supervisors, the County and become a High Performer under HUD Guidelines by 2006-2007.
- Continue to upgrade and standardize the quality of information provided to participants and landlords through the development of media presentations. 2005-2009
 - 1) Update PowerPoint trainings for participants and landlords.
 - Improve SEMAP score to top performer by 2006 and maintain high performance level.
 - 1) Continue to target low scoring areas for improvement by developing action plan to address each indicator.
 - Update the PHA Administrative Plan and provide ongoing training. 2005
 - 1) Update the Administrative Plan by October 2005.
 - 2) Review twice a year for additional updates to match program changes and needs.
 - 3) Establish procedure to update Admin Plan as needed when new regulations are disseminated.

Goal: Improve community quality of life and economic vitality:

- Diversify job opportunities through strong partnership with Workforce, Florida Employment Service and temporary staffing agencies. 2005
 - 1) Housing Manager will set meeting with Workforce Florida representatives to discuss collaboration.
 - 2) Housing Manager will contact other related staffing agencies to identify and implement collaborative efforts.
- Encourage job training participation to improve employment opportunities. 2005
 - 1) Through collaborative efforts, encourage participants to access job training and employment opportunities.

Goal: Ensure Equal Opportunity in Housing:

- Monitor housing choices to ensure mixed communities. 2005
 - 1) Use GIS system to map housing choices.
- Continue to provide a strong Housing Quality Standards inspection team to assure clean, safe and decent affordable housing for program participants. 2005
 - 1) Purchase additional handheld equipment to standardize and improve efficiency of inspection paperwork.
- Explore shelter solutions for special needs populations such as homeless, foster children after age 18 and other transitional housing needs. 2006-2009
 - 1) Continue to collaborate with community partners, city and county planning departments, housing agencies to identify special housing needs and potential solutions.

(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 2005 grants)	N/A	
a) Public Housing Operating Fund	N/A	
b) Public Housing Capital Fund	N/A	
c) HOPE VI Revitalization	N/A	
d) HOPE VI Demolition	N/A	
e) Annual Contributions for Section 8 Tenant-Based Assistance	\$1,324,106	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	N/A	
g) Resident Opportunity and Self-Sufficiency Grants	N/A	
h) Community Development Block Grant	N/A	
i) HOME	N/A	
Other Federal Grants (list below)	N/A	
2. Prior Year Federal Grants (unobligated funds only)	N/A	

Financial Resources: Planned Sources and Uses		
Sources (list below)	Planned \$	Planned Uses
3. Public Housing Dwelling Rental Income	N/A	
4. Other income (list below)		
Portable Admin Fee - Estimated	\$438,600	HCV Administratio n
HAP Portable Payments	6,324,000	Landlord Payments
4. Non-federal sources (list below)		
Total resources		

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.

Not Applicable

(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)

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)

- 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.

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 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: 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) –
 - Sex Offender Status
- 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)
 - Current and prior address for tenant per the PHA records
 - Name and address of landlord for current and previous address

(2) Waiting List Organization

- a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (select all that apply)
- None
 - Federal public housing
 - 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)

Waiting list for Section 8 Tenant-based assistance is currently closed. During 2005-2006, we expect to open the waiting list. At that time, admission will be through the main PHA office.

(3) Search Time

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

If yes, state circumstances below:

- Extenuating circumstances such as hospitalization or a family emergency for an extended period of time, which has affected the family's ability to find a unit within the initial sixty-day period. Verification is required.
- The PHA is satisfied that the family has made a reasonable effort to locate a unit, including seeking the assistance of the PHA, throughout the initial sixty-day period. A completed search record is required.
- The family was prevented from finding a unit due to disability accessibility requirements or large size 5-bedroom unit requirement. The Search Record is part of the required verification.

(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)

See Attachment A for a revised preference system

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)
 - Involuntarily displaced from a dwelling unit in the County of Osceola by natural disaster, by fire or by government action.
 - Working head of household or working spouse (who has averaged 20 hours of work a week for at least six months), or a person 62 years old or older or a person unable to work because of the extent of their disability.
 - A legal resident of Osceola County or a person working in Osceola County an average of 20 hours a week or more or a person with a job offer to work in Osceola County with a minimum of 20 hours a week of work.
 - A victim of domestic violence who has been relocated and as verified by the police.
 - A veteran as verified by the Department of Veteran Affairs

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 by weighted score

#	Preference	Weight
1	Involuntarily displaced from a dwelling unit in the County of Osceola by natural disaster, by fire or by government action.	200
2	Working head of household or working spouse (who has averaged 20 hours of work a week for at least six months), or a person 62 years old or older or a person unable to work because of the extent of their disability	185
3	A legal resident of Osceola County or a person working in Osceola County an average of 20 hours a week or more or a person with a job offer to work in Osceola County with a minimum of 20 hours a week of work.	130
4	A victim of domestic violence who has been relocated and as verified by the police	81
5	A veteran as verified by the Department of Veteran Affairs	4
	Total Preference Points Possible	600

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.

Not Applicable

(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)

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)
 - HUD Budgetary Constraints

(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. Attachment C
- A brief description of the management structure and organization of the PHA follows:

B. HUD Programs Under PHA Management

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

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	N/A	
Section 8 ACC Vouchers	193	3%
Section 8 PORT INS	819	14%
Section 8 Mod Rehab	N/A	
Special Purpose Section 8 Certificates/Vouchers (list individually)	N/A	
Public Housing Drug Elimination Program (PHDEP)	NA	
Other Federal Programs (list individually)		

C. Management and Maintenance Policies

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

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

(2) Section 8 Management: (list below)

a. Section 8 Administrative Plan

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

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

A. Public Housing

Not Applicable

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.

Not Applicable

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)

-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)

-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.

Not Applicable

- Yes No: a) Has the PHA received a HOPE VI revitalization grant? (if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary)
- b) Status of HOPE VI revitalization grant (complete one set of questions for each grant)
1. Development name:
 2. Development (project) number:
 3. Status of grant: (select the statement that best describes the current status)
 - Revitalization Plan under development
 - Revitalization Plan submitted, pending approval
 - Revitalization Plan approved
 - Activities pursuant to an approved Revitalization Plan underway
- Yes No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?
If yes, list development name/s below:
- Yes No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?
If yes, list developments or activities below:

Yes No: e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?

If yes, list developments or activities below:

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.

Not Applicable

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

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.

Not Applicable

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

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

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

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

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

Not Applicable

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? <ul style="list-style-type: none"> <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) <ul style="list-style-type: none"> <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) <ul style="list-style-type: none"> <input type="checkbox"/> Units addressed in a pending or approved demolition application (date submitted or approved:) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved:) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved:) <input type="checkbox"/> Requirements no longer applicable: vacancy rates are less than 10 percent <input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units <input type="checkbox"/> Other: (describe below)

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

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

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

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

Not Applicable

1. Yes No: Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under section 5(h), the HOPE I program, or section 32 of the U.S. Housing Act of 1937 (42 U.S.C. 1437z-4). (If “No”, skip to component 11B; if “yes”, complete one activity description for each applicable program/plan, unless eligible to complete a streamlined submission due to **small PHA** or **high performing PHA** status. PHAs completing streamlined submissions may skip to component 11B.)
2. Activity Description
 Yes No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 12. If “No”, complete the Activity Description table below.)

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

B. Section 8 Tenant Based Assistance

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

The agency will undertake the planning of the program this year and if approved will implement it this year as well.

2. Program Description:

See Attachment E: HCV Homeownership Capacity Statement

- 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:

See Attachment E: HCV Homeownership Capacity Statement

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 has entered into a cooperative agreement with the TANF Agency, to share information and/or target supportive

services (as contemplated by section 12(d)(7) of the Housing Act of 1937)?

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

Our intention is to explore the creation of a cooperative Agreement this year.

- 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)

(2) Family Self Sufficiency program/s

It is the intention of the agency to examine the feasibility and appropriateness of commencing an FSS program this fiscal year.

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2005 Estimate)	Actual Number of Participants (As of: DD/MM/YY)
Public Housing		
Section 8		

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

If no, list steps the PHA will take below:

C. Welfare Benefit Reductions

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

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

Other: (list below)

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

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.7 9 (m)]

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

Not Applicable

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

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

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

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

- Safety and security survey of residents
- Analysis of crime statistics over time for crimes committed "in and around" public housing authority
- Analysis of cost trends over time for repair of vandalism and removal of graffiti
- Resident reports

- PHA employee reports
- Police reports
- Demonstrable, quantifiable success with previous or ongoing anticrime/anti drug programs
- Other (describe below)

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

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

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

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

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

C. Coordination between PHA and the police

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

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

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

D. Additional information as required by PHDEP/PHDEP Plan

PHAs eligible for FY 2005 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

Not Applicable

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 2005 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)]

Not Applicable

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?

The fiscal audit for 9/30/05 was done by vendors of BOCC. This audit will be provided to HUD as soon as the final audit is received by the County.

3. Yes No: Were there any findings as the result of that audit?

- Lack of fully developed internal control structure which includes written policies and procedures, methods of monitoring and follow-up of Section 8 Activities.

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.

Not Applicable

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 D: Comments of Resident Advisory Board or Boards and Public Hearing**
 - 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:
Used in development of goals and objectives for five-year plan.
 - 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)
- 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:

State of Florida

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)

As of the submission date for this Plan there has been no commitments made by the State.

D. Other Information Required by HUD

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

Attachments

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

- Attachment A: Administration Plan Revisions
- Attachment B: Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)
- Attachment C: PHA Management Organizational Chart
- Attachment D: Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- Attachment E: HCV Homeownership Capacity Statement
- Attachment F: Certifications (Provided Separately)
- Other (List below, providing each attachment name)

Attachment A: Administration Plan Revisions

With this PHA Plan submission, the Osceola County Housing Authority is amending its Housing Choice Voucher Administrative Plan. These amendments are essential at this time. The Administrative Plan is also undergoing a complete rewrite and when finished will be presented for approval.

Minimum Rent Payment

The Minimum Rent which a household shall pay in the program, shall be \$50 per month, effective 30 days after the approval of this PHA Plan or October 1st 2005, whichever occurs earlier.

Preferences

The need for tenant-based rental assistance in Osceola County exceeds the availability of funds for this purpose, and a housing choice voucher is a scarce resource which is in great demand. For the purpose of ordering the issuance of housing choice vouchers to those most in need and reflecting the priorities of the Osceola County Housing Authority, the local preferences described below are established.

A. Local Preferences

- Involuntarily displaced from a dwelling unit in the County of Osceola by natural disaster, by fire or by government action.
- Working head of household or working spouse (who has averaged 20 hours of work a week for at least six months), or a person 62 years old or older or a person unable to work because of the extent of their disability.
- A legal resident of Osceola County or a person working in Osceola County an average of 20 hours a week or more or a person with a job offer to work in Osceola County with a minimum of 20 hours a week of work.
- A victim of domestic violence who has been relocated and as verified by the police.
- A veteran as verified by the Department of Veteran Affairs

B. Ranking Preference

Priority 1 Involuntarily displaced from a dwelling unit in the County of Osceola by natural disaster, by fire or by government action.

Priority 2 Working head of household or working spouse (who has averaged 20 hours of work a week for at least six months), or person 62 years old or older or a person unable to work because of the extent of their disability

Priority 3 A legal resident of Osceola County or a person working in Osceola County an average of 20 hours a week or more or a person with a job offer to work in Osceola County with a minimum of 20 hours a week of work.

Priority 4 A victim of domestic violence who has been relocated and as verified by the police.

Priority 5 A veteran as verified by the Department of Veteran Affairs

It should be noted that the Osceola County Housing Authority reserves the right to skip applicants who are not Extremely Low Income (<30% of Median Income for the County) if and when it is apparent that the agency will not meet the minimum target of 75% of new voucher holders being Extremely Low Income for the agency's fiscal year. In this respect, any new applicant to the program using portability to move into Osceola County, shall be counted in terms of the targeting requirement. In addition, any household being admitted from Osceola's waiting list and using portability to move to another jurisdiction, shall not be counted in terms of the targeting requirement.

Preferences are assigned using a weighting table below. Applicants may have multiple preferences. All preference selections are made using this weighting system and if applicants have the same weight, then date and time are used to select (including any lottery allocated time, date and place). For those without any preferences, selections are made by date and time of application (including lottery allocated time, date and place).

The weighting table is:

#	Preference	Weight
1	Involuntarily displaced from a dwelling unit in the County of Osceola by natural disaster, by fire or by government action.	200
2	Working head of household or working spouse (who has averaged 20 hours of work a week for at least six months), or a person 62 years old or older or a person unable to work because of the extent of their disability	185
3	A legal resident of Osceola County or a person working in Osceola County an average of 20 hours a week or more or a person with a job offer to work in Osceola County with a minimum of 20 hours a week of work.	130
4	A victim of domestic violence who has been relocated and as verified by the police	81
5	A veteran as verified by the Department of Veteran Affairs	4
	Total Preference Points Possible	600

Attachment B: Most Recent Board-Approved Operating Budget

Section 8 Housing Fund 168

2004/2005 Adopted Budget

October through September

Account Number			FY 04/05
Org Key	Sub-Object	Description	Adopted Budget
1686168000	3315100	Hud Allocation	\$ 1,170,000
1686113000	3315101	Hud Admin Fees	130,000
1686113000	3315102	Hard To House Fees	3,750
1686113000	3315103	Audit Fees Earned	1,000
1686168000	3315200	Hud-Portables	3,486,918
1686113000	3315201	Portable Admin Fees	264,000
1686113000	3611000	Interest	
1686113000	3694000	Misc. Revenue - Reimbursements	
		Sub-Total Revenues	\$ 5,055,668
168113000	3899001	Less 5% For Reserves	(252,784)
168113000	3899002	Balance Brought Forward	342,841
		Total Revenues	\$ 5,145,725

Administration

1686113554	5120000	Regular Salaries And Wages	\$ 263,015
1686113554	5121000	Sick Leave Payoff	\$ 3,037
1686113554	5140000	Overtime	2,271
1686113554	5210000	FICA Taxes	20,556
1686113554	5220000	Retirement Contributions	25,439
1686113554	5230000	Health Insurance	45,248
1686113554	5231000	Life Insurance	631
1686113554	5232000	Dental Insurance	2,335
1686113554	5233000	Disability Insurance	1,594
1686113554	5234000	Sick Bank	372
1686113554	5240000	Workers' Compensation	3,416
		Sub-Total Personnel Services	\$ 367,914
1686113554	5310000	Professional Services	\$ 1,000
1686113554	5320000	Accounting and Auditing	\$ 4,000
1686113554	5340000	Other Contractual Services	9,260
1686113554	5400000	Travel And Per Diem	5,150
1686113554	5410000	Communication, Freight Svcs	9,500
1686113554	5440000	Rental and Leases	17,100
1686113554	5450000	Insurance	6,409
1686113554	5460000	Repairs And Maintenance	1,650

1686113554	5470000	Printing And Binding	1,000
1686113554	5490000	Other Current Chgs & Obligation	800
1686113554	5511000	Office Supplies	15,000
1686113554	5512000	Office Equipment	300
1686113554	5520000	Operating Supplies	2,160
1686113554	5521000	Op Supplies - Gas and Oil	1,000
1686113554	5540000	Books, Publications, Subscriptions & Memberships	625
1686113554	5541000	Registration Costs	8,725
Sub-Total Operating Expenditures			\$ 83,679

1686113554	5640000	Machinery And Equipment	-
Sub-Total Capital Outlay			\$ -

Total Administration Expenditures **\$ 451,593**

Section 8 Program

1686168554	5490000	Other Current Chgs & Obligation	\$ 1,111,500
1686168554	5491000	Other Chgs-Other Govt. Agencies	3,312,572
Sub-Total Operating Expenditures			\$ 4,424,072

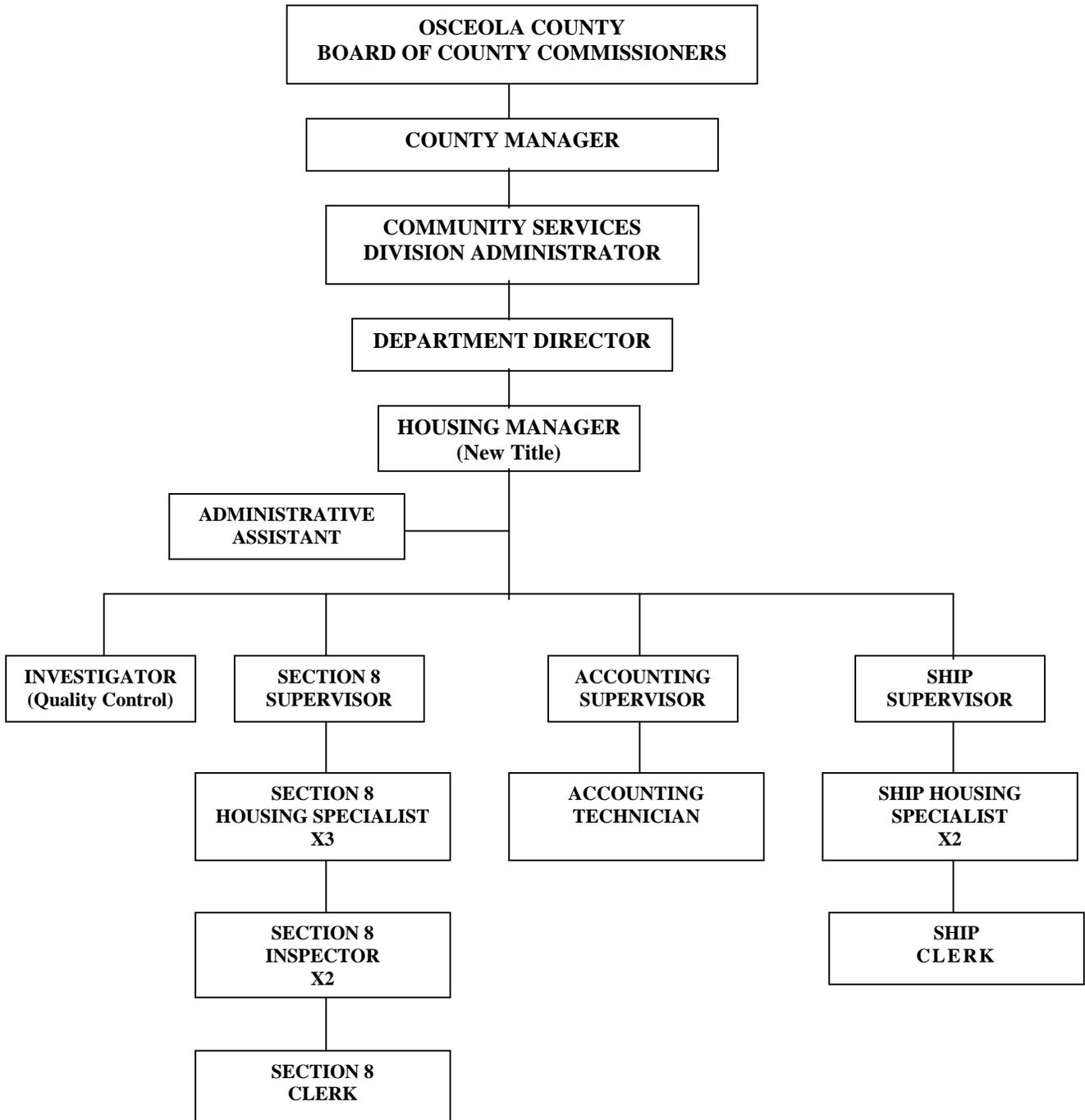
Total Program Expenditures **\$ 4,875,665**

1689981588	5990000	Transfers Out - General Fund	\$ 270,060
Sub-Total Transfers Out			\$ 270,060

1689981588	5990000	Reserve for Cash	-
Sub-Total Reserves/Contingencies			\$ -

Total Section 8 Expenditures **\$ 5,145,725**

Attachment C: Organizational Chart



Attachment D: Comments of Resident Advisory Board or Boards and the Public Hearing

A letter concerning the Five Year and Annual PHA Plan was mailed out on May 3, 2005 to the Resident Advisory Board (8 letters). Each letter invited residents to participate by completing a survey and/or attending a meeting.

A meeting was scheduled with residents on May 18, 2005.

An advertisement for the Public Hearing was placed in the Osceola Shopper, Orlando Sentinel and El Sentinel on May 11, 2005 and May 14, 2005.

The Public Hearing was held on June 20, 2005.

Questions were asked about how the agency was doing in response to SEMAP and other audits.

The response was that major strides had been made in improving operations and that the staff were confident that under its new leadership it would achieve proper SEMAP performance in the first year of the new Five Year Plan (2005-2006).

No other questions or comments were made on the Draft PHA Plan.

Attachment E: Homeownership Capacity Statement

The intent of the Plan is to develop specific local homeownership policies within program regulations designed to allow HCV program participants to become homeowners, while including adequate safeguards to protect program integrity, the Osceola County Housing Authority and program participants.

Prior to providing details of the Administrative Plan, Osceola County feels it is important to note that it has been operating an on going Homeownership Program since 1994. The Program is operated under the State of Florida regulations and is open to qualified households. The Administrative Plan has been developed in compliance with all known HUD regulations and with knowledge gained from past experience derived from the County's on going Homeownership Programs.

1. HUD REQUIREMENTS

Program participants will be selected from the current base of HCV participants. Initially the Program size will be limited to a few families in order to test run all the critical components of the program. The Authority will choose candidates for the Program based on the length of time of participation in the HCV Rental Assistance Program. Additionally, if the agency chooses to operate a Family Self-Sufficiency Program (FSS), a preference for current participants of such an FSS Program will be granted. All participants must meet the following minimum requirements as mandated by HUD.

- Must be a first time homeowner as defined by HUD. Specifically, applicants cannot have owned a home within the past three years.
- Both the family and the adult members who will own the home must be able to document a minimum annual income (excluding welfare) of \$10,300.
- One or more adult family members must be able to document that he or she has been continually employed (at least 30 hours per week) during the prior year. An interruption of 4 weeks or less is not considered a break in continuity. Considerations will be given for longer breaks in employment, **IF**, the adult family members were working an average of 20 hours per week and attending school or job training for 10 hours a week or more. Exemptions shall be granted to elderly and disabled participants.
- Must complete a HUD certified homeownership counseling program authorized or provided by the Osceola County Housing Authority.
- Must not have defaulted previously on HCV Homeownership Assistance.
- Program participant(s) must determine and document whether or not the unit is located in an airport runway clear zone or an airfield clear zone.
- Program participants must determine and document whether or not the unit is located in a flood hazard area. Units in flood hazard areas must retain flood insurance.

2. OSCEOLA COUNTY HOUSING AUTHORITY BRIEFING AND HOMEOWNERSHIP COUNSELING

While the Osceola County Housing Authority realizes that not all HCV tenants are ready, willing and able to purchase a home, once the program is officially adopted it plans to notify all current HCV program participants in writing, of the newly enacted Homeownership Option and provide a brief description of the program and its possible benefits.

If a participant responds to the initial letter, the participant will be mailed an application for entry into the Homeownership Option Program. Once the application has been completed and returned, the Osceola County Housing Authority will order and pay for a credit report in the name(s) of the applicant(s), perform an employment verification for all applicant(s) and determine the applicant's ability to qualify for financing and the amount of said financing. At this point, an individual briefing session will be scheduled.

At the Osceola County Housing Authority briefing session, the applicant(s) and at least one Osceola County Housing Authority staff person currently involved with the Authority's ongoing Homeownership Program will be in attendance. The Osceola County Housing Authority will provide the program participant(s) with information regarding geographic choice, portability and benefits of purchasing in low poverty areas. Additionally the participant's application, including their verified employment history and their current credit report, will be discussed and a determination of participant readiness to purchase will be made.

Having an active ongoing Homeownership Program, Osceola County Housing Authority staff has worked closely with local banks and are familiar with qualifying ratios and bank formulas used for evaluating home loan applications. Using income information supplied and verified by the applicant(s) employer and credit information taken from the applicant(s) credit report, Osceola County Housing Authority staff will determine if the applicant(s) income, credit history and current monthly installment debt are such that said applicant(s) is likely to qualify for a home loan and, if so, the approximate amount of the loan.

Assuming the applicant(s) is likely to qualify for a home loan in an amount sufficient to purchase a suitable home, the Osceola County Housing Authority will proceed to enroll the applicant in any HUD certified and approved homebuyer counseling program.

Homebuyer counseling will include the following elements:

1. Home maintenance
2. Budgeting and money management
3. Credit Counseling
4. Negotiate purchase price
5. Financing
6. Home search
7. Advantages of purchasing in areas that do not have high concentrations of low income families
8. Information regarding fair housing

9. Information relative to settlement procedures, truth in lending laws and loan terms

The Osceola County Housing Authority will strongly consider local circumstances and the needs of individual families when providing briefing and counseling. The Osceola County Housing Authority plans to require that program participants enroll in and complete post purchase counseling for a period of one year. The one-year local requirement may be extended at the discretion of the Osceola County Housing Authority.

3. SEARCH TIME / OPTIONS FOR HOUSEHOLDS UNABLE TO BUY

The Osceola County Housing Authority has chosen not to establish a minimum/maximum search time for program participants to select and purchase a home. Also, the Osceola County Housing Authority will not require program participants to provide periodic reports regarding the home search process.

4. UNIT ELIGIBILITY / INSPECTION REQUIREMENTS

In terms of unit eligibility, the Osceola County Housing Authority is required to enforce specific unit eligibility standards. One such standard is the type of unit a program participant may purchase. Under program guidelines, participants are restricted to purchasing existing or new single-family homes, condominiums and cooperatives units. The purchase of multi unit structures, including two family dwellings, is prohibited.

In terms of unit inspections, the Homeownership Option requires two pre-purchase inspections. One will be performed by a qualified Osceola County Housing Authority employee, while the second inspection is to be performed by a privately employed qualified professional Home Inspector. There will be no fee associated with the Osceola County Housing Authority inspection. However, the program participant must pay for the cost of the inspection done by a professional Home Inspector. The Osceola County Housing Authority will review the inspection performed by the professional Home Inspector and determine if the dwelling is suitable for purchase and eligible for sale to a program participant. The Osceola County Housing Authority may disapprove a unit based on information provided in the Inspection Reports.

The Osceola County Housing Authority plans to utilize the same procedure for unit inspection as it now uses for HCV rental units. Currently, the Osceola County Housing Authority has qualified staff persons designated to perform unit inspections prior to occupancy. The inspection conducted by the Authority will be used to determine compliance with Housing Quality Standards.

When a HCV unit is ready for inspection, the Osceola County Housing Authority inspector will gain access to the unit by coordinating with the property owner. The Osceola County Housing Authority inspector then conducts a thorough room-by-room inspection of the premises, including the basement and any and all mechanical systems, all common areas and the exterior. The inspection results are written on the Osceola County Housing Authority standard unit

inspection form and maintained on file. The unit must meet the inspection criteria of Housing Quality Standards in order to qualify for the Homeownership Program.

If the unit fails the inspection, the owner of the property will be required to make needed repairs in order to bring the unit into compliance with Housing Quality Standards.

As part of its existing homebuyer program, the Osceola County Housing Authority requires a home inspection by a qualified home inspector. In an effort to provide the potential HCV buyers with a choice of qualified home inspectors, the Osceola County Housing Authority has developed a list of qualified home inspectors in the Greater-Osceola County area. Each applicant will be given a copy of the list and the potential homebuyer(s) may select whomever they want. It should also be mentioned that prior to placing a home inspector's name on the list, the Osceola County Housing Authority requires said home inspector provide the Osceola County Housing Authority with their qualifications.

If the applicant wishes to utilize a home inspector who is not on the list the Osceola County Housing Authority will permit the applicant to do so. However, the Osceola County Housing Authority will require that the selected home inspector provide the Osceola County Housing Authority and the applicant with qualifications that are acceptable to the Osceola County Housing Authority.

5. CONTRACT OF SALE / BUYER PROTECTION

In terms of the contract for sale, the Osceola County Housing Authority plans to utilize the same contract for sale as it now uses for its ongoing homebuyer program.

The contract for sale will contain an additional list of provisions including the following:

- The price and other terms of sale.
- The purchaser will arrange for a pre-purchase inspection to be performed by an independent inspector selected and paid for by the purchaser.
- The purchaser is not obligated to purchase the unit unless the inspection is satisfactory to the purchaser and the Osceola County Housing Authority.
- The purchaser is not obligated to pay for any repairs.
- The seller certifies that he or she has not been debarred, suspended, or subject to a limited denial of participation under part 24 of this title.

6. FINANCING

The Osceola County Housing Authority plans to develop financing programs appropriate to the program.

The financing package is as follows:

1. The payment standard for the family unit size
2. The payment standard for the size of the home

The Osceola County Housing Authority will use the same payment schedule, payment standard amounts and subsidy standards for the Homeownership Option as for the Rental Voucher Program. The Osceola County Housing Authority will conduct an annual reexamination of program participants in order to update income, family size and other relevant data and adjust the payment standard accordingly.

The Osceola County Housing Authority will adopt for each participant an estimate of homeownership expenses in accordance with HUD requirements:

1. Principal and interest on initial mortgage(s) debt including refinancing if any
2. Real estate taxes
3. Sewer and water fees
4. Trash pick up and disposal fees
5. Homeowners insurance costs
6. Allowance for maintenance expenses
7. Allowance for costs of major repairs and replacements
8. Utility allowance
9. Principal and interest on debt incurred to finance major repairs or handicap accessible

If the home is a cooperative or condominium unit, homeownership expenses will include maintenance fees assessed by the condominium or cooperative homeowner association fees. Additionally, if a Housing Trust is established to provide second mortgages for homebuyers, the Osceola County Housing Authority will make its HAP payment directly to the second mortgage lender. If the HAP exceeds the amount due the second mortgage lender, the Osceola County Housing Authority will pay the difference directly to the homeowner. If the HAP is less than the second mortgage payment, the homeowner will pay the difference to the second mortgage lender from its own funds. If the Housing Trust is not established or designated by the Housing Authority, the preferred payment approach will be to make the HAP directly to the first mortgage lender on behalf of the homeowner.

The term of homeowner assistance (HAP) shall be fifteen (15) years if the term of the first mortgage is twenty (20) years or longer, except in the case of elderly and disabled program participants where the maximum term of fifteen (15) years does not apply. In all other cases, the term shall be ten (10) years.

8. POST PURCHASE REQUIREMENTS FOR FAMILIES

The family must sign a statement of homeowner obligations before the start of homeownership assistance agreeing to comply with all obligations under the program.

In keeping with HUD regulations, the Osceola County Housing Authority has imposed the following post purchase requirements:

- The family must reside in the home. If the family moves out of the home, the Osceola County Housing Authority will not continue homeownership assistance payments after the month when the family moves out.
- The Osceola County Housing Authority will require each family receiving homeownership assistance to attend and participate in post purchase counseling. The counseling sessions will be administered by either Osceola County Housing Authority staff or a certified post purchase counseling agent and will focus on home maintenance issues, family finances and budgeting and maintaining good credit by ensuring that the family is paying off its credit card and other monthly debt in a timely fashion.
- The family must comply with the terms of all mortgage(s) securing debt incurred to purchase the home and any refinancing debt, if applicable.
- The family must not convey or transfer ownership of the home while receiving homeownership assistance.
- The family may grant a mortgage on the home for debt incurred to finance the purchase of the home or any refinancing of such debt.
- After the death of a family member who holds title to the home, homeownership assistance will continue pending settlement of the estate provided that the family continues to occupy the home.
- The family must comply with all requirements of the Homeownership Program or be subject to termination of assistance.
- The family must allow the Osceola County Housing Authority access to the home for the purpose of performing an inspection, if it is so required.

The family must supply the Osceola County Housing Authority with the following information upon request:

- Information relative to any mortgage(s) secured by the property.
- Any sale or transfer of any interest in the home.
- The family must provide the Osceola County Housing Authority with its homeownership expenses.
- The family must notify the Osceola County Housing Authority before moving out of the home.
- The family must notify the Osceola County Housing Authority if it defaults on any mortgage securing debt incurred to purchase the home. If the family defaults on the mortgage, the Osceola County Housing Authority may choose to issue a Voucher to the family to facilitate a move to a rental unit and continue rental assistance. However, the determination will be at the Osceola County Housing Authority's discretion, based on the good faith efforts of the family to meet its obligations and prevent default.
- Proof that no family member has an ownership interest in other real estate while receiving homeownership assistance.

9. PORTABILITY

The Osceola County Housing Authority will accept portable voucher holders into the program, as required by HUD. If a family currently participating in the Osceola County Housing Authority's HCV Rental Voucher Program wants to purchase a home outside of the Osceola County Housing Authority's jurisdiction under the Homeownership Option it may do so provided that the receiving PHA is accepting new homeownership families and provided that the family meets all the requirements of the receiving PHA.

10. RECAPTURE OF HOMEOWNERSHIP ASSISTANCE

Program recipients participating in the Homeownership Option are subject to recapture provisions if the homebuyer uses funds which have recapture or resale restrictions.

At the time of purchase, the Osceola County Housing Authority will place a lien on the property in accordance with the regulations from the financing source requiring restrictions. The lien will be drawn up in such a way that it is consistent with State and local law. However, as HUD does not permit recapture restrictions on HAP subsidies, any recapture provisions apply only to other sources of assistance. At this time, the application of recapture of homeownership assistance provided by Osceola County (other than HAP payments), subject to recapture will automatically be reduced over a five-year period, beginning from the purchase date, in annual increments of twenty percent. At the end of the five-year period, the amount of homeownership assistance subject to recapture will be zero.

In the case of a refinancing of the home, this recapture procedure will also apply.

11. ELIGIBLE UNITS

The units which can be purchased under this program can be a single family house (attached or detached), a condominium unit or a cooperative share. A manufactured home is also eligible under certain conditions.

12. OTHER PROVISIONS

A family receiving homeownership assistance can move to a new unit with homeownership assistance, as long as it is in compliance with program requirements, no family member has any ownership interest in the prior unit, and the Osceola County Housing Authority has sufficient funds. To move with continued homeowner assistance, families must again meet all eligibility requirements. A family may not move more than one time per year.

Attachment F1: Certifications

The required certifications are attached separately and are mailed to the Miami Field Office of HUD.