

PHA Plans

Streamlined 5-Year/Annual Version

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

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

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

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

Streamlined 5-Year Plan for Fiscal Years 2005 - 2009

Streamlined Annual Plan for Fiscal Year 2005

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

Streamlined Five-Year PHA Plan Agency Identification

PHA Name: Low Rent Housing Agency of Burlington, Iowa **PHA Number:** IA015

PHA Fiscal Year Beginning: (01/2005)

PHA Programs Administered:

Public Housing and Section 8 **Section 8 Only** **Public Housing Only**

Number of public housing units: 193 DU / 201 ACC

Number of Section 8 units: 277

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

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

Public Access to Information

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

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

Display Locations For PHA Plans and Supporting Documents

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

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

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

- Main business office of the PHA

- PHA development management offices
- Other (list below)

Streamlined Five-Year PHA Plan

PHA FISCAL YEARS 2005 - 2009

[24 CFR Part 903.12]

A. Mission

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

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- X The PHA's mission is: to address the housing needs of Burlington, Iowa's lower-income population in a non-discriminatory manner through advocacy, administration of programs, promotion of economic opportunity, and ownership of public housing.

B. Goals

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD-suggested objectives or their own, **PHAs ARE STRONGLY ENCOURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS.** (Quantifiable measures would include targets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the spaces to the right of or below the stated objectives.

HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.

1. PHA Goal: Expand the supply of assisted housing
Objectives:
 - A. Apply for additional rental vouchers (25 units):
 - B. Reduce public housing vacancies:
 - 1) Market units before reconditioning is completed to decrease turnaround time.
 - 2) Utilize contract services to recondition units during periods of high turnover to reduce turnaround time.
 - Leverage private or other public funds to create additional housing opportunities:
 - Acquire or build units or developments
 - Other (list below)
2. PHA Goal: Improve the quality of assisted housing
Objectives:
 - A. Improve public housing management: 100% PHAS score.
 - B. Improve voucher management: 100% SEMAP score.
 - C. Increase customer satisfaction:
 - 1) Improve RASS score.
 - 2) Paint all hallways and interior doorframes.

- 3) Conduct at least two Agency-sponsored resident activities or programs at Autumn Heights Apartments each month.
3. Concentrate on efforts to improve specific management functions:
- A. Reduce the cost of the Housing Choice Voucher Program (HCVP).
 - 1) Reduce administration expenses to achieve a balanced budget (6.2% target).
 - 2) Reduce the cost of the average HAP to achieve a balanced budget.
 - B. Successfully implement UIV.
 - C. Refine quality control oversight to achieve continuous improvement of each administrative process.
 - D. Conduct at least one safe work practices training course for lead-based paint per year.
 - E. Refine administration of CFP to complete and close out each grant within twenty-four months.
 - F. Include at least one staff member's attendance at one regional or national conference sponsored by NAHRO or PHADA each year.
 - G. Each full-time employee to attend at least three (3) training courses during the planning period.
4. Renovate or modernize public housing units:
- Accomplish improvements supportive of asset management objectives.
 - A. Reduce energy consumption.
 - B. Continue accomplishment of the 5-year action plan(s).
 - Demolish or dispose of obsolete public housing:
 - Provide replacement public housing:
 - Provide replacement vouchers:
 - Other: (list below)
5. PHA Goal: Increase assisted housing choices
- Objectives:
- Provide voucher mobility counseling:
 - A. Conduct outreach efforts to potential voucher landlords: Conduct one program each year.
 - Increase voucher payment standards
 - Implement voucher homeownership program:
 - B. Continue implementation of Voucher Homeownership programs: 5 projects within two years.
 - Implement public housing site-based waiting lists:
 - Convert public housing to vouchers:
 - Other: (list below)

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

1. PHA Goal: Provide an improved living environment
- Objectives:
- Implement measures to deconcentrate poverty by bringing higher income public

- housing households into lower income developments:
- Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
- A. Implement public housing security improvements:
 - 1) Continue to employ a public housing employee to perform protective service inspections.
 - 2) Install security cameras on first floor of high-rise and other high-risk areas.
- Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
- Other: (list below)

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

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

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

- 1. PHA Goal: Ensure equal opportunity and affirmatively further fair housing
Objectives:
 - Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:
 - A. Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:
 - 1) Provide information to voucher holders regarding unlawful discrimination and any recourse that may be available to them.
 - 2) Post fair housing posters in PHA offices.
 - 3) Attend fair housing training.
 - 4) Analyze and address disproportionate housing needs.
 - B. Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
 - 1) Make reasonable accommodations.
 - 2) Attend fair housing training.
 - 3) Notify agencies/organizations serving persons with disabilities about the availability of assisted housing.
 - Other: (list below)

Other PHA Goals and Objectives: (list below)

1. Continue to work to improve participation in the Autumn Heights Resident Council each year of the planning cycle. The baseline is carried over from the previous PHAP and is 35 residents.

Streamlined Annual PHA Plan

PHA Fiscal Year 2005

[24 CFR Part 903.12(b)]

Table of Contents

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

A. ANNUAL STREAMLINED PHA PLAN COMPONENTS

- X 1. Housing Needs
- X 2. Financial Resources
- X 3. Policies on Eligibility, Selection and Admissions
- X 4. Rent Determination Policies
- X 5. Capital Improvements Needs
- X 6. Demolition and Disposition
- X 7. Homeownership
- X 8. Civil Rights Certifications (included with PHA Certifications of Compliance)
- X 9. Additional Information
 - a. PHA Progress on Meeting 5-Year Mission and Goals (ia015a06.doc)
 - b. Criteria for Substantial Deviations and Significant Amendments (ia015b06.doc)
 - c. Other Information Requested by HUD
 - i. Resident Advisory Board Membership and Consultation Process
 - ii. Resident Membership on the PHA Governing Board
 - iii. PHA Statement of Consistency with Consolidated Plan
 - iv. (Reserved)
- X 10. Project-Based Voucher Program
- X 11. Supporting Documents Available for Review
- X 12. FY 2004 Capital Fund Program and Capital Fund Program Replacement Housing Factor, Annual Statement/Performance and Evaluation Reports (Attachment ia015c06.doc)
- X 13. Capital Fund Program 5-Year Action Plan (Attachment ia015d06.doc)
- 14. Other (List below, providing name for each item)

B. SEPARATE HARD COPY SUBMISSIONS TO LOCAL HUD FIELD OFFICE

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

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

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

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

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

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

Executive Summary (optional)

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

This is the Low Rent Housing Agency of Burlington, Iowa's sixth year under PHAP requirement. It is also the first year of a new five-year plan cycle and it has been developed using the streamlined template for the first time. The current plan continues to reflect much of the content found in previous iterations as the goals and objectives, and means of achievement have remained stable, valid and appropriate. The criticality of two major items from the FY 2004 plan has decreased. Changing the designation of Autumn Heights (currently mixed) and establishing a use for the adjoining site have declined in importance because of changes in the composition of the waiting list and because portions of the adjoining site have been used for parking. The single most important issue now facing the Agency is the adequacy of funding for the Housing Choice Voucher Program. It is possible that changes will have to be made in staffing; expense allocations and/or the Section 8 Administration Plan to effectuate savings. HAPs have risen sharply over the last eighteen months and reductions in subsidy levels, increases in participant burdens, and/or lowered targeting requirements may have to be considered to achieve a balanced budget.

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

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

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

Housing Needs of Families on the PHA's Waiting Lists			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/sub-jurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	99		
Extremely low income <=30% AMI	73	73	
Very low income (>30% but <=50% AMI)	25	25	
Low income (>50% but <80% AMI)	1	1	
Families with children	65	66	
Elderly families	24	24	
Families with Disabilities	25	25	
Race/ethnicity (Black)	21	21	

Housing Needs of Families on the PHA's Waiting Lists			
Race/ethnicity			
Race/ethnicity			
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)? 12/19/2003			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?			
X No <input type="checkbox"/> Yes			

Housing Needs of Families on the PHA's Waiting Lists			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/sub-jurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	64		
Extremely low income <=30% AMI	40	63	
Very low income (>30% but <=50% AMI)	15	23	
Low income (>50% but <80% AMI)	9	14	
Families with children			
Elderly families	31	48	
Families with Disabilities	33	52	
Race/ethnicity	62	97	
Race/ethnicity (Hispanic)	2	3	
Race/ethnicity			
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	55	86	
2 BR	9	14	
3 BR			
4 BR			
5 BR			

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

B. Strategy for Addressing Needs

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

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

Select all that apply

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

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

Select all that apply

- A. Apply for additional section 8 units should they become available (25 units)
- Leverage affordable housing resources in the community through the creation of mixed –

- finance housing
- Pursue housing resources other than public housing or Section 8 tenant-based assistance.
- Other: (list below)

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

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

Select all that apply

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

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

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

Select all that apply

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

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

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

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

- Seek designation of public housing for families with disabilities
- Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing
- Apply for special-purpose vouchers targeted to families with disabilities, should they become available

- Affirmatively market to local non-profit agencies that assist families with disabilities
- Other: (list below)

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

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

Select if applicable

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

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

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

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

(2) Reasons for Selecting Strategies

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

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

2. Statement of Financial Resources

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

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

those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2005 grants)		
a) Public Housing Operating Fund	70,000.00	
b) Public Housing Capital Fund	256,407.00	
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	960,000.00 (HAPS) 131,000.00 (Administration)	
f) Resident Opportunity and Self-Sufficiency Grants		
g) Community Development Block Grant		
h) HOME		
Other Federal Grants (list below)		
2. Prior Year Federal Grants (unobligated funds only) (list below)		
IA05P01550103	66,518.44	As budgeted.
IA05P01550203	10,648.35	As budgeted.
3. Public Housing Dwelling Rental Income		
	510,000.00	Operations.
4. Other income (list below)		
4. Non-federal sources (list below)		
Interest	10,000.00	Operations.
Cable TV	12,540.00	Operations.
Activities	5,000.00	Operations.
Sales Tax Refund	8,000.00	Operations.
Total resources	2,040,113.70	

3. PHA Policies Governing Eligibility, Selection, and Admissions

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

A. Public Housing

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

(1) Eligibility

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

When families are within a certain number of units from being offered a unit: (state number)

When families are within a certain time of being offered a unit: ten days

Other: (describe)

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

Criminal or Drug-related activity

Rental history

Housekeeping

Other (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)

1) PHA the capability to perform FBI criminal records searches, but has not implemented this level of screening due to cost and technical considerations.

(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. Site-Based Waiting Lists-Previous Year

1. Has the PHA operated one or more site-based waiting lists in the previous year? If yes, complete the following table; if not skip to d.

Site-Based Waiting Lists

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

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

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

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

d. Site-Based Waiting Lists – Coming Year

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

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

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

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

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

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

(3) Assignment

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

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

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
- X Other preference(s) (list below)
 - a. Singles preference.
 - b. Income targeting.

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

3 Date and Time

Former Federal preferences:

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- Victims of domestic violence
- Substandard housing
- 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)
- 2 Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- 1 Other preference(s) (list below)
 - a. Singles preference

4. Relationship of preferences to income targeting requirements:

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

(5) Occupancy

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

- X The PHA-resident lease
- X The PHA’s Admissions and (Continued) Occupancy policy
- X PHA briefing seminars or written materials
- X Other source (list)
 - a. Informational Booklet (House Rules).
 - b. Autumn Leaves Newsletter
 - c. Special notices.
 - d. Housing and Development Reporter Current Developments.

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

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

(6) Deconcentration and Income Mixing

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

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

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

B. Section 8

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

(1) Eligibility

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

(2) Waiting List Organization

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

(3) Search Time

- a. Yes No: Does the PHA give extensions on standard 60-day period to search for a unit? If yes, state circumstances below:
- 1) Extenuating circumstances such as hospitalization.
 - 2) When reasonable effort was exerted throughout the shopping period.
 - 3) When vacancy rates are below 5%.
 - 4) As an accommodation for a disability-related problem(s).

(4) Admissions Preferences

a. Income targeting

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

b. Preferences

1. Yes No: Has the PHA established preferences for admission to section 8 tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent **(5) Special purpose section 8 assistance programs**)

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

Former Federal preferences

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

Other preferences (select all that apply)

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

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

Date and Time

Former Federal preferences:

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

- Victims of domestic violence
- Substandard housing
- Homelessness
- High rent burden

Other preferences (select all that apply)

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

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

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

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

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

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

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

(5) Special Purpose Section 8 Assistance Programs

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

- X 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?

- X Through published notices
- Other (list below)

4. PHA Rent Determination Policies [24 CFR Part 903.12(b), 903.7(d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

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

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

b. Minimum Rent

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

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

2. Yes X 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% of adjusted income

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

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

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

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

If yes, state amount/s and circumstances below:

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

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

e. Ceiling rents

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

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

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

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

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

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

f. Rent re-determinations:

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

- Never
- At family option
- 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

a. 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
- X Reflects market or submarket
- X To increase housing options for families
- Other (list below)

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

- X 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)

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

(2) Minimum Rent

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

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

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

5. Capital Improvement Needs

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

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

A. Capital Fund Activities

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

(1) Capital Fund Program

- a. X Yes No Does the PHA plan to participate in the Capital Fund Program in the upcoming year? If yes, complete items 12 and 13 of this template (Capital Fund Program tables). If no, skip to B.
- b. Yes X No: Does the PHA propose to use any portion of its CFP funds to repay debt incurred to finance capital improvements? If so, the PHA must identify in its annual and 5-year capital plans the development(s) where such improvements will be made and show both how the proceeds of the financing will be used and the amount of the annual payments required to

service the debt. (Note that separate HUD approval is required for such financing activities.).

Optional Table for 5-Year Action Plan for Capital Fund

Optional 5-Year Action Plan Tables				
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development	
IA015001	Autumn Heights	5	2	
Description of Needed Physical Improvements or Management Improvements			Estimated Cost	Planned Start Date (HA Fiscal Year)
1. Replace shingles on five low-rise buildings			125,000	2005
2. Replace refrigerators			100,000	2005
3. Install security cameras in high-rise			7,407	2005
4. Remodel high-rise Community Room kitchen			10,000	2005
5. Landscape borders			5,000	2005
6. Cooking ranges			9,000	2005
7. Complete high-rise Community Room kitchen remodel			10,000	2006
8. Remodel kitchens and bathrooms			150,000	2006
9. Reconditioned backhoe			40,000	2006
10. Equipment storage building			50,000	2006
11. Continue to remodel kitchens and bathrooms			65,000	2007
12. Upgrade computers			20,000	2007
13. Repair gazebo			5,000	2007
14. Repair/replace pond			10,000	2007
15. Replace drapes			50,000	2007
16. Construct storage building			100,000	2007
17. Complete replacement of drapes			50,000	2008
18. Replace sidewalks			50,000	2008
19. Remodel high-rise Community Room			10,000	2008
20. Powder coat heat registers and fan grills			10,000	2008
21. Replace bridge over pond			5,000	2008
22. Replace/expand landscaping			20,000	2008
23. Upgrade exterior lighting			20,000	2008
24. Replace dining tables and chairs			5,000	2008
25. Benches			12,500	2008
26. Replace folding chairs			2,500	2008
27. Replace beauty shop equipment			5,000	2008
28. Complete set of hand tools			5,000	2008
29. Continue to remodel kitchens and bathrooms			55,000	2008
30. Caulk H-R exterior			50,000	2009
31. Mowing equipment			20,000	2009
32. Water hydrant for fire protection			15,000	2009
33. Procure maintenance power equipment, including, but not limited to the following: concrete saw, table saw, miter saw, small chain saw, mig welder, and air compressor.			10,000	2009
34. Replace floor tile throughout			50,000	2009
35. Replace telephone lines			10,000	2009
36. Paint apartment interiors			50,000	2009
37. Remodel offices			20,000	2009
38. Remodel / redecorate L-R community and laundry rooms			25,000	2009
Subtotal			1,256,407	

Activities that have not been assigned by year, but are fungible:		
1. Procure floor maintenance equipment		
2. Construct shelter house		
3. Add electrical outlet within apartments		
4. Complete security improvements	6,000	
5. Complete lighting in apartments	40,000	
6. Soundproof L-R corridors	20,000	
7. Emergency generator	32,500	
8. Continue remodel kitchens and bathrooms	5,000	
9. Install canopies over main entry and east entry	26,000	
10. Maintenance trailer	200,000	
11. Landscape equipment including power rake and box scraper	930,000	
12. Replace door locks	110,000	
13. Replace office equipment	750	
14. Refuse collection equipment	5,000	
15. Remodel elevator cars	30,000	
16. Air condition Director's office	10,000	
17. Carpentry / cabinet-making power equipment	2,000	
	10,000	
	4,000	
	10,000	
Subtotal	1,441,250	
Total estimated cost over next 5 years	2,697,657	

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

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

(1) Hope VI Revitalization

a. Yes X No: Has the PHA received a HOPE VI revitalization grant? (if no, skip to next component; if yes, provide responses to questions on chart below for each grant, copying and completing as many times as necessary)

b. Status of HOPE VI revitalization grant (complete one set of questions for each grant)

Development name:

Development (project) number:

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

- Revitalization Plan under development
 Revitalization Plan submitted, pending approval
 Revitalization Plan approved

Activities pursuant to an approved Revitalization Plan underway

c. Yes No: Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year? If yes, list development name/s below:

d. Yes No: Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year? If yes, list developments or activities below:

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

6. Demolition and Disposition

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

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

a. Yes No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 or 24 (Hope VI) of the U.S. Housing Act of 1937 (42 U.S.C. 1437p) or Section 202/Section 33 (Mandatory Conversion) in the plan Fiscal Year? (If “No”, skip to component 7; if “yes”, complete one activity description for each development on the following chart.)

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

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

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

- (1) Yes No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982 ? (If “No”, skip to the next component; if “yes”, complete each program description below (copy and complete questions for each program identified.)

(2) Program Description

a. Size of Program

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

If the answer to the question above was yes, what is the maximum number of participants this fiscal year? 5

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:

- 1) Competitive selection process for initial five candidates.
- 2) Willingness to accept restrictions associated with use of Community Rehabilitation and Ownership Program.

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

- 1) Conduct group training using Money Smart.
- 2) Conduct individual training using Homeownership On-line.
- 3) Conduct Group training regarding home maintenance, property selection, etc.
- 4) Meet with financial institutions on behalf of program and individuals.
- 5) Coordinate with CROP Program partners.

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

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

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

8. Civil Rights Certifications

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

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

9. Additional Information

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

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

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

Refer to attachment file ia015a06.doc

B. Criteria for Substantial Deviations and Significant Amendments

(1) Amendment and Deviation Definitions

24 CFR Part 903.7(r)

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

a. Substantial Deviation from the 5-Year Plan: refer to attachment file ia015b06.doc

b. Significant Amendment or Modification to the Annual Plan: refer to attachment file ia015b06.doc

C. Other Information

[24 CFR Part 903.13, 903.15]

(1) Resident Advisory Board Recommendations

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

If yes, provide the comments below:

VOUCHER PROGRAM

1. Only reduce Payment Standards as a last resort cost control measure (consider attrition first).
2. Keep Utility Allowances as low as possible.

3. Continue to work through trade associations and Congressional contacts to keep structure of Voucher Program viable for this PHA.
4. Consider adding Vouchers (25).
5. Only reduce staffing as a last resort cost control measure.
6. Under "Flexible Voucher" scenario:
 - A. Strive to retain the current number of units (base-line).
 - B. Retain sufficient program oversight to preserve the integrity of the program.
 - C. Retain 50% of median income as eligibility threshold.

PUBLIC HOUSING

1. Prioritize replacement of roofs on low-rise buildings and refrigerators within the FY 2004 CFP.
2. Convene a study group to investigate the feasibility of an assisted living project for lower-income individuals and families.
3. Discontinue consideration of a designated housing plan that would restrict Autumn Heights to exclusive occupancy by the elderly.
4. Realign the "flat rents" to prevailing market conditions.
5. Prioritize the procurement of a reconditioned backhoe and an equipment storage building within the FY 2005 CFP.
6. Prioritize the procurement of a surveillance camera system for the first floor of the high-rise building within the FY 2005 CFP.

PREVIOUS

1. Retain recommendations 2, 3 and 4 from 2004 PHAP as follows:
 - A. Provide Section 8 assistance to one or more owners of newly constructed or substantially rehabilitated housing for persons with disabilities. The maximum number of Vouchers utilized shall not exceed 28, the equivalent of ten percent (10%) of the baseline.
 - B. Continue the Section 8 Homeownership Program contingent upon the achievement of favorable results under the initial round of activities that commenced in 2003. This second initiative shall be limited to a maximum of ten (10) Homeownership Vouchers.
 - C. Prioritize the installation of emergency electricity generating equipment including investigating the availability of equipment from a State or Federal Government source, a special grant program or from a privately owned salvage or demolition project.
2. Complete the handrail (east side high-rise) by no later than May 31, 2005.

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

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

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

X Other: (list below)

The Board of Commissioners has initially accepted the recommendations of the RAB, but retains the right to deviate when it determines that changes are necessary.

(2) Resident Membership on PHA Governing Board

The governing board of each PHA is required to have at least one member who is directly assisted by the PHA, unless the PHA meets certain exemption criteria. Regulations governing the resident board member are found at 24 CFR Part 964, Subpart E.

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

X Yes No:

If yes, complete the following:

Name of Resident Member of the PHA Governing Board: Richard Tiemeyer

Method of Selection:

X Appointment

The term of appointment is (include the date term expires): 02/21/2006

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

Description of Resident Election Process

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

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

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)

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)

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

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

Date of next term expiration of a governing board member:

Name and title of appointing official(s) for governing board (indicate appointing official for the next available position):

(3) PHA Statement of Consistency with the Consolidated Plan

[24 CFR Part 903.15]

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

Consolidated Plan jurisdiction: (provide name here)

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

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

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

(4) (Reserved)

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

10. Project-Based Voucher Program

a. X Yes No: Does the PHA plan to “project-base” any tenant-based Section 8 vouchers in the coming year? If yes, answer the following questions.

b. X Yes No: Are there circumstances indicating that the project basing of the units, rather than tenant-basing of the same amount of assistance is an appropriate option?

If yes, check which circumstances apply:

- Low utilization rate for vouchers due to lack of suitable rental units
- Access to neighborhoods outside of high poverty areas
- X Other (describe below):
 - 1) Reduce level of taxation required to operate County RCF.

- 2) Expand amount of high quality housing that is availability for the disabled population.
- c. Indicate the number of units and general location of units (e.g. eligible census tracts or smaller areas within eligible census tracts):
- 1) Not to exceed 28 units.
 - 2) No specific area has been identified.

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

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
X	<i>PHA Certifications of Compliance with the PHA Plans and Related Regulations and Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans.</i>	Standard 5 Year and Annual Plans; streamlined 5 Year Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan.	5 Year Plans
X	Fair Housing Documentation Supporting Fair Housing Certifications: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans
X	Housing Needs Statement of the Consolidated Plan for the jurisdiction(s) in which the PHA is located and any additional backup data to support statement of housing needs for families on the PHA’s public housing and Section 8 tenant-based waiting lists.	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O/ACOP), which includes the Tenant Selection and Assignment Plan [TSAP] and the Site-Based Waiting List Procedure.	Annual Plan: Eligibility, Selection, and Admissions Policies
	Any policy governing occupancy of Police Officers and Over-Income Tenants in Public Housing. <input type="checkbox"/> Check here if included in the public housing A&O Policy.	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the method for setting public housing flat rents. X Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development. X Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies (if included in plan, not necessary as a supporting document) and written analysis of Section 8 payment standard policies. X Check here if included in Section 8 Administrative Plan.	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation).	Annual Plan: Operations and Maintenance

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
X	Results of latest Public Housing Assessment System (PHAS) Assessment (or other applicable assessment).	Annual Plan: Management and Operations
X	Follow-up Plan to Results of the PHAS Resident Satisfaction Survey (if necessary)	Annual Plan: Operations and Maintenance and Community Service & Self-Sufficiency
X	Results of latest Section 8 Management Assessment System (SEMAP)	Annual Plan: Management and Operations
X	Any policies governing any Section 8 special housing types X check here if included in Section 8 Administrative Plan	Annual Plan: Operations and Maintenance
	Consortium agreement(s).	Annual Plan: Agency Identification and Operations/ Management
X	Public housing grievance procedures X Check here if included in the public housing A & O Policy.	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures. X Check here if included in Section 8 Administrative Plan.	Annual Plan: Grievance Procedures
X	The Capital Fund/Comprehensive Grant Program Annual Statement /Performance and Evaluation Report for any active grant year.	Annual Plan: Capital Needs
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grants.	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans, or any other approved proposal for development of public housing.	Annual Plan: Capital Needs
X	Self-evaluation, Needs Assessment and Transition Plan required by regulations implementing Section 504 of the Rehabilitation Act and the Americans with Disabilities Act. See PIH Notice 99-52 (HA).	Annual Plan: Capital Needs
	Approved or submitted applications for demolition and/or disposition of public housing.	Annual Plan: Demolition and Disposition
	Approved or submitted applications for designation of public housing (Designated Housing Plans).	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act, Section 22 of the US Housing Act of 1937, or Section 33 of the US Housing Act of 1937.	Annual Plan: Conversion of Public Housing
	Documentation for required Initial Assessment and any additional information required by HUD for Voluntary Conversion.	Annual Plan: Voluntary Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans.	Annual Plan: Homeownership
X	Policies governing any Section 8 Homeownership program (Chapter 19 of the Section 8 Administrative Plan)	Annual Plan: Homeownership
X	Public Housing Community Service Policy/Programs X Check here if included in Public Housing A & O Policy	Annual Plan: Community Service & Self-Sufficiency
X	Cooperative agreement between the PHA and the TANF agency and between the PHA and local employment and training service agencies.	Annual Plan: Community Service & Self-Sufficiency
	FSS Action Plan(s) for public housing and/or Section 8.	Annual Plan: Community Service & Self-Sufficiency
X	Section 3 documentation required by 24 CFR Part 135, Subpart E for public housing.	Annual Plan: Community Service & Self-Sufficiency
	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports for public housing.	Annual Plan: Community Service & Self-Sufficiency
X	Policy on Ownership of Pets in Public Housing Family Developments (as required by regulation at 24 CFR Part 960, Subpart G). <input type="checkbox"/> Check here if included in the public housing A & O Policy.	Pet Policy

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
X	The results of the most recent fiscal year audit of the PHA conducted under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings.	Annual Plan: Annual Audit
	Consortium agreement(s), if a consortium administers PHA programs.	Joint PHA Plan for Consortia
	Consortia Joint PHA Plans ONLY: Certification that consortium agreement is in compliance with 24 CFR Part 943 pursuant to an opinion of counsel on file and available for inspection	Joint PHA Plan for Consortia
	Other supporting documents (optional). List individually.	(Specify as needed)

STATEMENT OF PROGRESS IN MEETING THE 5-YEAR PLAN MISSION AND GOALS – 2005 ANNUAL PLAN UPDATE
Covers period 1999 through 08/15/2004

GOALS	BENCHMARKS	PERFORMANCE STATEMENTS	MEETING	DATE	SOURCES
1. Increase the availability of decent, safe and affordable housing					
A.1) Market turnover units before reconditioning is completed.	Policy Revision	Complying	Yes	12/31/03	MASS
A.2) Utilize contract services to recondition units during periods of high turnover.	Policy Revision	Complying	Yes	12/31/03	MASS
B.Other 1) Make a decision on the possible designation of Autumn Heights for exclusive occupancy by the elderly. An affirmative decision will necessitate substitution of alternative assistance for the population that loses admissions eligibility	Board Resolution(s)	Decision deferred	No	---	Minutes
2. Improve the quality of assisted housing.					
A.1) Renovate or modernize public housing units.	5-Year Action Plan	Complying	Yes	08/09/04	HUD-52825
A.2) Conduct at least one Agency-sponsored activity / program at Autumn Heights each month.	One per month	Complying	Yes	08/15/04	Calendar
B.1) Implement a computerized maintenance tracking system Autumn Heights.	Create system	Accomplished	Yes	01/01/03	Lindsey
B.2) Successfully transition to GAAP with no audit findings once changes are properly implemented.	No audit findings	Complying	Yes	12/31/03	2001 Audit
B.3) Place 95% or more units of Section 8 into utilization each year.	+95% utilization	Complying	Yes	12/31/03 08/31/04	HUD-52681 HUD-52681-B
B.4) Decrease average number of calendar days public housing units are in lease-up time by 10% each year of the planning period.	14.83 days (1999)	57.00 days (2003)	No	12/31/03	MASS
B.5) Implement each Administrative Plan update within three months of receiving template from Nan McKay.	Implement in 3 months	Complying	Yes	08/15/04	S/8 Plan
B.6) Implement any required modification to public housing ACOP within 6 months of regulation/law changes.	Implement in 6 months	Complying	Yes	08/15/04	ACOP
B.7) Implement improved Section 8 rent comparability process.	Create system	Active	Yes	01/01/02	S/8 Plan
C.1) Complete space conversion to establish 5 enlarged one-bedroom units.	Merge 5 Units	Accomplished	Yes	10/02/00	MASS

C.2) Continue to use CIAP/CFP in an effective manner to accomplish 5-year CFP action plan.	5-year Action Plan	Complying	Yes	08/15/04	HUD-52825
D.1) Participate in public housing Operating Fund Program.	Board Resolution	Complying	Yes	12/28/00	HUD-52721
D.2) Participate in public housing Capital Fund Program and expend these funds within two years of approval date.	Board Resolution	Complying	Yes	08/15/04	HUD-52825
D.3) Maintain PHAS high-performer status throughout the planning period	2003 PHAS	Complying	Yes	12/31/03	REAC
D.4) Attain SEMAP high performer status during the planning period.	2003 SEMAP	Complying	Yes	12/31/03	PIC
D.5) Accomplish all "Betterments and Additions" included in the Agency's public housing budget.	2003 Budget	Complying	Yes	12/31/03	2003 Audit
3. Increase assisted housing choices					
A. Conduct outreach efforts to potential voucher landlords.	Planning Schedules	Deferred	No	---	Calendar
B. Increase Voucher Payment Standards	Board Resolution	Complying	Yes	01/21/04	Minutes
4. Provide an improved living environment					
A.1) Continue to use a PHA employee to perform protective service inspections.	2004 Budget	Complying	Yes	08/15/04	Payroll
A.2) Incorporate security improvements into CFP budgets.	5-Year Action Plan	Complying	Yes	08/15/04	CFP Budget
5. Promote self-sufficiency and asset development of families and individuals					
A. Provide or attract supportive services to increase independence for elderly or families with disabilities.	Current Services	Complying	Yes	12/31/03	Systems
6. Ensure Equal Opportunity in Housing for all Americans					
A.1) Provide information to voucher holders regarding unlawful discrimination and any recourse that may be available to them.	100%	Complying	Yes	01/01/01	Packet
A.2) Post fair housing posters in PHA offices.	Continuous	Complying	Yes	09/15/03	Front Office
A.3) Attend fair housing training.	Two Sessions	Complying	Yes	10/11/00	Personnel
A.4) Analyze and address disproportionate needs.	Annual Assessment	Complying	Yes	12/31/01	Decon. Pl.
B.1) Make reasonable accommodations.	Requests	Complying	Yes	08/15/04	Client Files
B.2) Attend fair housing training.	Two Sessions	Complying	Yes	10/11/00	Personnel
B.3) Notify agencies/organizations serving persons with disabilities of the availability of assisted housing.	Advertising	Complying	Yes	11/15/02	Wait List

7. Other PHA Goals and Objectives

A. Improve participation in Autumn Heights Resident Council by 5% each year of the planning period commencing 01/01/2000, using 35 residents as the baseline. An average of 35 residents attended meetings during the first 7 months of 1999.	35	Not Complying	No	08/15/04	Minutes
B. Include at least one staff member's attendance at one regional or national housing conference sponsored by NAHRO or PHADA each year.	One Conference Per Year	Not Complying	No	08/15/04	Personnel
C. Each full time staff member to attend at least three training conferences during the planning period.	Three Conferences Per Employee	Not Complying	No	08/15/04	Personnel
D. Complete redevelopment of the 2910 Winegard Drive site, whether by disposition and sale, <u>retention for parking</u> and excess land, development, and/or any combination of the above.	Dispose, Redevelop or <u>Reuse</u>	Complying	Yes	08/15/04	PHA Record
E. Retain "A" scores on each component of the PHAS: physical condition, financial condition, management operations and resident service and satisfaction.	"A" Scores	Complying	Yes	01/31/03	REAC
F. Paint all the public hallways within Autumn Heights including walls, ceilings and doorframes.	Painting Records	Not Initiated	No	08/15/04	PHA Record

POLICY DEFINING
“SUBSTANTIAL DEVIATION”
AND
“SIGNIFICANT AMENDMENT OR MODIFICATION”
PHAP (ia015b03.doc)

Final Rule 903.7 (r) requires a PHA to establish a policy for determining when substantial deviations or significant amendments or modifications to the Public Housing Agency Plan (PHAP) have occurred. Substantial deviations and significant amendments or modifications are Subject to the public participation requirements of 903.21 prior to their adoption.

A. The following matters are substantial deviations from the PHAP:

1. Adding a new activity to an approved *Capital Improvement Plan* (five year timetable). The PHA will utilize the practice of fungibility which permits the rescheduling of approved capital improvements to any fiscal year covered by the *Capital Improvement Plan* without the need to amend the PHAP;
2. A federal statutory or regulatory change is made effective and, in the opinion of the Authority, has either substantial programmatic or financial effects on the programs administered by the Authority, or creates substantial obligations or administrative burdens beyond the programs under administration at the start of the Plan year.
3. Adding a new program;
4. Abandoning any goal or objective that is established in the current PHAP;
5. Adding a new activity to the current PHDEP;
6. Establishing or modifying any income disregard implemented as a welfare-to-work work incentive;
7. Deviating from the PHAP in regard to demolition or disposition, designation, homeownership programs or conversion activities; and
8. Constructing new owned-housing.

B. The following are significant amendments or modifications of policy:

1. A federal statutory or regulatory change is made effective and, in the opinion of the Authority, has either substantial programmatic or financial effects on the programs administered by the Authority, or creates substantial obligations or administrative burdens beyond the programs under administration at the start of the Plan year.
2. Establishing or modifying local preferences;

3. Abandoning “flat rents” or establishing maximum rents on a basis other than market comparability (public housing only);
 4. Making substantive changes in the manner in which waiting lists are maintained and selections are made from them;
 5. Privatizing the management function; and
 6. Adopting a substantially more restrictive policy for ownership of pets in public housing.
- C. The Board of Commissioners may from time-to-time declare other contexts to be substantial deviations or significant amendments or modifications and refer these matters to the Resident Advisory Board.
- D. The following are considered to be “emergencies” and not subject to the public participation requirements of 903.21 before inclusion into a current or active modernization budget:
1. Replacing any essential maintenance or office equipment that has failed or that requires replacement due to obsolescence or wear (This includes management and systems software and computer equipment that is functioning, but that is required to be replaced to efficiently operate management or systems software or to perform essential work functions.);
 2. Accomplishing work items that are highly time-sensitive and that will have an immediate adverse affect on operations or health and safety of residents if not promptly addressed or comprising work items that have statutory or compliance deadlines;
 3. Correcting any deficiency that is a violation of Physical Condition Standards that has been identified by a HUD-assigned inspector during the performance of an inspection conducted as part of the Public Housing Assessment System; and
 4. Accomplished any activity/project that the Board of Commissioners specifically declares to be an emergency.

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

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Low Rent Housing Agency of Burlington, Iowa		Grant Type and Number Capital Fund Program Grant No: IA05P01550102 Replacement Housing Factor Grant No:			Federal FY of Grant: 2002
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no: 6) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input checked="" type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement	213,095.07		213,153.04	213,153.04
10	1460 Dwelling Structures	19,528.91		19,042.95	19,042.95
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	36,465.02		36,893.01	36,893.01
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	269,089.00		269,089.00	269,089.00
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				

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

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Low Rent Housing Agency of Burlington, Iowa		Grant Type and Number Capital Fund Program Grant No: IA05P01550102 Replacement Housing Factor Grant No:		Federal FY of Grant: 2002	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no: 6) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: X Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
25	Amount of Line 21 Related to Security – Hard Costs	8,279.05		8,337.02	8,337.02
26	Amount of line 21 Related to Energy Conservation Measures				

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

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: Low Rent Housing Agency of Burlington, Iowa			Grant Type and Number Capital Fund Program Grant No: IA05P01550102 Replacement Housing Factor Grant No:			Federal FY of Grant: 2002		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
IA015001				Original	Revised	Funds Obligated	Funds Expended	
1.	Repair/replace Bridge							Rescheduled
2.	Paving and Storm Water	1450	10,000 S.F.	213,095.07		213,095.07	213,095.07	Completed
3.	Replace Window Panels							Rescheduled
4.	Replace Low-rise Doors							Rescheduled
5.	Replace Ceiling Tiles	1460	3,500 S.F.	4,978.02		4,978.02	4,978.02	Completed
6.	Replace Lighting in Offices	1460	30	1,145.37		1,145.37	1,145.37	Completed
7.	Replace Cooking Ranges							Rescheduled
8.	Construct Storage Building							Rescheduled
9.	Security Improvements		201 Units	8,279.05				Completed
A	Site	1450				57.97	57.97	“
B	Dwelling	1460				2,712.43	2,712.43	“
C	Equipment	1475				5,566.62	5,566.62	“
10.	Procure Refrigeration Equipment	1475	1	2,912.03		2,912.03	2,912.03	Completed
11.	Replace Passenger Van	1475	1	18,966.00		18,966.00	18,966.00	Completed
12.	H-R Boiler Replacement		120 Units	9,562.20				Completed
A	Dwelling	1460				7,760.24	7,760.24	“
B	Equipment	1475				1,825.00	1,825.00	“
13.	Replace Roof Jacks	1460	80 Units	1,786.78		1,786.78	1,786.78	Completed
14.	Boiler Room Floor	1460	1	660.11		660.11	660.11	Completed
15.	Replace Tractor Cab	1475	1	2,038.27		2,038.27	2,038.27	Completed
16.	Telephone Installation Equipment	1475	1	502.19		502.19	502.19	Completed
17.	Replace JD 925 Bagging System	1475	1	3,434.83		3,435.83	3,435.83	Completed

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

Annual Statement/Performance and Evaluation Report								
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)								
Part II: Supporting Pages								
PHA Name: Low Rent Housing Agency of Burlington, Iowa			Grant Type and Number Capital Fund Program Grant No: IA05P01550102 Replacement Housing Factor Grant No:			Federal FY of Grant: 2002		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
IA015001								
18.	Replace Push Mowers (2)	1475	2	1,499.00		1,463.00	1,463.00	Completed
19.	Water Tank System	1475	1	230.08		184.07	184.07	Completed

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

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule							
PHA Name: Low Rent housing Agency of Burlington, Iowa			Grant Type and Number Capital Fund Program No: IA05P01550102 Replacement Housing Factor No:			Federal FY of Grant: 2002	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
1.							
2.	06/30/2003		06/30/2003	10/17/2003		10/17/2003	Weather and other construction problems.
3.							
4.							
5.	03/31/2003		05/22/2002	12/31/2003		05/22/2002	
6.	12/31/2002		07/31/2002	01/31/2003		07/31/2002	
7.							
8.							
9.	09/30/2004		08/07/2004	09/30/2004		09/10/2004	
10.	03/25/2003		03/25/2003	04/15/2003		04/15/2003	
11.	12/31/2002		04/09/2002	01/31/2003		06/28/2002	
12.	04/13/2002		04/19/2002	05/10/2004		05/10/2004	
13.	07/31/2003		06/26/2003	08/31/2003		06/26/2003	
14.	07/31/2003		01/06/2003	08/31/2003		03/10/2003	
15.	12/02/2003		01/28/2003	12/31/2003		12/31/2003	
16.	07/31/2003		02/03/2003	08/31/2003		02/24/2003	
17.	09/30/2004		07/31/2004	10/31/2004		11/01/2004	
18.	09/30/2004		07/31/2004	10/31/2004		09/10/2004	
19.	09/30/2004		07/31/2004	10/31/2004		09/10/2004	

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

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Low Rent Housing Agency of Burlington, Iowa		Grant Type and Number Capital Fund Program Grant No: IA05P01550103 Replacement Housing Factor Grant No:		Federal FY of Grant: 2003	
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:3) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 08/09/2004 <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	1,920.00		1,800.00	1,800.00
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition	59,500.00		59,258.67	59,258.67
9	1450 Site Improvement	25,707.14		11,997.52	10,997.52
10	1460 Dwelling Structures	71,475.74		54,844.83	54,844.83
11	1465.1 Dwelling Equipment—Nonexpendable	39,000.00		1,410.00	1,410.00
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	23,799.12		26,572.54	26,572.54
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	221,402.00		155,883.56	154,883.56
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs	9,821.84			

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

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Low Rent Housing Agency of Burlington, Iowa		Grant Type and Number Capital Fund Program Grant No: IA05P01550103 Replacement Housing Factor Grant No:		Federal FY of Grant: 2003	
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:3) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 08/09/2004 <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
25	Amount of Line 21 Related to Security – Hard Costs			9,976.74	9,976.74
26	Amount of line 21 Related to Energy Conservation Measures			16,724.93	16,724.93

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

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: Low Rent housing Agency of Burlington, Iowa			Grant Type and Number Capital Fund Program Grant No: IA05P01550103 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
1.	String Trimmer	1475	1	304.16		304.16	304.16	Completed
2.	Low-Rise Boiler Installation	1460	10	9,115.82		9,115.82	9,115.82	Completed
3.	FAX machine	1475	1	740.00		740.00	740.00	Completed
4.	Elevator Door Locks	1460	2	3,900.40		3,900.40	3,900.40	Completed
5.	Benches / Picnic Tables	1475	16	10,801.00		10,801.00	10,801.00	Completed
6.	Emergency lighting		102 Fix.	6,112.66				Completed
A.	Emergency Lighting Dwelling	1460				5,973.66	5,973.66	Completed
B.	Emergency Lighting Equipment	1475				139.00	139.00	Completed
7.	Land Purchase	1440	3 Acres	59,500.00		59,258.67	59,258.67	Completed
8.	Landscape New Parking	1450	Misc.	8,750.00		9,146.40	9,146.40	In Progress
9.	Laundry Conversion	1460	5 Rms.	6,300.95		6,221.14	6,221.14	In Progress
10.	Replace Vent Fan	1460	17	20,462.58		20,462.58	20,462.58	Completed
11.	Replace Window Panels	1460	5 Bldg.	8,500.00				In Design
12.	Replace Low-Rise Doors	1460	15	8,000.00				In Design
13.	Replace Landscape Borders	1450	2,500 L.F.	12,957.14		1,000.00		In Progress
14.	Security Improvements		Misc.	9,821.84				Completed
A.	Security Improvements Dwelling	1460				7,535.78	7,535.78	
B.	Security Improvements Equipment	1475				2,440.96	2,440.96	
15.	Bollard lighting	1450	5	4,000.00		1,851.12	1,851.12	In Progress
16.	Replace Cooking Ranges	1465.1	195	39,000.00		1,410.00	1,410.00	In Progress
17.	Replace Ricoh 5733		2	8,500.00				Completed
A.	Replace Ricoh 5733 Operating	1406				1,800.00	1,800.00	

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

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: Low Rent housing Agency of Burlington, Iowa			Grant Type and Number Capital Fund Program Grant No: IA05P01550103 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
B.	Replace Ricoh 5733 Equipment	1475				8,243.00	8,243.00	
18.	Replace Garage lights	1460	16	1,635.45		1,635.45	1,635.45	Completed
19.	Computer upgrades	1475	2	3,000.00		3,904.42	3,904.42	Completed

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

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule							
PHA Name: Low Rent Housing Agency of Burlington, Iowa			Grant Type and Number Capital Fund Program No: IA05P01550103 Replacement Housing Factor No:			Federal FY of Grant: 2003	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
1.	09/30/2003		06/30/2003	10/31/2003		07/02/2003	
2.	06/30/2004		11/15/2003	07/31/2004		12/04/2003	Activities added.
3.	09/30/2003		06/15/2003	09/30/2003		07/02/2003	
4.	09/30/2003		07/01/2003	09/30/2003		08/06/2003	
5.	09/30/2003		11/12/2003	10/31/2003		12/04/2003	Activities Added
6.	09/30/2003		10/15/2003	10/31/2004		11/18/2003	
7.	09/30/2004		06/29/2004	10/31/2004		08/05/2004	Activities added.
8.	10/31/2004		08/09/2004	12/31/2004			
9.	09/30/2005			10/31/2005			
10.	09/30/2005		11/24/2003	10/31/2005		12/07/2003	
11.	09/30/2005			10/31/2005			
12.	09/30/2005			10/31/2005			
13.	09/30/2005			10/31/2005			
14.	09/30/2005		07/26/2004	10/31/2005		08/05/2004	
15.	09/30/2005			10/31/2005			
16.	09/30/2005			10/31/2005			
17.	09/30/2005		06/16/2004	10/31/2005		07/07/2004	
18.	09/30/2005		09/25/2003	10/31/2005		11/18/2003	
19.	09/30/2004		05/24/2004	10/31/2004		06/07/2004	

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

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Low Rent Housing Agency of Burlington, Iowa		Grant Type and Number Capital Fund Program Grant No: IA05P01550203 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 2) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 08/09/2004 <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition	2,500.00	2,500.00		
9	1450 Site Improvement	5,000.00	6,449.30		
10	1460 Dwelling Structures	3,699.05	2,326.97	627.92	627.92
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	32,925.95	32,848.73	32,848.73	32,848.73
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	44,125.00	44,125.00	33,476.65	33,476.65
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				

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

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Low Rent Housing Agency of Burlington, Iowa		Grant Type and Number Capital Fund Program Grant No: IA05P01550203 Replacement Housing Factor Grant No:		Federal FY of Grant: 2003	
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 2)					
<input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 08/09/2004 <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: Low Rent housing Agency of Burlington, Iowa		Grant Type and Number Capital Fund Program Grant No: IA05P01550203 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
IA015001								
1.	Replace Pick Up Truck with Accessories	1475	1	28,000.00	26,977.55	26,977.55	26,977.55	Completed
2.	Repair/Replace Bridge	1450	1	5,000.00	6,449.30			In Design
3.	Floor Scrubber	1475	1	3,925.95	4,631.18	4,631.18	4,631.18	Completed
4.	Low-Rise Boiler Installation	1460	10	2,000.00	23.08	23.08	23.08	Completed
5.	Land Purchase (Survey)	1440	3.86 Acres	2,500.00	2,500.00			Scheduled
6.	Replace Ricoh 5733	1475	1	1,000.00	1,240.00	1,240.00	1,240.00	Completed
7.	Laundry Conversion	1460	5	1,699.05	1,699.05			In Progress
8.	Garage Heater	1460	1		604.84	604.84	604.84	Completed

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

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule							
PHA Name: Low Rent Housing Agency of Burlington, Iowa			Grant Type and Number Capital Fund Program No: IA05P01550203 Replacement Housing Factor No:			Federal FY of Grant: 2003	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
IA015001							
1.	09/30/2005		02/24/2004	10/31/2005		05/04/2004	
2.	09/30/2005			10/31/2005			
3.	09/30/2004		01/30/2004	10/31/2005		03/03/2004	
4.	05/3120/04		02/15/2004	06/30/2004		03/03/2004	
5.	09/30/2005			10/31/2005			
6.	09/30/2005		06/11/2004	10/31/2005		07/05/2004	
7.	09/3020/05			10/31/2005			
8.	09/30/2005		02/28/2004	10/31/2004		03/03/2004	

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

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Low Rent Housing Agency of Burlington, Iowa		Grant Type and Number Capital Fund Program Grant No: IA05P01550104 Replacement Housing Factor Grant No:		Federal FY of Grant: 2004	
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement	5,000			
10	1460 Dwelling Structures	135,000			
11	1465.1 Dwelling Equipment—Nonexpendable	109,000			
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	7,407			
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	256,407			
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				

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

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

PHA Name: Low Rent Housing Agency of Burlington, Iowa	Grant Type and Number Capital Fund Program Grant No: IA05P01550104 Replacement Housing Factor Grant No:	Federal FY of Grant: 2004
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X **Original Annual Statement** **Reserve for Disasters/ Emergencies** **Revised Annual Statement (revision no:)**
 Performance and Evaluation Report for Period Ending: **Final Performance and Evaluation Report**

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs	7,407			
26	Amount of line 21 Related to Energy Conservation Measures				

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

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

PHA Name: Low Rent housing Agency of Burlington, Iowa		Grant Type and Number Capital Fund Program Grant No: IA05P01550104 Replacement Housing Factor Grant No:				Federal FY of Grant: 2004		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
IA015001								
1.	Replace shingles on five low-rise buildings	1460	5 Roofs	125,000				
2.	Replace refrigerators	1465. 1	195	100,000				
3.	Install security cameras in high-rise	1475	4	7,407				
4.	Remodel high-rise community room kitchen	1460	1	10,000				
5.	Complete landscape borders	1450	2495 L.F.	5,000				
6.	Complete cooking ranges	1465. 1	195	9,000				

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

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

PHA Name: Low Rent Housing Agency of Burlington, Iowa		Grant Type and Number Capital Fund Program No: IA05P01550104 Replacement Housing Factor No:					Federal FY of Grant: 2004
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
IA015001							
1.	11/30/2005			12/31/2005			
2.	11/30/2005			12/31/2005			
3.	11/30/2005			12/31/2005			
4.	09/30/2006			10/31/2006			
5.	11/30/2005			12/31/2005			
6.	06/30/2005			07/31/2005			

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

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Low Rent Housing Agency of Burlington, Iowa		Grant Type and Number Capital Fund Program Grant No: IA05P01550105 Replacement Housing Factor Grant No:			Federal FY of Grant: 2005
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	160,000			
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures	50,000			
13	1475 Nondwelling Equipment	40,000			
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	250,000			
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				

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

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Low Rent Housing Agency of Burlington, Iowa		Grant Type and Number Capital Fund Program Grant No: IA05P01550105 Replacement Housing Factor Grant No:		Federal FY of Grant: 2005	
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: Low Rent Housing Agency of Burlington, Iowa			Grant Type and Number Capital Fund Program Grant No: IA05P01550105 Replacement Housing Factor Grant No:			Federal FY of Grant: 2005		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
IA015001								
1.	Complete High-Rise Community Room Kitchen Remodeling	1460	1	10,000.00				
2.	Remodel Kitchens and Bathrooms	1460	193	150,000.00				
3.	Reconditioned backhoe	1475	1	40,000.00				
4.	Equipment storage building	1470	1	50,000.00				

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

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule							
PHA Name: Low Rent Housing Agency of Burlington, Iowa		Grant Type and Number Capital Fund Program No: IA05P01550105 Replacement Housing Factor No:				Federal FY of Grant: 2005	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
IA015001							
1.	10/31/2007			06/30/2008			
2.	10/31/2007			11/30/2007			
3.	10/31/2007			06/30/2008			
4.	10/31/2007			11/30/2007			

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan					
Part I: Summary					
PHA Name: Low Rent Housing Agency of Burlington, Iowa				<input checked="" type="checkbox"/> Original 5-Year Plan	
				<input type="checkbox"/> Revision No:	
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2005 PHA FY: 2006	Work Statement for Year 3 FFY Grant: 2006 PHA FY: 2007	Work Statement for Year 4 FFY Grant: 2007 PHA FY: 2008	Work Statement for Year 5 FFY Grant: 2008 PHA FY: 2009
IA015001 / Autumn Heights	Annual Statement	250,000	250,000	250,000	250,000
CFP Funds Listed for 5-year planning		250,000	250,000	250,000	250,000
Replacement Housing Factor Funds					

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan					
<i>Part II: Supporting Pages—Work Activities</i>					
Activities for Year: 2008 FFY Grant: 2007 PHA FY: 2008			Activities for Year: 2009 FFY Grant: 2008 PHA FY: 2009		
Development Name/Number	Major Work Categories	<i>Estimated Cost</i>	Development Name/Number	Major Work Categories	Estimated Cost
Autumn Heights / IA015001			Autumn Heights / IA015001		
1.	Complete replacement of drapes	50,000	1.	Caulk H-R exterior	50,000
2.	Replace sidewalks	50,000	2.	Mowing equipment	20,000
3.	Remodel high-rise Community Room	10,000	3.	Water hydrant for fire protection	15,000
4.	Powder coat heat registers and fan grills	10,000	4.	Procure maintenance power equipment, including, but not limited to the following: Concrete saw, table saw, miter saw, small chain saw, mig welder and air compressor	10,000
5.	Replace bridge over pond	5,000	5.	Replace floor tile throughout	50,000
6.	Replace/expand landscaping	20,000	6.	Replace telephone lines	10,000
7.	Upgrade exterior lighting	20,000	7.	Paint apartment interiors	50,000
8.	Replace dining tables and chairs	5,000	8.	Remodel offices	20,000

13. Capital Fund Program Five-Year Action Plan

9.	Benches	12,500	9.	Remodel / redecorate L-R community and laundry rooms	25,000
10.	Replace folding chairs	2,500			
11.	Replace beauty shop equipment	5,000			
12.	Complete set of hand tools and boxes	5,000			
13.	Continue to remodel kitchens and bathrooms	55,000			
Total CFP Estimated Cost		\$250,000			\$250,000