

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

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# PHA Plans

5 Year Plan for Fiscal Years 2005 - 2009  
Annual Plan for Fiscal Year 2005

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

**PHA Plan  
Agency Identification**

**PHA Name:** Housing Authority of the County of Lake

**PHA Number:** IL-056

**PHA Fiscal Year Beginning: (mm/yyyy)** 10/2005

**Public Access to Information**

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

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

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

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

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

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

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

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

**A. Mission**

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

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- The PHA's mission is:  
Lake County Housing Authority will promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.

**B. Goals**

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

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

- PHA Goal: Expand the supply of assisted housing  
Objectives:
- Apply for additional rental vouchers:
  - Reduce public housing vacancies:
  - Leverage private or other public funds to create additional housing opportunities:
  - Acquire or build units or developments
  - Other (list below)
- PHA Goal: Improve the quality of assisted housing  
Objectives:
- Improve public housing management: (PHAS score) 87
  - Improve voucher management: (SEMAP score) 100
  - Increase customer satisfaction: With all Customers.
  - Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections)
  - Renovate or modernize public housing units: As Needed
  - Demolish or dispose of obsolete public housing:

- Provide replacement public housing:
- Provide replacement vouchers:
- Other: (list below)

PHA Goal: Increase assisted housing choices

Objectives:

- Provide voucher mobility counseling:
- Conduct outreach efforts to potential voucher landlords
- Increase voucher payment standards
- Implement voucher homeownership program:
- Implement public housing or other homeownership programs:
- Implement public housing site-based waiting lists:
- Convert public housing to vouchers:
- Other: Housing Counseling, HCV FSS, and Project Base Vouchers.

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

PHA Goal: Provide an improved living environment

Objectives:

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

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

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

Objectives:

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

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

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

**Other PHA Goals and Objectives: (list below)**

**Annual PHA Plan**  
**PHA Fiscal Year 2005**  
[24 CFR Part 903.7]

**i. Annual Plan Type:**

Select which type of Annual Plan the PHA will submit.

**Standard Plan**

**Streamlined Plan:**

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

**Troubled Agency Plan**

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

[24 CFR Part 903.7 9 (r)]

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

The Housing Authority serves the jurisdiction of Lake County, Illinois which has been identified as one of the most affluent counties in the United States and the second wealthiest the Chicago metropolitan region. Very few census tracts in the County fall within the definition of "high poverty". The area is one of high homeownership with rentals accounting for only 22% of the available units. The vacancy rate among these units is 4.7%, which is low by HUD standards. The jurisdiction lies within one of the metropolitan regions where the Department has authorized agencies to establish fair market rents at the 50<sup>th</sup> percentile.

The Authority manages 620 units of conventional public housing at 145 sites. It has 332 units for elderly residents at seven sites that include walk-up, mid-rise and high-rise buildings. The remaining 286 units for families include a 125 town home development, 133 scattered site single family homes and 28 units in multi-unit buildings at seven sites. All new admissions to the program and annually all participants are given the choice between paying an income based rent or a flat rent based on FMRs. In addition the Authority owns 6 scattered site single-family homes and Midlothian Manor a 12 unit assisted living building separate from the public housing program.

The Authority is engaged in aggressive screening to determine desirability as a tenant and lease enforcement for drug related or violent criminal activity as well as the community service requirement. The agency's modernization efforts have received high marks from the Corps of Engineers and it administers a ROSS Service Coordinator initiative.

Lake County Housing Authority's Deconcentration Policy conforms to the Departments established income ranges and reviews average incomes by developments on a quarterly basis. Given the nature of the Authority's housing stock the goal of deconcentration has generally been met due to the type, size and location of its developments.

The Housing Authority provides housing assistance through the administration of 2,603 vouchers. It operates a number of special admissions programs including the Family Unification Program, Mainstream Program for persons with disabilities, Welfare to Work Program and has committed

available assistance to the Lake County Continuum of Care effort. The payment standard is established at 110% of the increased FMR for the Chicago metropolitan area. In addition, the Authority has committed to project base up to 485 vouchers at existing developments or rehabilitated and newly constructed units. Lake County Housing Authority is also a member of the Chicago region wide Metrolinks Program and contracts with a local fair housing agency to provide mobility counseling. Finally, the Authority is responsible for the ACC administration of 586 Section 8 apartments and town homes.

The Authority maintains separate waiting lists for its Low Rent and Housing Choice Voucher Programs with approximately 4,000 families on each of its waiting lists. Both programs share common preferences that include preferences for residency in Lake County, victims of domestic violence, the elderly and the disabled.

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

[24 CFR Part 903.7 9 (r)]

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

#### **Table of Contents**

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#### **Attachments**

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

Required Attachments:

- Admissions Policy for Deconcentration **ATTACHMENT IL056 a05**
- FY 2005 Capital Fund Program Annual Statement  
**ATTACHMENT IL056 i05**
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

Optional Attachments:

- PHA Management Organizational Chart
- FY 2005 Capital Fund Program 5 Year Action Plan
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text) **ATTACHMENT IL056 h05**
- Other

**ATTACHMENT IL056 j05-CFP P&E 2001**  
**ATTACHMENT IL056 k05- CFP P&E 2002**  
**ATTACHMENT IL056 l05- CFP P&E 2003**  
**ATTACHMENT IL056 m05- CFP P&E 2003-1**  
**ATTACHMENT IL056 n05- CFP P&E 2004**  
**ATTACHMENT IL056 p05- The Regional Housing Initiative**

**Supporting Documents Available for Review**

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

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: 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	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	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	Annual Plan: Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
X	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
	The most recent Public Housing Drug Elimination Program (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

## **1. Statement of Housing Needs**

[24 CFR Part 903.7 9 (a)]

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

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

<b>Housing Needs of Families in the Jurisdiction by Family Type</b>							
Family Type	Overall	Afford- ability	Supply	Quality	Access- ibility	Size	Loca- tion
Income <= 30% of AMI	4,177	5	5	3	3	3	2
Income >30% but <=50% of AMI	1,990	4	5	3	3	3	2
Income >50% but <80% of AMI	894	4	5	2	3	2	2
Elderly	8,990	5	4	3	3	1	1
Families with Disabilities	NA	NA	5	NA	4	NA	NA
White Non- Hispanic	50,923	NA	5	NA	NA	NA	NA
Black Non- Hispanic	3,385	NA	5	NA	NA	NA	NA
Hispanic	2,900	NA	5	NA	NA	NA	NA

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

- Consolidated Plan of the Jurisdiction/s  
Indicate year:
- U.S. Census data: the Comprehensive Housing Affordability Strategy (“CHAS”) dataset CHAS Table 1C- Lake County, IL 2000
- American Housing Survey data  
Indicate year:
- Other housing market study  
Indicate year:
- Other sources: (list and indicate year of information)

## **B. B1 Housing Needs of Families on the Public Housing**

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

<b>Housing Needs of Families on the Waiting List</b>
--

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	4,809		131
Extremely low income <=30% AMI	4,215	88%	
Very low income (>30% but <=50% AMI)	506	11%	
Low income (>50% but <80% AMI)	73	2%	
Families with children	3,400	71%	
Elderly families	323	7%	
Families with Disabilities	1,253	26%	
Black	2,950	61%	
Hispanic	445	9%	
White	1,355	28%	
Other	59	1%	
Characteristics by Bedroom Size (Public Housing Only)			
0BR	0	0	8
1BR	1,466	30%	58
2 BR	1,941	40%	18
3 BR	1,083	23%	42
4 BR	281	6%	5
5 BR	32	1%	0
5+ BR	6	<1%	0
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?			
<input type="checkbox"/> No <input type="checkbox"/> Yes			

## B2. Housing Needs of Families on the Section 8- Housing Choice Voucher Program Waiting Lists

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	6,036		172
Extremely low income <=30% AMI	5,285	88%	
Very low income (>30% but <=50% AMI)	644	11%	
Low income (>50% but <80% AMI)	89	1%	
Families with children	3,980	66%	
Elderly families	845	14%	
Families with Disabilities	1,463	24%	
Black	3,330	55%	
Hispanic	542	9%	
White	2,087	35%	
Other	77	1%	
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 checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?			
<input type="checkbox"/> No <input type="checkbox"/> Yes			

### C. Strategy for Addressing Needs

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

**(1) Strategies**

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

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

Select all that apply

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

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

Select all that apply

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

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

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

Select all that apply

- Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing

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

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

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

Select all that apply

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

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

**Strategy 1: Target available assistance to the elderly:**

Select all that apply

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

**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) Award a preference to a person with a disability.

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

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

Select if applicable

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

**Strategy 2: Conduct activities to affirmatively further fair housing**

Select all that apply

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

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

**(2) Reasons for Selecting Strategies**

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

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

**2. Statement of Financial Resources**

[24 CFR Part 903.7 9 (b)]

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

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2004 grants)</b>		
a) Public Housing Operating Fund	1,048,545	
b) Public Housing Capital Fund	1,188,142	
c) HOPE VI Revitalization	0	
d) HOPE VI Demolition	0	
e) Annual Contributions for Section 8 Tenant-Based Assistance	21,288,489	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	0	
g) Resident Opportunity and Self-Sufficiency Grants	0	
h) Community Development Block Grant	0	
i) HOME	0	
Other Federal Grants (list below)		
<b>Housing Counseling</b>	24,107	
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
2003	144,396.26	
2003-1	4,015.40	
2004	1,119,624.11	
<b>3. Public Housing Dwelling Rental Income</b>	1,603,180	
<b>Summer Food Program</b>	21,707	
<b>4. Other income (list below)</b>		
Roof Top Lease	32,280	
<b>Investment Income</b>	20,030	
<b>4. Non-federal sources (list below)</b>		
<b>Total resources</b>	26,464,516	

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

## **A. Public Housing**

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

### **(1) Eligibility**

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

- When families are within a certain number of being offered a unit: (state number)
- When families are within a certain time of being offered a unit: (state time)
- Other: When families reach top of the waiting list.

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 Credit History

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

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

e.  Yes  No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

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

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

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

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

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

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

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

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

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

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

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

### **(3) Assignment**

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

- One
- Two
- Three or More

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

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

### **(4) Admissions Preferences**

a. Income targeting:

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

b. Transfer policies:

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

- Emergencies
- Overhoused
- Underhoused
- Medical justification
- Administrative reasons determined by the PHA (e.g., to permit modernization work)
- Resident choice: (state circumstances below)
- Other: As reasonable accommodation or in response to hate crime.

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

- Working families and those unable to work because of age or disability
- Veterans and veterans’ families
- Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) Elderly, disabled and persons in nursing homes who could be discharged except for their inability to afford housings.

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.

## 2 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans’ families
- Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) Elderly, disabled and persons in nursing homes who could be discharged except for their inability to afford housings.

4. Relationship of preferences to income targeting requirements:

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

## **(5) Occupancy**

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

- The PHA-resident lease
- The PHA’s Admissions and (Continued) Occupancy policy
- PHA briefing seminars or written materials
- Other source: Resident orientation video and Tenant Handbook

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

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

**(6) Deconcentration and Income Mixing**

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

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

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

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

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

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

Other (list policies and developments targeted below)

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

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

- Additional affirmative marketing
- Actions to improve the marketability of certain developments
- Adoption or adjustment of ceiling rents for certain developments

- Adoption of rent incentives to encourage deconcentration of poverty and income-mixing
- Other (list below)

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

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

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

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

## **B. Section 8**

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

### **(1) Eligibility**

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

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

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:

PHA give 180-day period to search for a unit with new extensions.

### **(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) Elderly, disabled and persons in nursing homes who could be discharged except for their inability to afford housings.

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.

2      Date and Time

Former Federal preferences

- 2      Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- 2      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) Elderly, disabled and persons in nursing homes who could be discharged except for their inability to afford housings.

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

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

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

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

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

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

### **(5) Special Purpose Section 8 Assistance Programs**

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

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

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

- Through published notices
- Other: Notification of non-profit organizations and municipalities.

## **4. PHA Rent Determination Policies**

[24 CFR Part 903.7 9 (d)]

### **A. Public Housing**

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

#### **(1) Income Based Rent Policies**

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

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

**See: ATTACHMENT IL056 g05**

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

1.  Yes  No: Does the PHA plan to charge rents at a fixed amount or percentage less than 30% of adjusted income?
2. If yes to above, list the amounts or percentages charged and the circumstances under which these will be used below:
- d. Which of the discretionary (optional) deductions and/or exclusions policies does the PHA plan to employ (select all that apply)
- For the earned income of a previously unemployed household member
  - For increases in earned income
  - Fixed amount (other than general rent-setting policy)  
If yes, state amount/s and circumstances below:
  - Fixed percentage (other than general rent-setting policy)  
If yes, state percentage/s and circumstances below:
  - For household heads
  - For other family members
  - For transportation expenses
  - For the non-reimbursed medical expenses of non-disabled or non-elderly families
  - Other (describe below)

e. Ceiling rents

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

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

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

- For all developments
- For all general occupancy developments (not elderly or disabled or elderly only)
- For specified general occupancy developments
- For certain parts of developments; e.g., the high-rise portion

- For certain size units; e.g., larger bedroom sizes
- Other (list below)

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

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

f. Rent re-determinations:

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

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

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

## **(2) Flat Rents**

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

- The section 8 rent reasonableness study of comparable housing
- Survey of rents listed in local newspaper
- Survey of similar unassisted units in the neighborhood
- Other: Development operating costs and FMR.

## B. Section 8 Tenant-Based Assistance

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

### (1) Payment Standards

Describe the voucher payment standards and policies.

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

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

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

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

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

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

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

- Annually
- Other (list below)

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

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

**(2) Minimum Rent**

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

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

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

**See: ATTACHMENT IL056 g05**

**5. Operations and Management**

[24 CFR Part 903.7 9 (e)]

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

**A. PHA Management Structure**

Describe the PHA’s management structure and organization.

(select one)

- An organization chart showing the PHA’s management structure and organization is attached. **IL056 o05- LCHA Organizational Chart**
- A brief description of the management structure and organization of the PHA follows:

**B. HUD Programs Under PHA Management**

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

<b>Program Name</b>	<b>Units or Families Served at Year Beginning</b>	<b>Expected Turnover</b>
Public Housing	601	130`
Section 8 Vouchers	2,550	480
Section 8 Certificates	0	0
Section 8 Mod Rehab	0	0
Special Purpose Section	0	0

8 Certificates/Vouchers (list individually)		
Public Housing Drug Elimination Program (PHDEP)	0	0
Other Federal Programs(list individually)		
Housing Counseling	98	98

### C. Management and Maintenance Policies

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

- (1) Public Housing Maintenance and Management:  
Admissions and Continued Occupancy Policy, Lease with Addenda and Riders, Rent Collection Policy, Economic Self Sufficiency and Community Service Policy, Deconcentration Policy, Pet Policy, Maintenance Charge Policy and Schedule of Charges, Grievance Procedures, Housekeeping Standards, Occupancy Policy, Maintenance Policy, Pest Eradication Policy, Preventive Maintenance Plan.
- (2) Section 8 Management: Section 8 Adm. Plan.

## 6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

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

### A. Public Housing

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

If yes, list additions to federal requirements below:

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

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

**B. Section 8 Tenant-Based Assistance**

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

If yes, list additions to federal requirements below:

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

- PHA main administrative office  
 Other (list below)

**7. Capital Improvement Needs**

[24 CFR Part 903.7 9 (g)]

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

**A. Capital Fund Activities**

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

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

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

Select one:

The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name) *See: ATTACHMENT IL056 i05*

-or-

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

## **(2) Optional 5-Year Action Plan**

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

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

b. If yes to question a, select one:

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

-or-

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

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

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

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

1. Development name:

2. Development (project) number:

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

Revitalization Plan under development

- Revitalization Plan submitted, pending approval
- Revitalization Plan approved
- Activities pursuant to an approved Revitalization Plan underway

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

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

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

## **8. Demolition and Disposition**

[24 CFR Part 903.7 9 (h)]

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

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

### 2. Activity Description

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

<b>Demolition/Disposition Activity Description</b>
1a. Development name:
1b. Development (project) number:
2. Activity type: Demolition <input type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one) Approved <input type="checkbox"/>

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

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

[24 CFR Part 903.7 9 (i)]

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

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

2. Activity Description

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

<b>Designation of Public Housing Activity Description</b>
1a. Development name:
1b. Development (project) number:
2. Designation type:
Occupancy by only the elderly <input type="checkbox"/>

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

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

[24 CFR Part 903.7 9 (j)]

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

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

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

#### 2. Activity Description

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

<b>Conversion of Public Housing Activity Description</b>	
1a. Development name:	
1b. Development (project) number:	
2. What is the status of the required assessment?	<input type="checkbox"/> Assessment underway

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

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

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

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

[24 CFR Part 903.7 9 (k)]

**A. Public Housing**

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

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

2. Activity Description

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

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

**B. Section 8 Tenant Based Assistance**

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

2. Program Description:

a. Size of Program

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

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

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

b. PHA-established eligibility criteria

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

If yes, list criteria below:

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

[24 CFR Part 903.7 9 (l)]

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

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

1. Cooperative agreements:

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

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

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

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

**B. Services and programs offered to residents and participants**

**(1) General**

a. Self-Sufficiency Policies

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

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

b. Economic and Social self-sufficiency programs

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

<b>Services and Programs</b>				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)
Elderly Service Coordinator	198	Elderly Residents	Developments	Public Housing

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

a. Participation Description

<b>Family Self Sufficiency (FSS) Participation</b>		
Program	Required Number of Participants (start of FY 2005 Estimate)	Actual Number of Participants (As of: 04/01/05)
Public Housing	0	0
Section 8	146	104

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

**C. Welfare Benefit Reductions**

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)
- Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies
  - Informing residents of new policy on admission and reexamination

- Actively notifying residents of new policy at times in addition to admission and reexamination.
- Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
- Establishing a protocol for exchange of information with all appropriate TANF agencies
- Other: (list below)

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

### **13. PHA Safety and Crime Prevention Measures**

[24 CFR Part 903.7 9 (m)]

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

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

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

(select all that apply)

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

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

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

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

3. Which developments are most affected? IL06-PO56-OO1 Marion Jones

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

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

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

2. Which developments are most affected? IL06-PO56-OO1 Marion Jones

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

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

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

2. Which developments are most affected? IL06-PO56-OO1 Marion Jones

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

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

- Yes  No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes  No: Has the PHA included the PHDEP Plan for FY 2005 in this PHA Plan?
- Yes  No: This PHDEP Plan is an Attachment. (Attachment Filename: \_\_\_\_)

#### **14. RESERVED FOR PET POLICY**

[24 CFR Part 903.7 9 (n)]

*See: ATTACHMENT IL056 b05*

#### **15. Civil Rights Certifications**

[24 CFR Part 903.7 9 (o)]

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

#### **16. Fiscal Audit**

[24 CFR Part 903.7 9 (p)]

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

#### **17. PHA Asset Management**

[24 CFR Part 903.7 9 (q)]

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

1.  Yes  No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock, including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and

other needs that have **not** been addressed elsewhere in this PHA Plan?

2. What types of asset management activities will the PHA undertake? (select all that apply)

- Not applicable
- Private management
- Development-based accounting
- Comprehensive stock assessment
- Other: (list below)

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

### **18. Other Information**

[24 CFR Part 903.7 9 (r)]

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

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

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

- Attached at Attachment (File name) **See: ATTACHMENT IL056 h05**
- Provided below:

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

- Considered comments, but determined that no changes to the PHA Plan were necessary.
- The PHA changed portions of the PHA Plan in response to comments  
List changes below:
- Other: (list below)

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

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

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

3. Description of Resident Election Process

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

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

b. Eligible candidates: (select one)

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

c. Eligible voters: (select all that apply)

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

**C. Statement of Consistency with the Consolidated Plan**

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

1. Consolidated Plan jurisdiction: County of Lake, IL
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
- The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.  
 The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.  
 The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.  
 Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)

Other: (list below)

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

**D. Other Information Required by HUD**

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

## **Attachments**

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

## **ATTACHMENT IL056 a05**

### **DECONCENTRATION POLICY**

It is the policy of the Lake County Housing Authority to promote economic integration within its general occupancy developments (family housing) all of which exist as scattered site housing or are defined by the Department of Housing and Urban Development as “small developments”. In general, because of the nature of the Authority’s housing stock, developments with average incomes outside of the established income range may be regarded as having met the goals of deconcentration by virtue of their size, location and/or configuration. However, in order to evaluate the status of its developments the Authority will regularly collect and analyze income data.

Based on income data collected each month, the Authority shall determine annually the average income of all families residing in its general occupancy developments. Family housing developed in conjunction with elderly housing projects will be considered separate general occupancy developments for the purposes of this policy. Families with incomes above 115 % of the average shall be deemed high income and those below 85 % of the average shall be designated as low-income families.

Annually, based on income data collected monthly, the Authority shall determine the average income for each general occupancy development. Developments with average incomes above 115% of the overall average for Authority residents residing in family housing shall be designated high income developments while those with average incomes below 85 % the overall average for Authority residents residing in general occupancy developments shall be designated low income developments.

The Authority recognizes that income data appearing on the pre-application may not be current when the family’s name rises to the top of the waiting list. The Low Rent Program will encourage families on the waiting list to update information. It is the family’s responsibility to respond with current information in order to assure the offer of an appropriate unit. The Housing Authority cannot be held liable for improper skipping where a family neglects to provide current information. Further, the procedure and product of skipping is not subject to the Authority’s Grievance Procedures.

When a unit becomes available in a high-income development, the Authority may skip families on its waiting list, if necessary, to make the offer of the unit to a family with an income below the overall average. Similarly, when a unit becomes available in a low-income development, the Authority may skip families on its waiting list, if necessary, to make an offer of the unit to a family having an income above the overall Authority average. If the waiting list does not contain a family in the desired income category for the next available unit of family housing the Authority will offer the unit to the first family on the waiting list. In managing its waiting list to achieve economic integration the Authority may apply preferences except if using them would result in either offering a unit in a high income development to a family with income above the overall average or offering a unit in a low income development to a family with income below the overall

average. These restrictions shall not apply to a family offered a unit as a result of a preference based on domestic violence.

Any family rejecting the offer of a unit resulting from skipping shall retain its position on the waiting list subject to the list's periodical re-ranking.

At its discretion the Authority may evaluate income averages for general occupancy developments either monthly or quarterly to monitor the effects of its deconcentration procedures. Developments with average incomes between 115% and 85% of the overall average income shall be regarded as economically stable and integrated and newly vacated units within those developments exempt from deconcentration procedures until such time as the established income range is exceeded. In order to maintain economic integration, stable developments shall be evaluated at the same time as non-stable developments. Where imbalances reemerge beyond the established income range, a general occupancy development will again be subject to deconcentration procedures unless they may be regarded as having met deconcentration goals due to their size, location or configuration.

## ATTACHMENT IL056 b05

### **PET POLICY**

All pet owners or residents wishing to own a pet shall be required to complete a Pet Application in the form prescribed by the Housing Authority. It may limit the number and type of pets a household is allowed based on the size of the unit, the activity level needed by the pet and the exercise that the resident will provide the pet. No dog of the AKC breeds Stafford shire Bull Terrier and American Stafford shire Terrier or any other breed or mixed breed commonly known, as "pit bull" shall be permitted.

#### **Pets Permitted**

Only common domesticated household pets may be maintained on Authority property. These are dogs, cats, ferrets, gerbils, guinea pigs, hamsters, rabbits, fish, turtles and caged birds. Reptiles are prohibited. Cats may not weigh more than 15 pounds. Dogs may not weigh more than 35 pounds and/or stand 24 inches from the ground to the top of the head. The capacity of aquariums shall not exceed 20 gallons.

#### **Application**

Pet Applications must be completed as part of the admissions process or prior to an existing resident's acquisition of a pet. The Application must be renewed at the pet owners annual re-cert and evidence of current licensure presented. Pets will only be allowed upon the approval of the Application by the Authority. At admission the Application must be accompanied by appropriate proof that the pet is licensed if so required by the municipality in which the unit is located and that the animal has received inoculations for rabies and other communicable diseases. A photograph of each pet must be provided to the Authority. Residents wishing to become pet owners may receive conditional approval of an Application provided they agree to submit the same inoculation documentation and a photograph after the pet joins the household. The Application must provide for at least one affidavit of agreement signed by someone other than a household member to care for the pet in the event that illness or other circumstance prevents the owner from providing appropriate levels of care. The Application will also require consent of the owner to allow the Authority to place the pet in the care of a veterinarian or reputable pet care agency should the Authority be unable to contact the alternate caregiver within 24 hours or the alternate caregiver refuses assistance. Such action would be taken at the expense of the owner. Residents who are not current on their rent or any repayment agreement may not apply for pet ownership.

#### **Deposit and Charges**

A pet deposit of \$300 will be required to be submitted with the Application except at buildings housing elderly residents where the pet deposit will be equal to the household's security deposit but not to exceed \$300. The deposit will be returned when the household

vacates the unit unless its use is necessary to cure problems created directly or indirectly by pet ownership.

The Authority may recover costs it incurs that are associated with its obtaining appropriate care for the pet in the event the owner is incapacitated and the alternate caregiver is unavailable or refuses assistance. The Authority shall charge an amount equal to its cost for an hour's labor for removing pet waste beginning with the onset of each hour of labor.

### Restrictions

1. Pet owners or alternate caregivers shall be responsible for the removal of all pet waste. All dog waste outdoors shall be scooped and properly disposed of and cat litter will be securely bagged before depositing it in garbage containers. Cages and aquariums shall be regularly cleaned and maintained in a manner that does not cause offensive odor.
2. Dogs and cats shall be restrained by leash or harness and under human control whenever they are outside the unit, indoors or outdoors.
3. Dogs and cats must wear collars at all time with appropriate licensure and valid rabies tag displayed.
4. Pets conventionally housed in cages, terraria or aquaria shall be so housed.
5. Dogs, cats and rabbits shall be neutered before they reach six months of age and documentation to that effect provided the Authority.
6. Pets must be under control at all times. Pet owners are responsible for the behavior of their animals at all times. Pets shall not be allowed to disturb the right of other resident's or neighbor's peaceful enjoyment of the premises due to noise, odor, threatening or physically harming behavior, vermin or parasites.
7. Pets are not allowed in any common area of a building except for egress or ingress to and from the closest entrance to the pet owner's unit.
8. No animal found to be dangerous or deemed to be vicious shall be permitted on Authority property.
9. Pet owners and other residents are responsible for visiting pets, which are subject to the same restrictions recited in this policy.
10. Pet owners shall indemnify the Authority and hold it harmless against loss or liability of any kind arising from their pets.
11. Cases of inappropriate care, abuse or abandonment shall be referred for investigation to animal control authorities or the Humane Society and the owner shall hold harmless the Authority for such referrals mad in good faith.

### Exemptions

The Authority shall, as a reasonable accommodation, waive elements of the Pet Policy for persons with disabilities. Nothing herein shall hinder full access to units and common areas by persons with disabilities who utilize certified guide dogs, signal dogs or other service dogs.

### Enforcement

Any resident or employee of the Housing Authority observing a violation of the Pet Policy shall report the infraction to the Low Rent Housing Management. The pet owner shall be served written notice of the violation and means necessary to avoid future violations. The notice shall inform the pet owner that subsequent violations of the Policy may be grounds for the termination of pet ownership or the lease. In the event of repeated violations the Authority shall act to terminate tenancy in accordance with provisions of the lease, which include notification that the Authority's actions are subject to its Grievance Procedures.

## **ATTACHMENT IL056 c05**

### **IMPLEMENTATION OF COMMUNITY SERVICE REQUIREMENTS**

Pursuant to HUD regulations the Authority's Board of Commissioners adopted a policy requiring that households receiving TANF assistance perform 8 hours of community service each month and amended the low rent housing program lease to incorporate this requirement after allowing for the statutory period for resident review and comment. In advance of this action, all non-elderly public housing residents were provided a copy of the proposed policy and the amended lease language. Additionally, the Authority entered into a cooperation agreement with the State of Illinois Department of Human Services for the exchange of information related to TANF participation.

In implementing the policy the Authority originally examined its rent roster to determine which covered households received TANF benefits and were subject to the community service requirement. Those households were provided additional notice of their obligations and were given a sample list of the types of agencies or organizations through which the volunteer community service requirement could be met. They were also provided with community service work verification forms to be completed by the supervisor at the agency or organization site where the work is performed.

The Community Service Policy has been included as part of the Handbook for new admissions and is discussed in resident orientation meetings prior to occupancy.

Each month the Authority reviews its rent roster to determine which households are covered by the policy and sends letters reminding TANF recipients of their responsibility under the lease. Those that do not verify that they have met the community service requirement are informed of their obligation to make up their community service deficit or enter into an agreement with the Authority to do so at their first annual recertification following the policy's adoption. Further, they are put on notice that failure to enter into an agreement or comply with its conditions will result in the non-renewal of their lease beyond its term.

**ATTACHMENT IL056 d05**

**SECTION 8 HOMEOWNERSHIP CAPACITY STATEMENT**

Lake County Housing Authority is in the process of developing policies to govern the use of Section 8 resources to assist program participants become homeowners. The Authority envisions limiting eligibility to those Section 8 families that have been enrolled in the Family Self Sufficiency Program for one or more years; do not owe the Authority any money; have the ability to make a minimal down payment from their own savings; have sufficient income to support principal, interest, tax and insurance obligations; attend housing counseling; and, are able to qualify for a governmentally insured or private sector loan meeting generally acceptable underwriting standards.

*Lake County Housing Authority is recognized by the Department as a Comprehensive Housing Counseling Agency and has received HUD support for that service. In previous years the Authority administered a County CDBG funded shared equity homeownership program for first time buyers. The County opted to shift responsibility for that program to its Affordable Housing Commission upon its creation.*

## **ATTACHMENT IL056 e05**

### **STATEMENT OF PROGRESS**

Lake County Housing Authority continues to provide its low rent program residents with safe and well maintained housing and services as evidenced by its high marks on Resident Satisfaction and PHDEP surveys. Its modernization program has proceeded in an orderly fashion with funds obligated and expended within program requirements. The quality of documentation and physical work has consistently been praised by the Army Corps of Engineers personnel during their on site inspections. The Authority has also applied for and received ROSS funding for Service Coordinators and contracted with a local social service agency to provide those services to elderly residents to increase their independence and well being. During the year the Authority adopted new admissions preferences for the Section 8 and public housing programs to better meet the housing needs of disabled and elderly persons. The Authority has picked up additional Section 8 vouchers as a result of "opt out" by two developments and has filled 100% of its Welfare to Work allocation received through the regional Metrolinks consortium. Additionally, through Metrolinks, the Authority received a MacArthur Foundation grant to contract with the Fair Housing Center of Lake County to provide mobility counseling to recipients of Section 8 vouchers and recruit new property owners for the program who have rental units in higher income census tracts.

## **ATTACHMENT IL056 f05**

### **DEFINITIONS**

**Significant Amendment or Modification:** Any material change to the lease or policies therein incorporated by reference, admissions and occupancy policy, waiting list management or the methodology by which flat rents are calculated. They do not apply to any change that is mandated by regulation.

*Substantial Deviation: The addition of new activities not contained in the most recent PHDEP plan or non-emergency work items in the Capital Fund Annual Statement unless those items have been identified in the Capital Fund Five Year Plan or most recent Comprehensive Grant Program Needs Assessment statement. It does not apply to allowable PHDEP budget deviations or differences between cost estimates and actual costs for work undertaken through the Capital Fund Program or work items where the Authority has exercised allowable fungibility.*

## ATTACHMENT IL056 g05

### Hardship Exemption Policy for Minimum Rent

The Lake County Housing Authority has set the minimum rent at \$50.00. However if the family requests a hardship exemption, the Lake County Housing Authority will immediately suspend the minimum rent for the family until the Housing Authority can determine whether the hardship exists and whether the hardship is of a temporary or long-term nature.

- A. A hardship exists in the following circumstances:
1. When the family has lost eligibility for or is awaiting an eligibility determination for a Federal, State, or local assistance program;
  2. When the family would be evicted as a result of the imposition of the minimum rent requirement;
  3. When the income of the family has decreased because of changed circumstances, including loss of employment;
  4. When the family has an increase in expenses because of changed circumstances, for medical costs, childcare, transportation, education, or similar items;
  5. When a death has occurred in the family.
- B. No hardship. If the Housing Authority determines there is no qualifying hardship, the minimum rent will be reinstated, including requiring back payment of minimum rent for the time of suspension.
- C. Temporary hardship. If the Housing Authority reasonably determines that there is a qualifying hardship but that it is of a temporary nature, the minimum rent will not be imposed for a period of 90 days from the date of the family's request. At the end of the 90-day period, the minimum rent will be imposed retroactively to the time of suspension. The Housing Authority will offer a repayment agreement in accordance with Section 19 of this policy for any rent not paid during the period of suspension. During the suspension period the Housing Authority will not evict the family for nonpayment of the amount of tenant rent owed for the suspension period.
- D. Long-term hardship. If the Housing Authority determines there is a long-term hardship, the family will be exempt from the minimum rent requirement until the hardship no longer exists.

- E. Appeals. The family may use the grievance procedure to appeal the Housing Authority's determination regarding the hardship. No escrow deposit will be required in order to access the grievance procedure.

**ATTACHMENT IL056 h05**

**Resident Advisory Board Meeting**

The meeting of the Resident Advisory Board was held at Lake County Housing Authority on Friday, April 8, 2005 at 2:00 PM. Present at the meeting were:

Karen Blatcher, LCCIL  
John Donald, Beach Haven Tower  
Dorothy Hoffmeier, Shiloh Towers  
Maere Floyd-Pitts, Marion Jones  
Elizabeth Sheehan, Orchard Manor  
Alon Jeffrey, Executive Director  
David Northern, Deputy Director  
Evelyn Peters, Low Rent Support

*Alon Jeffrey opened the meeting by advising the attendees of the following information concerning current affairs in Washington. The Administration's budget proposal for the Department of Housing and Urban Development is satisfactory for Section 8, however is not particularly good for Low Rent Public Housing. The last 2 years been funded for Public Housing operating expenses at 89% of the formula, and appears this year's proposal will cut back to 85% funding. When the Quality Housing and Work Responsibility Act of 1998 passed, part of the act was to establish a new formula to produce a subsidy and has been in effect since 1974. HUD and trade groups have since reached the conclusion it did not have enough information to devise a new formula. In approximately 2000, Congress then stepped in and directed HUD to contract with Harvard School of Architect Design to conduct a study on how to devise a new formula. After approx. 2-3 yrs work, HUD received some recommendations, and at same time Congress directed a procedure in which there is an attempt to reach a consensus on how to design formula. This Group finished their work last summer, and thought there was a complete set of agreements, which would then be translated into a Federal Regulation. The proposal would then be submitted to the office of Management and Budget. What has come back out does not look like what the agreed upon formula was to look like, in fact, it now appears there will be a 30% cut funding wise of the new formula. However, if the new formula were implemented, LCHA would still receive more funding than currently received, but defies the entire process, which was to produce a process approved by all parties concerned. Final proposals for comment are expected to be released imminently.*

*Mr. Jeffrey next addressed the second aspect of the proposal, which is its effective date. Under the current proposal for the 2006 fiscal year budget which takes effect October 1, 2005, in which we are expected to received 85% funding of the old formula. Under the new formula, even cut back 30%, LCHA would receive more money than if funded at 100% of old formula. HUD and various trades agreed that an increase in funding would be phased in over 2 years, while a funding decrease would be phased in over 4 years. The OMB response came back just opposite - 4 years for an increase, 2 years for a decrease. In this year's Administration budget proposal, there is a reduction in the capital fund program, which funds various projects.*

*Mr. Jeffrey related that the Beach Haven design contract has been let with the same design company as Shiloh Tower. The contractor to complete the renovation will be determined through bids. Mr. Jeffrey further stated there were not sufficient funds to complete renovation work on Shiloh Tower & Beach Haven Tower simultaneously. John Donald inquired as to when construction work at Beach Haven would begin. David Northern advised that construction would most likely not begin until August or September, as it is necessary to conduct the bidding, initiates material orders, etc. Pre-construction items such as selecting tile color, etc. has been ongoing. Dorothy Hoffmeier stated that the recent Shiloh renovation was very well done.*

Mr. Jeffrey next informed members that HUD is expected to submit new legislation governing both Section 8 and parts of the Public Housing programs, entitled the *State and Local Housing Flexibility Act of 2005*. Information obtained from the internet and released by a trade group April 4, 2005; contains many significant proposed changes; primarily in Section 8, but some also in Public Housing. Mr. Jeffrey explained the points expected to be proposed:

- 1). Eligibility to be set at 80% of median income, but target not fewer than 90% of families issued vouchers during any one year period have incomes that are at or below 60%. Targeting right now is 75% of new admissions at or below 30%, expanding the range of targeting.
- 2). PHA's may establish term limits to determine the maximum amount of time during which a family may receive rental assistance. Beginning on January 1, 2008, term limits shall not be less than 5 years.
- 3) They also are proposing a change of the annual recertification – reducing the recertification to at least once every 2 years, and for persons who are elderly or disabled, once every 3 years instead of annually.
- 4) In the Section 8 program, Housing Authority would be only required to inspect 25% of the contracted properties each year. In effect, meaning each property would be inspected once every 4 years. Mr. Jeffrey commented that it is easily recognized that the intention is to reduce administrative monies, and expect therefore to cut staff by not requiring the volume of inspections and/or recertifications.

Karen Blatcher inquired as to what affect the two-year recertification would have on a participant regarding changes in their income. Mr. Jeffrey advised that he does not believe they intend to change the requirement that if a participant's income decreases they can request a deduction.

Mr. Jeffrey further stated another factor to consider is called *rent flexibility*; and is defined by HUD as follows:

*A PHA shall determine the amount of any monthly assistance payment by a family in setting rent for a family, a PHA may establish*

1. *A flat amount of rent a family shall pay and shall adjust such rent on the basis of an annual cost index or;*
2. *The rent a family shall pay based on an income tier rent structure in which the amount of rent a family shall pay is set and distributed on basis of broad tiers of income and such tiers and rents shall be adjusted on the basis of an annual cost index;*
3. *A rent structure in which the amount of rent is based on a percentage of family income;*
4. *A rent structure in which the amount of rent a family shall pay is based on the current rent provisions; or*

5. *Any combination of the above.*

Mr. Jeffrey explained that he feels the intention of this rent flexibility is for example, allowing the Housing Authority to set a flat rent for section 8 participants by bedroom size. The exception, valid until January 1, 2009, states elderly families and disabled families who currently receive voucher assistance or public housing assistance would be treated in accordance with the current procedures. *If an elderly or disabled family begins receiving assistance after enactment of the statute they would receive similar treatment under this section unless and until the local housing authority develops and implements a policy that would ensure that the needs of assisted elderly and disabled families are met.* Possibly, the intent is to have a hold harmless for seniors and disabled families to eliminate an unreasonable increase in rents paid by these families.

Ms. Hoffmeier inquired as to whether the current 30% formula would change. Mr. Jeffrey advised that there is no mention of any change in the current rent calculation of 30%.

Mr. Jeffrey stated another item in the Section 8 program proposal relates to voucher portability – currently transferable anywhere in the United States. This act would seem to restrict portability to a much more local area. A PHA may enter into agreements with other PHAs within the same state or region to facilitate the ability of transfer eligible families to transfer their voucher assistance to another jurisdiction within the same state or region. PHAs may establish under certain circumstances, regions encompassing more than one state or District of Columbia. So, instead of having a national program, it would be regionalized. Mr. Jeffrey is of the opinion, in the Chicagoland area, LCHA would be able to permit transfers anywhere in Illinois, perhaps Southern Wisconsin and possibly Northern Indiana.

Lastly, regarding Section 8, enhanced voucher – when a private owner who held a project based voucher withdraws from the Section 8 program and opts out of the subsidized program, LCHA is awarded vouchers to make certain those participants do not get displaced from the property on the day the owners rental assistance contract ends. The proposal is to make these enhanced vouchers valid for only one year.

Mr. Jeffrey next addressed the Public Housing program, stating the proposal uses the same set of rent setting policies as for Section 8 (above), with one difference, Section 8 proposal does not require a minimum rent, but the proposal indicates families in the Public Housing program will pay a minimum monthly rent amount to be established by the PHA. By law, PHAs must set a minimum rent – currently set at zero by LCHA. It is proposed to include in the PHA Admin Plan, the option of raising the minimum rent in public housing if financial circumstances warrant such a change. No further proposed changes are pending in the public housing program. Mr. Jeffrey stated that these anticipated changes and requirements will be considered in preparing the LCHA Administrative plan and the LCHA 5 year plan.

Mr. Jeffrey next addressed the issue of a recent article, which indicates people in Lake County Housing Authority jurisdiction, and the other 2 Lake County Authorities appear to be in better condition than other Illinois Housing Authorities. There are at least 6 Illinois Housing Authorities out of approximately 105 Authorities who are actually terminating participants from their Section 8 programs due to financial restraints. The largest, McLean County is terminating approximately 60 participants out of 500 on the program – over 10% cut by May 1<sup>st</sup>. LCHA potentially faces this issue and it must be determined if LCHA must make cuts, what procedure to implement to eliminate participants? A procedure must be in place and included in the Admin Plan if such action should be warranted.

Mr. Jeffrey turned the meeting over to David Northern who addressed the issue of major policy changes which are to be included in the Admin Plan. Mr. Northern provided members with information concerning timelines for submitting plans for this year, which include today's RAB meeting; date to submit notice of public hearing, which is June 3<sup>rd</sup>. A certificate from Lake County affirming LCHA plan conforms to county's principles is needed; the Housing Authority Board resolution on June 16<sup>th</sup>, and submission of the Admin Plan by July 16<sup>th</sup>. Any further major policy changes and/or any anticipated proposed changes and any additional information will be forwarded to RAB members.

Mr. Northern addressed the issue of the minimum rent increase; which LCHA is proposing to raise from zero to \$50.00 per month. Mr. Jeffrey detailed the primary effect would be in Section 8 program and would affect approximately 200 households. There are approximately 75 participants who currently pay no rent at all - those participants claim no income. John Donald questioned how it is possible for an individual to exist with no income. Discussion followed with Mr. Jeffrey interjecting that possibly part of the reasoning for imposing a minimum rent is the zero income factor.

In regard to LCHA financial issues, Mr. Jeffrey detailed LCHA expends approximately \$17 million per year in rental assistance in the Section 8 program. A minimum rent would save LCHA approximately \$105,000, enough to support approximately 15 families per year.

Mr. Northern opened the meeting for discussion regarding the minimum rent issue. Maere Floyd-Pitts inquired as to whether the minimum rent amount can be less than \$50 per month. John Donald was not opposed, reasoning that \$50.00 month is only a little over \$1.00 per day.

Ms. Hoffmeier questioned if the minimum rent could it be less if circumstances warrant? Mr. Northern advised that LCHA policy will provide for a hardship exemption for participants.

Ms. Floyd Pitts inquired if the change in minimum rent would blanket cover everyone at zero rent? Mr. Jeffrey explained that all participants would be included,

unless a hardship exemption is requested. The hearing process would also be available to participants.

Karen Blatcher and Dorothy Hoffmeier both expressed support for the proposed \$50 minimum rent.

Ms. Floyd-Pitts expressed continued doubts regarding the minimum rent increase.

Ms. Blatcher confirmed her support of the increase

Mr. Northern stated that LCHA staff has expressed being in favor of the minimum rent.

Ms. Floyd-Pitts asked if adequate notice would be provided to tenants.

Mr. Northern explained that all participants would be adequately informed with the notice of their right to a hearing.

Mr. Northern next addressed the issue of the creation of panel to review reasonable accommodation requests to include individuals with expertise as it relates to persons with disabilities. Mr. Northern further reported the necessity to create a new reasonable accommodation policy and procedure to have basic outlines to deal with requests.

Mr. Jeffrey explained the biggest issue has to do with the size of unit participants rent from Public Housing or authorized to rent in the open market. When receiving reasonable accommodation requests for 2 bedroom units (particularly couples) LCHA has required a verification from an outside source, such as a Physician. In many cases, LCHA is uncertain of the validity of the request, and because LCHA must become more financially responsible, we must address the issue. LCHA needs to create a policy that is appropriate and will award the accommodations when truly needed, but with a mechanism that will evaluate the requests more closely than in the past.

Ms. Blatcher questioned whether a participant currently occupying a 2 bedroom unit be forced to move.

Mr. Jeffrey interjected that in the Voucher program there are 2 issues regarding unit size: #1 – what bedroom size is authorized on voucher; #2 – what is real size of unit? It is possible for a single person issued a 1-bedroom voucher to personally pay the additional amount difference for a 2-bedroom unit – the program in this case is not supporting a 2-bedroom unit. The concern by LCHA is determining that the 2-bedroom voucher is appropriately issued.

Mr. Northern added that the reason for the panel is to utilize the expertise of more experienced and knowledgeable persons to make recommendations. In researching the issue, Mr. Northern has found several reasonable accommodation polices from other

agencies which all agree on approving a reasonable accommodation if it will impact the family's living situation.

Ms. Blatcher questioned the impact on a request for the needs of such items as handles, grab bars, and how these would be affected.

Mr. Northern advised that not all requests will be referred to the committee, LCHA staff will review obvious needs, but it is necessary to have policies in place for consideration of requests LCHA staff is not experienced to resolve.

Ms. Floyd – Pitts inquired as to the structure of panel members?

Mr. Jeffrey reported that research being conducted to locate members of both consumers and practitioners in specific areas of working with people with disabilities.

Mr. Northern summarized the Housing Authority intent to create a more structured policy and procedures and to create a panel to review reasonable accommodation requests.

Mr. Northern next addressed the members concerning the policy and procedures, which would be enacted if future conditions should warrant the necessity to decrease the number of participants in the Section 8 program.

Mr. Jeffrey outlined the following suggestions by staff for reducing the number of participants, adding that LCHA has not selected any specific policy at this time. #1 – random choice of all participants; #2 – someone who is not disabled or elderly who has been on the program the longest; #3 – participant currently on the program and has signed payback agreement, but are not current with agreement payments; #4 – any participant who owes LCHA money, whether they are current or not with agreement payments. Mr. Northern added that an additional consideration is those participants who have just coming on program not elderly or disabled.

Ms. Hoffmeier suggested eliminating those participants that neglect apartments and/or have housekeeping issues.

Ms. Blatcher inquired if committee members were being asked to choose one of the procedures or that procedures need to be developed.

Mr. Jeffrey explained that LCHA is seeking any suggestions, reactions, or alternatives from the Board Member's prospective as residents and participants.

Ms. Blatcher believes those participants in violation should be eliminated, even if violation cannot be proved legally, perhaps by surprise inspections? She has observed unauthorized persons living in a participant's unit for as long as six months at a time.

Mr. Jeffrey and Mr. Northern explained the process for attempting to prove this type of violation legally and urged the continued reporting of participants who may be in violation and assured the members that LCHA staff members investigate all reports.

Ms. Blatcher stated those participants in violation should be cut from the program– those abiding by rules should not be punished.

Mr. Northern advised the decision to eliminate participants is very difficult; however the waiting list is extensive for people seeking assistance. Also, unreported income by participants equals millions of dollars owed to LCHA. Mr. Northern explained the process for removing a participant from program can be extensive including hearings, and ultimately, the LCHA Board of Commissioners has the final decision.

Mr. Jeffrey believes in summary that the Resident Advisory Board preference would be eliminating those participants not complying, least favorite is random choice..

Further discussion continued with Mr. Jeffrey explaining that if participants are not seniors or disabled, an individual who has been on program for 15 years and “has not bettered themselves” – it is time for someone else to have a chance.

Mr. Northern stated a possible policy in reverse – the latest participants, on the shortest time and have been affected the least should be eliminated and emphasized all ideas are proposed only and not finalized.

Mr. Jeffrey continued to explain that many people work themselves off the program. These individuals take advantage of programs such as FSS, get an education, plan for self-improvement, get a job or better job, and literally work themselves off the program. FSS provides a 5-year window to meet goals established at the time the participant entered program. Further information presented by Mr. Jeffrey S8 participants who are not current on a repayment agreement are currently not terminated to avoid placing a hardship on the landlord. There are however, people who are current on paybacks, but again noted these participants are on a payback agreement because they failed to follow the rules.

Mr. Northern next advised the Resident Advisory Board of a policy change added to Low Rent program adding families designated as “*Near Elderly*”: - *defined as a family whose sole member is at least 55 years of age, but below the age of 62; 2 or more persons who are at least 55 years of age, but below the age of 62, or one or more persons who are at least 55 years of age, but below the age of 62, living with one or more live in aids.* This policy change was instituted to help with deficiencies as it relates to the vacancies in our senior developments, due to the age 62 requirement. This change will help to eliminate a large portion of vacancies related to LCHA senior buildings.

Mr. Jeffrey advised because of an *over-building* of senior properties throughout the tax credit program – all of which have many vacancies. This has caused an over-supply of affordable senior housing in many communities throughout the United States.

Mr. Northern explained the HUD guidelines for bedroom sizes, LCHA is clarifying its' policy to abide by HUD minimum requirements.

Mr. Jeffrey elaborated on an example of participant who requested a larger unit to allow family members to reside in her unit. Mr. Jeffrey stated research showed participant's family is a distinct separate family and therefore cannot move in the same unit. Situations such as this are not currently outline in policy, and need to be added.

Mr. Northern explained the need to strengthen the policy to avoid possible abuse by participants thereby being able to assist additional applicants. Discussion followed by the members concerning consideration of possible instances of participant illness or other circumstances.

Mr. Jeffrey advised that there may be circumstances where increasing voucher size could be warranted.

Mr. Northern explained that in the policy design process, the terminology *must* and *may* are used, in order to enable the Housing Authority to be able to make decisions more efficiently. Policies must be designed to make certain programs are administered efficiently.

Discussion followed by members.

Mr. Northern next directed the attention of the Resident Advisory Board members to proposed physical improvements outlined in the PHA plan table library. LCHA is awarded an estimated \$1.1 million in Capital Fund program; these monies used to improve public housing and some monies allotted for operations to help Low Rent program if needed.

Part two – detail of property improvements: - #1 – gutters, fascia and downspouts at Marion Jones, estimated \$75,000; #2 – Marion Jones town homes – exterior lighting by individual unit doors to be energy efficient dusk to dawn lights which cannot be controlled by tenant; #3 – Marion Jones town homes – security camera & lighting – outside lighting not associated with units and security camera at community center, inside building & parking lot area. A large amount of vandalism has occurred to the building and concrete sidewalks. The sidewalks will be replaced, the cost split with the contractor.

Mr. Floyd-Pitts advised that the brick retaining wall at the Marion Jones town home property is falling apart.

Mr. Northern advised that part of the overall plan is repairing sidewalks, curbs, streets that are all breaking up.

Mr. Jeffrey related LCHA is hopeful new North Chicago Mayor will be responsive to working with the Housing Authority on improvements at Marion Jones town homes.

Ms. Floyd-Pitts voiced concern about lighting in back of units, stating it is very dark with a lot of traffic through those areas.

Mr. Northern also advised of the renovation of common areas at Beach Haven Tower, to include structural work, doors, walks and walls.

Members questioned the water softener item as outline in the table. Mr. Jeffrey explained that several public housing scattered site homes receive their water from private wells with poor water quality. Mr. Northern explained that the water softeners would be installed and maintained by LCHA. Mr. Northern further stated that because of the poor water quality many of these scattered site unit's bathrooms need replacing.

Ms. Floyd-Pitts informed the members the new "batch" bathroom remodeling quality is better than previous work, and questioned if the 1 bedroom units ever be done? Mr. Northern explained that LCHA plans to replace all bathrooms; however, the time frame is unknown as funding is an issue and work will be done in phases.

Mr. Donald asked about the item of the bridge at Kuester Manor. Mr. Northern advised that LCHA must maintain land on the opposite side of the creek and explained the difficulty of getting equipment across the creek. Also, Kuester Manor tenants plant on this land; the bridge will assist LCHA maintenance and residents.

Mr. Northern next advised members the PHA "Y" relates to items that are budgeted and can be used at any site or main office and is a flexibility in using funds.

Mr. Northern explained definitions of where money is expended by category.

1. Complete rehab involves vacant unit turn around reduction – use capital fund dollars to renovate units
2. Operation dollars - Used to cover program deficiencies
3. Management improvements – items to improve property management, security, investigations
4. Resident initiatives – resident programs and activities
5. In regard to the computer upgrade, HUD has instructed LCHA to replace computer software, also used for various computer upgrades and repairs.
6. Salary allocations – administrative salaries and benefits.

Mr. Northern further explained that funding in the Capital Fund has 2 years to obligate monies, 4 years to expend the funds.

7. A & E – Architect & Engineering – persons help design developments & technical services person who deals with capital fund program

8. Contingency – miscellaneous needs or any need under budgeted.

Part 3 – Implementation schedule as yet is not completed.

*Ms. Hoffmeier asked about a security camera for Shiloh parking lot. Mr. Northern explained that the need for a camera for Shiloh parking lot as per tenant meeting has been noted, as well upgrades to other senior buildings and properties.*

*Mr. Northern directed attention to the final handout; a breakdown of waiting list numbers as they apply to both programs and the characteristics of applicants.*

Mr. Northern thanked the members for their participation and asked the members to advise LCHA of any other suggestions or concerns they may have in the future.

The meeting adjourned at 4PM.

**ATTACHMENT IL056 i05**  
**Component 7**  
**Capital Fund Program Annual Statement**  
**Parts I, II, and II**

**Annual Statement**  
**Capital Fund Program (CFP) Part I: Summary**

Capital Fund Grant Number **IL06P056-501-05 FFY** of Grant Approval: **(10/2005)**

Original Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	\$100,000
3	1408 Management Improvements	\$237,628
4	1410 Administration	\$118,814
5	1411 Audit	
6	1415 Liquidated Damages	
7	1430 Fees and Costs	\$120,000
8	1440 Site Acquisition	
9	1450 Site Improvement	\$70,000
10	1460 Dwelling Structures	\$475,000
11	1465.1 Dwelling Equipment-Nonexpendable	
12	1470 Nondwelling Structures	\$35,000
13	1475 Nondwelling Equipment	
14	1485 Demolition	
15	1490 Replacement Reserve	
16	1492 Moving to Work Demonstration	
17	1495.1 Relocation Costs	
18	1498 Mod Used for Development	
19	1502 Contingency	\$31,700
20	<b>Amount of Annual Grant (Sum of lines 2-19)</b>	<b>\$1,188,142</b>
21	Amount of line 20 Related to LBP Activities	
22	Amount of line 20 Related to Section 504 Compliance	
23	Amount of line 20 Related to Security	
24	Amount of line 20 Related to Energy Conservation Measures	

**Annual Statement**  
**Capital Fund Program (CFP) Part II: Supporting Table**

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
IL06P056-001 Marion Jones	Gutters, Fascia and Downspouts	1460	\$70,000
IL06P056-001 Marion Jones	Unit Exterior Lighting	1460	\$75,000

IL06P056-001 Marion Jones	Security Camera Systems and Lighting	1450	\$50,000
IL06P056004 Beach Haven	Renovate Common Areas	1460	\$100,000
IL06P056-008 John Kuester Manor	Build Bridge Over Creek	1450	\$20,000
PHA WIDE	Painting and wall Repair Main Office	1470	\$35,000
PHA WIDE	Water Softens	1460	\$30,000
PHA WIDE	Complete Rehab/Vacant Unit Turnaround Reduction	1460	\$200,000
Operations	Operations	1406	\$100,000
Management Improvements	Resident Safety & Security	1408	\$160,000
	Resident Initiatives	1408	\$10,000
	Computer Upgrade	1408	\$20,000
	Software Replacement	1408	\$42,628
	Salary Study	1408	\$5,000
Administration	Salary Allocation	1410	\$48,814
	EBC	1410	\$70,000
Fees and Cost	A&E	1430	\$60,000
	Inspections	1430	\$60,000
Contingency	Any	1502	\$31,700

**Annual Statement**

**Capital Fund Program (CFP) Part III: Implementation Schedule**

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)	All Funds Expended (Quarter Ending Date)

IL06P056-001 Marion Jones	10/01/2007 is Obligated date for all activities	10/01/2008 is Expended date for all activities
IL06P056-001 Marion Jones		
IL06P056-001 Marion Jones		
IL06P056004 Beach Haven		
IL06P056-008 John Kuester Manor		
PHA WIDE		
PHA WIDE		
PHA WIDE		
Operations		
Management Improvements		
Administration		
Fees and Cost Contingency		

**Annual Statement/Performance  
and Evaluation Report**

**Part I: Summary**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

OMB approval No. 2577-0157 (Exp. 7/31/98)

HA Name <b>Lake County Housing Authority</b>				Comp Grant Number <b>IL06P056-501-01</b>	FFY of Grant Approval <b>2001</b>
___ Original Annual Statement		___ Reserve for Disasters/Emergencies		___ Revised Annual Statement/Revision Number ___	
___ Final Performance & Evaluation Report		___ Performance & Evaluation Report for Program Year Ending 03/31/05			
Line #	Summary by Development Accounts	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations (May not exceed 20% of line 19)	\$ 167,000.00	\$ 167,000.00	\$ 167,000.00	\$ 167,000.00
3	1408 Management Improvements	\$ 130,000.00	\$ 105,451.18	\$ 105,451.18	\$ 105,451.18
4	1410 Administration	\$ 133,950.00	\$ 133,950.00	\$ 133,950.00	\$ 133,950.00
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees & Cost	\$ 132,167.00	\$ 73,247.92	\$ 73,247.92	\$ 73,247.92
8	1440 Site Acquisition				
9	1450 Site Improvement	\$ 119,606.00	\$ 57,748.00	\$ 57,748.00	\$ 57,748.00
10	1460 Dwelling Structures	\$ 449,643.56	\$ 633,627.40	\$ 633,627.40	\$ 633,627.40
11	1465.1 Dwelling Equipment-Nonexpendable				
12	1470 Nondwelling Structures	\$ 115,174.50	\$ 76,534.54	\$ 76,534.54	\$ 76,534.54
13	1475 Nondwelling Equipment	\$ 122,430.96	\$ 122,430.96	\$ 122,430.96	\$ 122,430.96
14	1485 Demolition				
15	1490 Replacement Reserves				
16	1495.1 Relocation Costs				
17	1498 Mod Used for Development				
18	1502 Contingency (may not exceed 8% of line 19)	\$ 17.98	\$ -	\$ -	\$ -
19	<b>Amount of Annual Grant (Sum of lines 2-18)</b>	\$ 1,369,990.00	\$ 1,369,990.00	\$ 1,369,990.00	\$ 1,369,990.00
20	Amount of Line 19 related to LBP Activities				
21	Amount of Line 19 related to Section 504 Compliance				
22	Amount of Line 19 related to Security				
23	Amount of Line 19 related to Energy Conservation Measures				
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report					
Signature of Executive Director and Date <b>X</b>				Signature of Public Housing Director/Office of Native American Programs Administrator and Date <b>X</b>	

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 501-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA Wide Activities								
<b>HA-Wide</b>	<b>Management Improvement</b>							
	Resident Safety & Security	1408		\$ 100,000.00	\$ 75,451.18	\$ 75,451.18	\$ 75,451.18	
	Information Technolgy Upgrade	1408		\$ 30,000.00	\$ 30,000.00	\$ 30,000.00	\$ 30,000.00	
	<b>Subtotal</b>			<b>\$ 130,000.00</b>	<b>\$ 105,451.18</b>	<b>\$ 105,451.18</b>	<b>\$ 105,451.18</b>	
<b>HA-Wide</b>	<b>Administration</b>							
	Salary	1410		\$ 90,000.00	\$ 59,596.17	\$ 59,596.17	\$ 59,596.17	
	EBC	1410		\$ 36,950.00	\$ 72,575.19	\$ 72,575.19	\$ 72,575.19	
	Travel	1410		\$ 2,000.00	\$ 764.24	\$ 764.24	\$ 764.24	
	Sundry	1410		\$ 5,000.00	\$ 1,014.40	\$ 1,014.40	\$ 1,014.40	
	<b>Subtotal</b>			<b>\$ 133,950.00</b>	<b>\$ 133,950.00</b>	<b>\$ 133,950.00</b>	<b>\$ 133,950.00</b>	
<b>HA-Wide</b>	<b>Fees and Costs</b>							
	Consultant	1430		\$ 25,000.00	\$ 1,489.40	\$ 1,489.40	\$ 1,489.40	
	A and E	1430		\$ 40,000.00	\$ 6,944.00	\$ 6,944.00	\$ 6,944.00	
	Inspections	1430		\$ 62,167.00	\$ 64,564.52	\$ 64,564.52	\$ 64,564.52	
	Sundry	1430		\$ 5,000.00	\$ 250.00	\$ 250.00	\$ 250.00	
	<b>Subtotal</b>			<b>\$ 132,167.00</b>	<b>\$ 73,247.92</b>	<b>\$ 73,247.92</b>	<b>\$ 73,247.92</b>	
<b>HA-Wide</b>	<b>Equipment</b>							
	Veheical (1)	1475		\$ 52,201.02	\$ 52,201.02	\$ 52,201.02	\$ 52,201.02	
	Computer Hardware	1475		\$ 70,229.94	\$ 70,229.94	\$ 70,229.94	\$ 70,229.94	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal</b>			<b>\$ 122,430.96</b>	<b>\$ 122,430.96</b>	<b>\$ 122,430.96</b>	<b>\$ 122,430.96</b>	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement	(2) To be completed for the Performance & Evaluation Report
Signature of Executive Director and Date	Signature of Public Housing Director/Office of Native American Program Administrator and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 501-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-1</b>								
<b>Marion Jones</b>	Concrete Replacement	1450		\$ 1,800.00	\$ 1,800.00	\$ 1,800.00	\$ 1,800.00	
	Tree Trimming	1450		\$ -	\$ 2,050.00	\$ 2,050.00	\$ 2,050.00	
		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
	Replace entrance Canopies (125)	1460	125	\$ 49,459.95	\$ 18,791.22	\$ 18,791.22	\$ 18,791.22	
	Cleaning Unit Heat Ducts	1460	125	\$ 18,750.00	\$ 82,817.20	\$ 82,817.20	\$ 82,817.20	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
	Renovate Community Building	1470		\$ 32,174.50	\$ 41,301.54	\$ 41,301.54	\$ 41,301.54	
	Dumpstor Surround	1470			\$ 5,743.00	\$ 5,743.00	\$ 5,743.00	
	<b>Subtotal 1450</b>			<b>\$ 1,800.00</b>	<b>\$ 3,850.00</b>	<b>\$ 3,850.00</b>	<b>\$ 3,850.00</b>	
	<b>Subtotal 1460</b>			<b>\$ 68,209.95</b>	<b>\$ 101,608.42</b>	<b>\$ 101,608.42</b>	<b>\$ 101,608.42</b>	
	<b>Subtotal 1470</b>			<b>\$ 32,174.50</b>	<b>\$ 47,044.54</b>	<b>\$ 47,044.54</b>	<b>\$ 47,044.54</b>	
<b>IL056-2</b>								
	Tree Trimming	1450		\$ -	\$ 500.00	\$ 500.00	\$ 500.00	
		1450		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			<b>\$ -</b>	<b>\$ 500.00</b>	<b>\$ 500.00</b>	<b>\$ 500.00</b>	
	<b>Subtotal 1460</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>IL056-4</b>								
	Tree Trimming	1450		\$ -	\$ 950.00	\$ 950.00	\$ 950.00	
	Interior Wall Replacement	1460		\$ 17,910.00	\$ 25,455.00	\$ 25,455.00	\$ 25,455.00	
	Replace Shower Heads	1460	98	\$ 15,875.00	\$ 11,800.00	\$ 11,800.00	\$ 11,800.00	
	Install Emergency Unit Alarms	1460	98	\$ 73,500.00	\$ -	\$ -	\$ -	
	Exhaust duct Cleaning	1460		\$ 5,900.00	\$ 6,794.00	\$ 6,794.00	\$ 6,794.00	
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement				(2) To be completed for the Performance & Evaluation Report				
Signature of Executive Director and Date				Signature of Public Housing Director/Office of Native American Program Administrator and Date				

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

Performance & Evaluation Report for 501-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-4 Beach Haven</b>		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ 950.00	\$ 950.00	\$ 950.00	
	<b>Subtotal 1460</b>			\$ 113,185.00	\$ 44,049.00	\$ 44,049.00	\$ 44,049.00	
<b>IL 056-7 Scattered Site</b>	Tree Treaming	1450		\$ 4,000.00	\$ 3,410.00	\$ 3,410.00	\$ 3,410.00	
	Concrete Replacement	1450		\$ 15,550.00	\$ 15,550.00	\$ 15,550.00	\$ 15,550.00	
	Replace Roofing	1460	4	\$ 24,000.00	\$ 17,899.75	\$ 17,899.75	\$ 17,899.75	
	Install New Furnaces	1460	3	\$ 9,000.00	\$ 8,810.00	\$ 8,810.00	\$ 8,810.00	
	Complete Rehabilitations	1460	2	\$ 40,000.00	\$ 85,743.00	\$ 85,743.00	\$ 85,743.00	
	Install Electric Smoke Detectors	1460		\$ 3,138.75	\$ 3,138.75	\$ 3,138.75	\$ 3,138.75	
	Siding Replacement	1460		\$ -	\$ 23,060.00	\$ 23,060.00	\$ 23,060.00	
	<b>Subtotal 1450</b>			\$ 19,550.00	\$ 18,960.00	\$ 18,960.00	\$ 18,960.00	
	<b>Subtotal 1460</b>			\$ 76,138.75	\$ 138,651.50	\$ 138,651.50	\$ 138,651.50	
<b>IL056-8 Scattered site PHA Office</b>	Tree Treaming	1450		\$ 4,000.00	\$ 10,235.00	\$ 10,235.00	\$ 10,235.00	
	Office Access Road	1450		\$ 62,000.00	\$ -	\$ -	\$ -	
	Concrete Replacement	1450		\$ 2,256.00	\$ 9,116.00	\$ 9,116.00	\$ 9,116.00	
	Replace Roofing	1460	2	\$ 12,000.00	\$ 15,118.50	\$ 15,118.50	\$ 15,118.50	
	Complete Rehabilitation	1460	2	\$ 40,133.61	\$ 88,213.61	\$ 88,213.61	\$ 88,213.61	
	Install electric smoke Detectors	1460		\$ 1,046.25	\$ 1,046.25	\$ 1,046.25	\$ 1,046.25	
	Siding Replacement	1460		\$ -	\$ 16,430.00	\$ 16,430.00	\$ 16,430.00	
		1460		\$ -	\$ -	\$ -	\$ -	
	Office Roof	1470		\$ 83,000.00	\$ 29,490.00	\$ 29,490.00	\$ 29,490.00	
	<b>Subtotal 1450</b>			\$ 68,256.00	\$ 19,351.00	\$ 19,351.00	\$ 19,351.00	
	<b>Subtotal 1460</b>			\$ 53,179.86	\$ 120,808.36	\$ 120,808.36	\$ 120,808.36	
	<b>Subtotal 1470</b>			\$ 83,000.00	\$ 29,490.00	\$ 29,490.00	\$ 29,490.00	

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**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

Performance & Evaluation Report for 501-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-12</b> <b>Scattered Site</b>	Tree Trimming	1450		\$ -	\$ 4,360.00	\$ 4,360.00	\$ 4,360.00	
		1450		\$ -	\$ -			
	Replace Furnaces	1460	3	\$ 9,000.00	\$ 7,157.00	\$ 7,157.00	\$ 7,157.00	
	Siding Replacement	1460		\$ -	\$ 12,822.00	\$ 12,822.00	\$ 12,822.00	
	Roof Replacement	1460		\$ -	\$ 7,843.00	\$ 7,843.00	\$ 7,843.00	
	<b>Subtotal 1450</b>			\$ -	\$ 4,360.00	\$ 4,360.00	\$ 4,360.00	
	<b>Subtotal 1460</b>			\$ 9,000.00	\$ 27,822.00	\$ 27,822.00	\$ 27,822.00	
<b>IL056-13</b> <b>Warren Manor</b>	Landscape Improvements	1450		\$ 10,000.00	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
	Repair Leak in Sprinkler System	1460		\$ -	\$ 31,373.87	\$ 31,373.87	\$ 31,373.87	
		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ 10,000.00	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ 31,373.87	\$ 31,373.87	\$ 31,373.87	
<b>IL056-14</b> <b>Scattered Site</b>	Tree Trimming	1450		\$ -	\$ 1,537.00	\$ 1,537.00	\$ 1,537.00	
	Complete Rehab	1460		\$ 49,760.00	\$ 49,760.00	\$ 49,760.00	\$ 49,760.00	
	Replace Roofing	1460		\$ 1,960.00	\$ 12,578.00	\$ 12,578.00	\$ 12,578.00	
	Siding Replacement	1460		\$ -	\$ 16,697.00	\$ 16,697.00	\$ 16,697.00	
	Replace Furnaces	1460		\$ -	\$ 1,364.00	\$ 1,364.00	\$ 1,364.00	
	<b>Subtotal 1450</b>			\$ -	\$ 1,537.00	\$ 1,537.00	\$ 1,537.00	
	<b>Subtotal 1460</b>			\$ 51,720.00	\$ 80,399.00	\$ 80,399.00	\$ 80,399.00	
<b>IL056-15</b> <b>Scattered Site</b>	Tree Treaming	1450		\$ 10,000.00	\$ 2,925.00	\$ 2,925.00	\$ 2,925.00	
		1450		\$ -	\$ -	\$ -	\$ -	
	Complete Rehabilitation	1460	1	\$ 20,000.00	\$ 13,320.00	\$ 13,320.00	\$ 13,320.00	
	Interior Renovation	1460	1	\$ 20,210.00	\$ 20,210.00	\$ 20,210.00	\$ 20,210.00	
	Replace Roofing	1460		\$ -	\$ 13,234.25	\$ 13,234.25	\$ 13,234.25	
	Siding Replacement	1460		\$ -	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	

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**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 501-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-15</b>		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			<b>\$ 10,000.00</b>	<b>\$ 2,925.00</b>	<b>\$ 2,925.00</b>	<b>\$ 2,925.00</b>	
	<b>Subtotal 1460</b>			<b>\$ 40,210.00</b>	<b>\$ 51,764.25</b>	<b>\$ 51,764.25</b>	<b>\$ 51,764.25</b>	
<b>IL056-16</b> <b>Scattered Site</b>		1450		\$ -	\$ -	\$ -	\$ -	0
	Replace Roofing	1460	2	\$ 12,000.00	\$ -	\$ -	\$ -	0
	Complete Rehabilitation	1460	1	\$ 20,000.00	\$ 13,285.00	\$ 13,285.00	\$ 13,285.00	
	Replace Furnaces	1460	2	\$ 6,000.00	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Subtotal 1460</b>			<b>\$ 38,000.00</b>	<b>\$ 13,285.00</b>	<b>\$ 13,285.00</b>	<b>\$ 13,285.00</b>	
<b>IL056-17</b>	Tree Treaming	1450			\$ 575.00	\$ 575.00	\$ 575.00	
<b>IL056-18</b>	Replace Furnace	1460		\$ -	\$ 1,400.00	\$ 1,400.00	\$ 1,400.00	
	<b>Subtotal 1450</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Subtotal 1460</b>			<b>\$ -</b>	<b>\$ 1,400.00</b>	<b>\$ 1,400.00</b>	<b>\$ 1,400.00</b>	
<b>IL056-19</b>	Tree Trimming	1450			\$ 950.00	\$ 950.00	\$ 950.00	
	Roof Replacement	1460		\$ -	\$ 7,346.00	\$ 7,346.00	\$ 7,346.00	3786
	Siding Replacement	1460			\$ 15,120.00	\$ 15,120.00	\$ 15,120.00	
	<b>Subtotal 1450</b>			<b>\$ -</b>	<b>\$ 950.00</b>	<b>\$ 950.00</b>	<b>\$ 950.00</b>	
	<b>Subtotal 1460</b>			<b>\$ -</b>	<b>\$ 22,466.00</b>	<b>\$ 22,466.00</b>	<b>\$ 22,466.00</b>	

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

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

Performance & Evaluation Report for 501-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-20</b>	Tree Trimming	1450			\$ 2,090.00	\$ 2,090.00	\$ 2,090.00	
		1460		\$ -	\$ -	\$ -	\$ -	
			<b>Subtotal 1450</b>		\$ -	\$ 2,090.00	\$ 2,090.00	\$ 2,090.00
			<b>Subtotal 1460</b>		\$ -	\$ -	\$ -	\$ -
<b>IL056-21</b>	Tree Treeming	1450			\$ 1,700.00	\$ 1,700.00	\$ 1,700.00	
<b>IL056-22</b>	Landscape Improvement	1450		\$ 10,000.00	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
			<b>Subtotal 1450</b>		\$ 10,000.00	\$ -	\$ -	\$ -
			<b>Subtotal 1460</b>		\$ -	\$ -	\$ -	\$ -
		<b>Total 1460</b>		\$ 449,643.56	\$ 633,627.40	\$ 633,627.40	\$ 633,627.40	
		<b>Total 1470</b>		\$ 115,174.50	\$ 76,534.54	\$ 76,534.54	\$ 76,534.54	
		<b>Total 1450</b>		\$ 119,606.00	\$ 57,748.00	\$ 57,748.00	\$ 57,748.00	
<b>HA-Wide</b>	A. Contingency	1502		\$ 17.98	\$ -	\$ -	\$ -	
	<b>Subtotal</b>			\$ 17.98	\$ -	\$ -	\$ -	
<b>HA-Wide</b>	Operations	1406		\$ 167,000.00	\$ 167,000.00	\$ 167,000.00	\$ 167,000.00	
	<b>Subtotal</b>			\$ 167,000.00	\$ 167,000.00	\$ 167,000.00	\$ 167,000.00	
	<b>Grand Total</b>			\$ 1,369,990.00	\$ 1,369,990.00	\$ 1,369,990.00	\$ 1,369,990.00	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement

(2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date

Signature of Public Housing Director/Office of Native American Program Administrator and Date

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

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

Performance & Evaluation Report for 501-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
HA Wide Activities							
<b>IL 056-001 Marion Jones</b>	9/30/2003		9/30/2003	9/30/2005		3/31/2005	
<b>IL 056-002 Shiloh Towers</b>							
<b>IL056-004 Beach Haven T.</b>	9/30/2003		9/30/2003	9/30/2005		3/31/2005	
<b>IL056-007 Scattered Site</b>	9/30/2003		9/30/2003	9/30/2005		3/31/2005	
<b>IL056-008 Hawlwyl, millview</b>	9/30/2003		9/30/2003	9/30/2005		3/31/2005	
<b>Kuester &amp; Scattered Site</b>							
<b>IL056-011 Hawley Orchard</b>							
<b>IL056-012 Scattered Site</b>	9/30/2003		9/30/2003	9/30/2005		3/31/2005	
<b>IL056-013 Warren Manor</b>	9/30/2003		9/30/2003	9/30/2005		3/31/2005	
<b>IL056-014 Scattered Site</b>	9/30/2003		9/30/2003	9/30/2005		3/31/2005	
<b>IL056-015 Scattered Site</b>	9/30/2003		9/30/2003	9/30/2005		3/31/2005	
<b>IL056-016 Scattered Site</b>	9/30/2003		9/30/2003	9/30/2005		3/31/2005	
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement				(2) To be completed for the Performance & Evaluation Report			
Signature of the Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date			

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

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

Performance & Evaluation Report for 501-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
HA Wide Activities							
<b>IL 056-017 Scattered Site</b>							
<b>IL 056-018 Scattered Site</b>							
<b>IL056-019 Scattered Site</b>							
<b>IL056-020 Scattered Site</b>							
<b>IL056-021 Scattered Site</b>							
<b>IL056-022 Disabled</b>	9/30/2003		9/30/2003	9/30/2005		3/31/2005	
<b>HA-Wide</b>	9/30/2003		9/30/2003	9/30/2005		3/31/2005	
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**Annual Statement/Performance  
and Evaluation Report  
Part II: Supporting Pages  
Capital Fund Program (CFP)**

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

Performance & Evaluation Report for Program 501-02 Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>HA Wide Activities</b>								
<b>HA-Wide</b>	<b>Management Improvement</b>							
	Resident Safety & Security	1408		\$ 100,000.00	\$ 50,000.00	\$ 50,000.00	\$ 33,952.78	
	Information Technolgy Upgrade	1408		\$ 55,000.00	\$ 55,000.00	\$ 55,000.00	\$ 55,000.00	
	Energy Audit	1408		\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	
	<b>Subtotal</b>			<b>\$ 175,000.00</b>	<b>\$ 125,000.00</b>	<b>\$ 125,000.00</b>	<b>\$ 108,952.78</b>	
<b>HA-Wide</b>	<b>Administration</b>							
	Salary	1410		\$ 62,000.00	\$ 48,440.53	\$ 48,440.53	\$ 48,440.53	
	EBC	1410		\$ 32,085.00	\$ 50,679.50	\$ 50,679.50	\$ 50,679.50	
	Travel	1410		\$ 2,000.00	\$ 1,245.51	\$ 1,245.51	\$ 1,245.51	
	Sundry	1410		\$ 5,000.00	\$ 719.46	\$ 719.46	\$ 719.46	
	<b>Subtotal</b>			<b>\$ 101,085.00</b>	<b>\$ 101,085.00</b>	<b>\$ 101,085.00</b>	<b>\$ 101,085.00</b>	
<b>HA-Wide</b>	<b>Fees and Costs</b>							
	Consultant	1430		\$ -	\$ -	\$ -	\$ -	
	A and E	1430		\$ 6,865.80	\$ 13,103.80	\$ 13,103.80	\$ 13,103.80	
	Inspections	1430		\$ 62,167.00	\$ 62,650.00	\$ 62,650.00	\$ 39,983.40	
	Sundry	1430		\$ 2,423.22	\$ 910.00	\$ 910.00	\$ 910.00	
	<b>Subtotal</b>			<b>\$ 71,456.02</b>	<b>\$ 76,663.80</b>	<b>\$ 76,663.80</b>	<b>\$ 53,997.20</b>	
<b>HA-Wide</b>	<b>Equipment</b>							
	Copy Machine	1475		\$ 6,170.00	\$ 6,170.00	\$ 6,170.00	\$ 6,170.00	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal</b>			<b>\$ 6,170.00</b>	<b>\$ 6,170.00</b>	<b>\$ 6,170.00</b>	<b>\$ 6,170.00</b>	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date

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

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

Performance & Evaluation Report for Program 501-02 Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity			Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-1</b>								
<b>Marion Jones</b>	Landscaping	1450		\$ 14,867.70	\$ 32,472.00	\$ 32,472.00	\$ 32,472.00	
		1450		\$ -	\$ -	\$ -	\$ -	
	Clean Ducts	1460	125	\$ 14,672.20	\$ 14,672.80	\$ 14,672.80	\$ 14,672.80	
	Bathroom Replacement	1460		\$ 219,000.00	\$ 203,400.00	\$ 203,400.00	\$ 203,400.00	
	Rehab Units	1460		\$ 8,717.00	\$ 8,717.00	\$ 8,717.00	\$ 8,717.00	
	Asbestos Removal	1460		\$ 2,150.00	\$ 2,150.00	\$ 2,150.00	\$ 2,150.00	
	Dumpstor Surrounding	1460			\$ 1,420.00	\$ 1,420.00	\$ 1,420.00	
	Replace Entrance Canopies	1460		\$ 8,760.08	\$ 11,672.02	\$ 11,672.02	\$ 11,672.02	
	Renovate Community Building	1470		\$ -	\$ -	\$ -	\$ -	
	Replace Community Bldg. Furniture	1475		\$ 8,842.00	\$ 8,299.17	\$ 8,299.17	\$ 8,299.17	
	<b>Subtotal 1450</b>			<b>\$ 14,867.70</b>	<b>\$ 32,472.00</b>	<b>\$ 32,472.00</b>	<b>\$ 32,472.00</b>	
	<b>Subtotal 1460</b>			<b>\$ 253,299.28</b>	<b>\$ 242,031.82</b>	<b>\$ 242,031.82</b>	<b>\$ 242,031.82</b>	
	<b>Subtotal 1470</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Subtotal 1475</b>			<b>\$ 8,842.00</b>	<b>\$ 8,299.17</b>	<b>\$ 8,299.17</b>	<b>\$ 8,299.17</b>	
<b>IL056-2</b>		1450		\$ -	\$ -			
		1450		\$ -	\$ -			
	Replace Carpeting	1460		\$ -	\$ -			
	Replace Boiler	1460		\$ 10,000.00	\$ 84,346.00	\$ 84,346.00	\$ 84,346.00	
	Rekey Apartments	1460		\$ -	\$ -			
	Renovate Common Area	1460		\$ 89,100.00	\$ 71,887.21	\$ 71,887.21	\$ 71,887.21	
	Replace Standby Pump	1460		\$ -	\$ -			
	Replace Furniture	1475		\$ -	\$ -			
	<b>Subtotal 1450</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Subtotal 1460</b>			<b>\$ 99,100.00</b>	<b>\$ 156,233.21</b>	<b>\$ 156,233.21</b>	<b>\$ 156,233.21</b>	
	<b>Subtotal 1475</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date

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

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

Performance & Evaluation Report for Program 501-02 Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity			Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-4 Beach Haven</b>		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -			
	Replace Shower Heads	1460	98	\$ 4,900.00	\$ -	\$ -	\$ -	
	Complete Rehab	1460		\$ -	\$ 8,535.00	\$ 8,535.00	\$ 8,535.00	
	Renovate Common Area	1460		\$ 51,960.00	\$ -	\$ -	\$ -	
	Install Emergency Call System	1465		\$ 17,920.00	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Subtotal 1460</b>			<b>\$ 56,860.00</b>	<b>\$ 8,535.00</b>	<b>\$ 8,535.00</b>	<b>\$ 8,535.00</b>	
	<b>Subtotal 1465</b>			<b>\$ 17,920.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>IL 056-7 Scattered Site</b>		1450		\$ -	\$ -			
		1460		\$ -	\$ -			
		1460		\$ -	\$ -			
	Complete Rehabilitations	1460	2	\$ 21,138.00	\$ 18,098.00	\$ 18,098.00	\$ 18,098.00	
		1460		\$ -	\$ -			
		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Subtotal 1460</b>			<b>\$ 21,138.00</b>	<b>\$ 18,098.00</b>	<b>\$ 18,098.00</b>	<b>\$ 18,098.00</b>	
<b>IL056-8 Scattered site PHA Office</b>		1450		\$ -	\$ -	\$ -	\$ -	
	Rekey Apartments	1460		\$ -	\$ -	\$ -	\$ -	
	Replace air Exchangers	1460		\$ 25,700.00	\$ 25,700.00	\$ 25,700.00	\$ 25,700.00	
	Replace Window Treatment	1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1470		\$ -	\$ -	\$ -	\$ -	
	Replace Furniture	1475		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Subtotal 1460</b>			<b>\$ 25,700.00</b>	<b>\$ 25,700.00</b>	<b>\$ 25,700.00</b>	<b>\$ 25,700.00</b>	
<b>Subtotal 1470</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>		
<b>Subtotal 1475</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>		

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for Program 501-02 Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	General Description of Major Work Categories	Development Account Number	Quantity			Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>HA Wide Activities</b>								
<b>IL056-11</b>								
		1450		\$ -	\$ -			
		1450		\$ -	\$ -			
	Reykey Apartments	1460		\$ -	\$ -	\$ -		
	Replace air Exchangers	1460		\$ 25,700.00	\$ 25,700.00	\$ 25,700.00	\$ 25,700.00	
	Replace Window Treatment	1460		\$ 4,000.00	\$ -	\$ -		
				\$ -	\$ -	\$ -	\$ -	
				\$ 29,700.00	\$ 25,700.00	\$ 25,700.00	\$ 25,700.00	
<b>IL056-12</b>								
<b>Scattered Site</b>								
		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
	Siding Replacement	1460		\$ 6,225.00	\$ 6,225.00	\$ 6,225.00	\$ 6,225.00	
		1460		\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
				\$ 6,225.00	\$ 6,225.00	\$ 6,225.00	\$ 6,225.00	
<b>IL056-13</b>								
<b>Warren Manor</b>								
	Landscape Improvement	1450		\$ 2,100.00	\$ 2,100.00	\$ 2,100.00	\$ 2,100.00	
	Reykey Apartments	1460		\$ -	\$ -			
		1460						
	Replace Furniture	1475						
				\$ 2,100.00	\$ 2,100.00	\$ 2,100.00	\$ 2,100.00	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
<b>IL056-15</b>								
<b>Scattered Site</b>								
		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
	Complete Rehabilitation	1460		\$ 70,050.00	\$ 68,750.00	\$ 68,750.00	\$ 68,750.00	
	Siding Replacement	1460		\$ 10,736.00	\$ 11,186.00	\$ 11,186.00	\$ 11,186.00	
	Lead Paint Abatement	1460		\$ -	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00	
		1460		\$ -	\$ -	\$ -	\$ -	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for Program 501-02 Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity			Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-15</b>		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ <b>80,786.00</b>	\$ <b>85,936.00</b>	\$ <b>85,936.00</b>	\$ <b>85,936.00</b>	
<b>IL056-16</b> <u>Scattered Site</u>		1450		\$ -	\$ -	\$ -	\$ -	0
		1460		\$ -	\$ -	\$ -	\$ -	0
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -	
<b>IL056-18</b>	Rehab Units	1460		\$ 30,603.00	\$ 30,603.00	\$ 30,603.00	\$ 30,603.00	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ <b>30,603.00</b>	\$ <b>30,603.00</b>	\$ <b>30,603.00</b>	\$ <b>30,603.00</b>	
<b>IL056-20</b>		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report  
Signature of Executive Director and Date

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

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

Performance & Evaluation Report for Program 501-02 Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity			Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-22</b>	Landscape Improvements	1450		\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	\$ 10,000.00	
		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			<b>\$ 10,000.00</b>	<b>\$ 10,000.00</b>	<b>\$ 10,000.00</b>	<b>\$ 10,000.00</b>	
	<b>Subtotal 1450</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Total 1460</b>			<b>\$ 603,411.28</b>	<b>\$ 599,062.03</b>	<b>\$ 599,062.03</b>	<b>\$ 599,062.03</b>	
	<b>Total 1470</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Total 1450</b>			<b>\$ 26,967.70</b>	<b>\$ 44,572.00</b>	<b>\$ 44,572.00</b>	<b>\$ 44,572.00</b>	
	<b>Total 1465</b>			<b>\$ 17,920.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Total 1475</b>			<b>\$ 15,012.00</b>	<b>\$ 14,469.17</b>	<b>\$ 14,469.17</b>	<b>\$ 14,469.17</b>	
	<b>HA-Wide</b>	A. Contingency	1502		\$ -	\$ -	\$ -	\$ -
	<b>Subtotal</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>HA-Wide</b>	Operations	1406		\$ -	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00	
	<b>Subtotal</b>			<b>\$ -</b>	<b>\$ 50,000.00</b>	<b>\$ 50,000.00</b>	<b>\$ 50,000.00</b>	
	<b>Grand Total</b>			<b>\$ 1,010,852.00</b>	<b>\$ 1,010,852.00</b>	<b>\$ 1,010,852.00</b>	<b>\$ 972,138.18</b>	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement

(2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date

Signature of Public Housing Director/Office of Native American Program Administrator and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part I: Summary**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

OMB approval No. 2577-0157 (Exp. 7/31/98)

HA Name <b>Lake County Housing Authority</b>				Comp Grant Number <b>IL06P056-501-02</b>	FFY of Grant Approval <b>2002</b>
___ Original Annual Statement		___ Reserve for Disasters/Emergencies		___ Revised Annual Statement/Revision Number ___	
___ Final Performance & Evaluation Report		___ Performance & Evaluation Report for Program Year Ending 03/31/05			
Line #	Summary by Development Accounts	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations (May not exceed 20% of line 19)	\$ -	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00
3	1408 Management Improvements	\$ 175,000.00	\$ 125,000.00	\$ 125,000.00	\$ 108,952.78
4	1410 Administration	\$ 101,085.00	\$ 101,085.00	\$ 101,085.00	\$ 101,085.00
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees & Cost	\$ 71,456.02	\$ 76,663.80	\$ 76,663.80	\$ 53,997.20
8	1440 Site Acquisition				
9	1450 Site Improvement	\$ 26,967.70	\$ 44,572.00	\$ 44,572.00	\$ 44,572.00
10	1460 Dwelling Structures	\$ 603,411.28	\$ 599,062.03	\$ 599,062.03	\$ 599,062.03
11	1465.1 Dwelling Equipment-Nonexpendable	\$ 17,920.00	\$ -	\$ -	\$ -
12	1470 Nondwelling Structures	\$ -	\$ -	\$ -	\$ -
13	1475 Nondwelling Equipment	\$ 15,012.00	\$ 14,469.17	\$ 14,469.17	\$ 14,469.17
14	1485 Demolition				
15	1490 Replacement Reserves				
16	1495.1 Relocation Costs				
17	1498 Mod Used for Development				
18	1502 Contingency (may not exceed 8% of line 19)	\$ -	\$ -	\$ -	\$ -
19	<b>Amount of Annual Grant (Sum of lines 2-18)</b>	\$ 1,010,852.00	\$ 1,010,852.00	\$ 1,010,852.00	\$ 972,138.18
20	Amount of Line 19 related to LBP Activities				
21	Amount of Line 19 related to Section 504 Compliance				
22	Amount of Line 19 related to Security				
23	Amount of Line 19 related to Energy Conservation Measures				
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report					
Signature of Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date	
X				X	

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

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

Performance & Evaluation Report for Program 501-02 Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
HA Wide Activities							
<b>IL 056-001 Marion Jones</b>	9/30/2004		9/30/2004	9/30/2006			
<b>IL 056-002 Shiloh Towers</b>	9/30/2004		9/30/2004	9/30/2006			
<b>IL056-004 Beach Haven T.</b>	9/30/2004		9/30/2004	9/30/2006			
<b>IL056-007 Scattered Site</b>	9/30/2004		9/30/2004	9/30/2006			
<b>IL056-008 Hawlwyl, millview</b>	9/30/2004		9/30/2004	9/30/2006			
<b>Kuester &amp; Scattered Site</b>							
<b>IL056-011 Hawley Orchard</b>	9/30/2004		9/30/2004	9/30/2006			
<b>IL056-012 Scattered Site</b>	9/30/2004		9/30/2004	9/30/2006			
<b>IL056-013 Warren Manor</b>	9/30/2004		9/30/2004	9/30/2006			
<b>IL056-014 Scattered Site</b>							
<b>IL056-015 Scattered Site</b>	9/30/2004		9/30/2004	9/30/2006			
<b>IL056-016 Scattered Site</b>							
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement				(2) To be completed for the Performance & Evaluation Report			
Signature of the Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date			

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

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

Performance & Evaluation Report for Program 501-02 Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
HA Wide Activities							
<b>IL 056-017 Scattered Site</b>							
<b>IL 056-018 Scattered Site</b>	9/30/2004		9/30/2004	9/30/2006			
<b>IL056-019 Scattered Site</b>							
<b>IL056-020 Scattered Site</b>							
<b>IL056-021 Scattered Site</b>							
<b>IL056-022 Disabled</b>	9/30/2004		9/30/2004	9/30/2006			
<b>HA-Wide</b>	9/30/2004		9/30/2004	9/30/2006			
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement				(2) To be completed for the Performance & Evaluation Report			
Signature of the Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date			

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 501-03 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>HA Wide Activities</b>								
<b>HA-Wide</b>	<b>Management Improvement</b>							
	Resident Safety & Security	1408		\$ 100,000.00	\$ 74,250.00	\$ 74,250.00	\$ 31,471.68	
	Information Technolgy Upgrade	1408		\$ 30,000.00	\$ 30,294.00	\$ 30,294.00	\$ 30,294.00	
	Resident Initiatives	1408		\$ 45,000.00	\$ 45,000.00	\$ 2,478.90	\$ 2,478.90	
	<b>Subtotal</b>			<b>\$ 175,000.00</b>	<b>\$ 149,544.00</b>	<b>\$ 107,022.90</b>	<b>\$ 64,244.58</b>	
<b>HA-Wide</b>	<b>Administration</b>							
	Salary	1410		\$ 62,000.00	\$ 42,000.00	\$ 42,000.00	\$ 33,405.49	
	EBC	1410		\$ 32,085.00	\$ 52,085.00	\$ 52,085.00	\$ 36,278.16	
	Travel	1410		\$ 2,000.00	\$ 2,000.00	\$ 2,000.00	\$ 375.00	
	Sundry	1410		\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	\$ 2,198.85	
	<b>Subtotal</b>			<b>\$ 101,085.00</b>	<b>\$ 101,085.00</b>	<b>\$ 101,085.00</b>	<b>\$ 72,257.50</b>	
<b>HA-Wide</b>	<b>Fees and Costs</b>							
	Consultant	1430		\$ 5,000.00	\$ 5,000.00	\$ -	\$ -	
	A and E	1430		\$ 25,000.00	\$ 51,275.21	\$ 48,404.13	\$ 29,304.13	
	Inspections	1430		\$ 50,000.00	\$ 50,000.00	\$ -	\$ -	
	Sundry	1430		\$ 5,000.00	\$ 5,000.00	\$ -	\$ -	
	Annual Inspection of Units	1430		\$ 13,000.00	\$ 13,000.00	\$ -	\$ -	
	<b>Subtotal</b>			<b>\$ 98,000.00</b>	<b>\$ 124,275.21</b>	<b>\$ 48,404.13</b>	<b>\$ 29,304.13</b>	
<b>HA-Wide</b>		1475		\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date Signature of Public Housing Director/Office of Native American Program Administrator and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 501-03 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA Wide Activities								
<b>IL056-1</b>								
<b>Marion Jones</b>	Landscaping	1450		\$ -	\$ 43,770.50	\$ 43,770.50	\$ 13,794.80	
		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
	Bathroom Replacement	1460		\$ 50,000.00	\$ -	\$ -	\$ -	
	Cycle Painting	1460		\$ 12,210.00	\$ 56,660.00	\$ 56,660.00	\$ 56,159.00	
	Completer Rehab/ Vacant unit	1460		\$ -	\$ 200.00	\$ 200.00	\$ 200.00	
	Asbestos Abatement	1460		\$ -	\$ 7,200.00	\$ 7,200.00	\$ 1,646.00	
		1470		\$ -	\$ -	\$ -	\$ -	
	Replace Community Bldg. Furniture	1475		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ 43,770.50	\$ 43,770.50	\$ 13,794.80	
	<b>Subtotal 1460</b>			\$ 62,210.00	\$ 64,060.00	\$ 64,060.00	\$ 58,005.00	
	<b>Subtotal 1470</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1475</b>			\$ -	\$ -	\$ -	\$ -	
<b>IL056-2</b>								
		1450		\$ -	\$ -			
		1450		\$ -	\$ -			
	Renovate Common Area	1460		\$ 52,596.00	\$ 205,985.87	\$ 205,985.87	\$ 205,985.87	
	Replace Boiler	1460			\$ 8,171.00	\$ 8,171.00	\$ 8,171.00	
	Door lock & Hardware Replacement	1460			\$ 20,515.70	\$ 20,515.70		
		1460						
	Replace Furniture	1475		\$ 5,000.00	\$ 4,400.99	\$ 4,221.73	\$ 4,221.73	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ 52,596.00	\$ 234,672.57	\$ 234,672.57	\$ 214,156.87	
	<b>Subtotal 1475</b>			\$ 5,000.00	\$ 4,400.99	\$ 4,221.73	\$ 4,221.73	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date Signature of Public Housing Director/Office of Native American Program Administrator and Date

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

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

Performance & Evaluation Report for 501-03 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-4 Beach Haven</b>	Renovate Common Area	1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -			
		1460		\$ 42,595.00	\$ -	\$ -		
		1460		\$ -	\$ -	\$ -		
		1460		\$ -	\$ -	\$ -	\$ -	
	Replace Furnitures	1475		\$ 5,000.00	\$ 5,000.00	\$ -	\$ -	
		<b>Subtotal 1450</b>		<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
		<b>Subtotal 1460</b>		<b>\$ 42,595.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
		<b>Subtotal 1465</b>		<b>\$ 5,000.00</b>	<b>\$ 5,000.00</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>IL 056-7 Scattered Site</b>	Replace Air Exchangers	1450		\$ -	\$ -		
1460				\$ -	\$ -			
1460				\$ -	\$ -			
1460			2	\$ 15,000.00	\$ -	\$ -		
1460				\$ -	\$ -	\$ -		
1460				\$ -	\$ -	\$ -		
<b>Subtotal 1450</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>		
<b>Subtotal 1460</b>		<b>\$ 15,000.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>			
<b>IL056-8 Scattered site PHA Office</b>	Renovate Common Areas	1450		\$ -	\$ -	\$ -	\$ -	
		1460		\$ 100,000.00	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
	Replace Window Treatment	1460		\$ 6,000.00	\$ -	\$ -	\$ -	
		1460		\$ -	\$ 16,034.00	\$ 1,789.00	\$ 1,789.00	
	General Rehab	1460		\$ -	\$ 19,074.00	\$ 10,574.00	\$ -	
		1470		\$ -	\$ -	\$ -	\$ -	
	Renovate Office Building	1460		\$ -	\$ -	\$ -	\$ -	
		1475		\$ 15,000.00	\$ 13,505.00			
	<b>Subtotal 1450</b>		<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>		
<b>Subtotal 1460</b>		<b>\$ 106,000.00</b>	<b>\$ 35,108.00</b>	<b>\$ 12,363.00</b>	<b>\$ 1,789.00</b>			
<b>Subtotal 1470</b>		<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>			
<b>Subtotal 1475</b>		<b>\$ 15,000.00</b>	<b>\$ 13,505.00</b>	<b>\$ -</b>	<b>\$ -</b>			

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report

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**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 501-03 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)		
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)			
<b>IL056-11</b>		1450		\$ -	\$ -					
		1450		\$ -	\$ -					
		1460		\$ -	\$ -	\$ -				
		1460		\$ -	\$ -					
		1460		\$ -	\$ -	\$ -				
						\$ -	\$ -	\$ -		
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -			
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -			
<b>IL056-12</b> <u>Scattered Site</u>		1450		\$ -	\$ -	\$ -	\$ -			
		1450		\$ -	\$ -	\$ -	\$ -			
		1460		\$ -	\$ -	\$ -	\$ -			
		1460		\$ -	\$ -	\$ -	\$ -			
						\$ -	\$ -	\$ -		
						\$ -	\$ -	\$ -		
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -			
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -			
<b>IL056-13</b> <u>Warren Manor</u>	Water Line Replacement	1450		\$ -	\$ 66,434.77	\$ 66,434.77	\$ 66,434.77	Emergency		
		1460		\$ -	\$ -					
		1460		\$ -	\$ -					
		1475		\$ -	\$ -					
						\$ -	\$ 66,434.77		\$ 66,434.77	\$ 66,434.77
						\$ -	\$ -		\$ -	\$ -
	<b>Subtotal 1450</b>			\$ -	\$ 66,434.77	\$ 66,434.77	\$ 66,434.77			
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -			
	<b>Subtotal 1475</b>			\$ -	\$ -	\$ -	\$ -			
<b>IL056-15</b> <u>Scattered Site</u>	Complete Rehab/ Vacant Unit	1450		\$ -	\$ -	\$ -	\$ -			
		1450		\$ -	\$ -	\$ -	\$ -			
		1460		\$ -	\$ 40,785.00	\$ 40,785.00	\$ 27,255.00			
		1460		\$ -	\$ -	\$ -	\$ -			
		1460		\$ -	\$ -	\$ -	\$ -			
		1460		\$ -	\$ -	\$ -	\$ -			

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date Signature of Public Housing Director/Office of Native American Program Administrator and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 501-03 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-15</b>		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ 40,785.00	\$ 40,785.00	\$ 27,255.00	
<b>IL056-16</b> <u>Scattered Site</u>		1450		\$ -	\$ -	\$ -	\$ -	0
	Replace Siding and Roof System	1460		\$ 30,000.00	\$ 30,000.00	\$ -	\$ -	0
	Complete Rehab/ Vacant Units	1460		\$ -	\$ 23,920.00	\$ 23,920.00	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ 30,000.00	\$ 53,920.00	\$ 23,920.00	\$ -	
<b>IL056-18</b>		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -	
<b>IL056-20</b>		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement	(2) To be completed for the Performance & Evaluation Report
Signature of Executive Director and Date	Signature of Public Housing Director/Office of Native American Program Administrator and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 501-03 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>HA Wide Activities</b>								
<b>HA-Wide</b>	Replace Driveway	1450		\$ 40,000.00	\$ -	\$ -	\$ -	
	Cyclical Painting	1460		\$ 57,107.00	\$ -	\$ -	\$ -	
	Storm/Screen Doors	1460		\$ 25,000.00	\$ 25,000.00	\$ -	\$ -	
	Complete Rehab Vacant Unit	1460		\$ 100,000.00	\$ -	\$ -	\$ -	
	Door Lock and Hardware Replacemen	1460		\$ 75,000.00	\$ 67,481.96	\$ 64,481.96	\$ 63,396.65	
	<b>Subtotal 1450</b>			<b>\$ 40,000.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Subtotal 1460</b>			<b>\$ 257,107.00</b>	<b>\$ 92,481.96</b>	<b>\$ 64,481.96</b>	<b>\$ 63,396.65</b>	
	<b>Total 1460</b>			<b>\$ 565,508.00</b>	<b>\$ 521,027.53</b>	<b>\$ 440,282.53</b>	<b>\$ 364,602.52</b>	
	<b>Total 1470</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Total 1450</b>			<b>\$ 40,000.00</b>	<b>\$ 110,205.27</b>	<b>\$ 110,205.27</b>	<b>\$ 80,229.57</b>	
	<b>Total 1465</b>			<b>\$ 5,000.00</b>	<b>\$ 5,000.00</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Total 1475</b>			<b>\$ 20,000.00</b>	<b>\$ 17,905.99</b>	<b>\$ 4,221.73</b>	<b>\$ 4,221.73</b>	
<b>HA-Wide</b>	A. Contingency	1502		\$ 21,450.00	\$ -	\$ -	\$ -	
	<b>Subtotal</b>			<b>\$ 21,450.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>HA-Wide</b>	Operations	1406		\$ 50,000.00	\$ 50,000.00	\$ 50,000.00	\$ -	
	<b>Subtotal</b>			<b>\$ 50,000.00</b>	<b>\$ 50,000.00</b>	<b>\$ 50,000.00</b>	<b>\$ -</b>	
	<b>Grand Total</b>			<b>\$ 1,076,043.00</b>	<b>\$ 1,079,043.00</b>	<b>\$ 861,221.56</b>	<b>\$ 614,860.03</b>	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date Signature of Public Housing Director/Office of Native American Program Administrator and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part I: Summary**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

OMB approval No. 2577-0157 (Exp. 7/31/98)

HA Name <b>Lake County Housing Authority</b>				Comp Grant Number <b>IL06P056-501-03</b>	FFY of Grant Approval <b>2003</b>
___ Original Annual Statement		___ Reserve for Disasters/Emergencies		___ Revised Annual Statement/Revision Number ___	
___ Final Performance & Evaluation Report		___ Performance & Evaluation Report for Program Year Ending 03/31/05			
Line #	Summary by Development Accounts	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations (May not exceed 20% of line 19)	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00	\$ -
3	1408 Management Improvements	\$ 175,000.00	\$ 149,544.00	\$ 107,022.90	\$ 64,244.58
4	1410 Administration	\$ 101,085.00	\$ 101,085.00	\$ 101,085.00	\$ 72,257.50
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees & Cost	\$ 98,000.00	\$ 124,275.21	\$ 48,404.13	\$ 29,304.13
8	1440 Site Acquisition				
9	1450 Site Improvement	\$ 40,000.00	\$ 110,205.27	\$ 110,205.27	\$ 80,229.57
10	1460 Dwelling Structures	\$ 565,508.00	\$ 521,027.53	\$ 440,282.53	\$ 364,602.52
11	1465.1 Dwelling Equipment-Nonexpendable	\$ 5,000.00	\$ 5,000.00	\$ -	\$ -
12	1470 Nondwelling Structures	\$ -	\$ -	\$ -	\$ -
13	1475 Nondwelling Equipment	\$ 20,000.00	\$ 17,905.99	\$ 4,221.73	\$ 4,221.73
14	1485 Demolition				
15	1490 Replacement Reserves				
16	1495.1 Relocation Costs				
17	1498 Mod Used for Development				
18	1502 Contingency (may not exceed 8% of line 19)	\$ 21,450.00	\$ -	\$ -	\$ -
19	<b>Amount of Annual Grant (Sum of lines 2-18)</b>	\$ 1,076,043.00	\$ 1,079,043.00	\$861,222	\$614,860
20	Amount of Line 19 related to LBP Activities				
21	Amount of Line 19 related to Section 504 Compliance				
22	Amount of Line 19 related to Security				
23	Amount of Line 19 related to Energy Conservation Measures				
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement		(2) To be completed for the Performance & Evaluation Report			
Signature of Executive Director and Date <b>X</b>			Signature of Public Housing Director/Office of Native American Programs Administrator and Date <b>X</b>		

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

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

Performance & Evaluation Report for 501-03 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
HA Wide Activities							
<b>IL 056-001 Marion Jones</b>	9/17/2005			9/17/2007			
<b>IL 056-002 Shiloh Towers</b>	9/17/2005			9/17/2007			
<b>IL056-004 Beach Haven T.</b>	9/17/2005			9/17/2007			
<b>IL056-007 Scattered Site</b>	9/17/2005			9/17/2007			
<b>IL056-008 Hawly, millview Kuester &amp; Scattered Site</b>	9/17/2005			9/17/2007			
<b>IL056-011 Hawley Orchard</b>							
<b>IL056-012 Scattered Site</b>							
<b>IL056-013 Warren Manor</b>							
<b>IL056-014 Scattered Site</b>							
<b>IL056-015 Scattered Site</b>							
<b>IL056-016 Scattered Site</b>	9/17/2005			9/17/2007			
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement				(2) To be completed for the Performance & Evaluation Report			
Signature of the Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date			

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

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

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
HA Wide Activities							
<b>IL 056-017 Scattered Site IL 056-018 Scattered Site IL056-019 Scattered Site IL056-020 Scattered Site IL056-021 Scattered Site IL056-022 Disabled HA-Wide</b>	9/17/2005			9/17/2007			
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement				(2) To be completed for the Performance & Evaluation Report			
Signature of the Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date			

**Annual Statement/Performance  
and Evaluation Report**

**Part I: Summary**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

OMB approval No. 2577-0157 (Exp. 7/31/98)

HA Name <b>Lake County Housing Authority</b>				Comp Grant Number <b>IL06P056-502-01</b>	FFY of Grant Approval <b>2003</b>
___ Original Annual Statement		___ Reserve for Disasters/Emergencies		___ Revised Annual Statement/Revision Number ___	
___ Final Performance & Evaluation Report		___ Performance & Evaluation Report for Program Year Ending 03/31/05			
Line #	Summary by Development Accounts	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations (May not exceed 20% of line 19)	\$ -	\$ -	\$ -	\$ -
3	1408 Management Improvements	\$ -	\$ -	\$ -	\$ -
4	1410 Administration	\$ -	\$ -	\$ -	\$ -
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees & Cost	\$ -	\$ -	\$ -	\$ -
8	1440 Site Acquisition				
9	1450 Site Improvement	\$ -	\$ -	\$ -	\$ -
10	1460 Dwelling Structures	\$ 214,450.00	\$ 214,450.00	\$ 210,434.60	\$ 189,783.90
11	1465.1 Dwelling Equipment-Nonexpendable				
12	1470 Nondwelling Structures	\$ -	\$ -	\$ -	\$ -
13	1475 Nondwelling Equipment	\$ -	\$ -	\$ -	\$ -
14	1485 Demolition				
15	1490 Replacement Reserves				
16	1495.1 Relocation Costs				
17	1498 Mod Used for Development				
18	1502 Contingency (may not exceed 8% of line 19)	\$ -	\$ -	\$ -	\$ -
19	<b>Amount of Annual Grant (Sum of lines 2-18)</b>	\$ 214,450.00	\$ 214,450.00	\$ 210,434.60	\$ 189,783.90
20	Amount of Line 19 related to LBP Activities				
21	Amount of Line 19 related to Section 504 Compliance				
22	Amount of Line 19 related to Security				
23	Amount of Line 19 related to Energy Conservation Measures				
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report					
Signature of Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date	
X				X	

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 502-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>HA-Wide</b>	<b>Management Improvement</b>	1408		\$ -	\$ -	\$ -	\$ -	
		1408		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal</b>		\$ -	\$ -	\$ -	\$ -	
<b>HA-Wide</b>	<b>Administration</b>	1410		\$ -	\$ -	\$ -	\$ -	
		1410		\$ -	\$ -	\$ -	\$ -	
		1410		\$ -	\$ -	\$ -	\$ -	
		1410		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal</b>		\$ -	\$ -	\$ -	\$ -	
<b>HA-Wide</b>	<b>Fees and Costs</b>	1430		\$ -	\$ -	\$ -	\$ -	
		1430		\$ -	\$ -	\$ -	\$ -	
		1430		\$ -	\$ -	\$ -	\$ -	
		1430		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal</b>		\$ -	\$ -	\$ -	\$ -	
<b>HA-Wide</b>	<b>Equipment</b>	1475		\$ -	\$ -	\$ -	\$ -	
		1475		\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal</b>		\$ -	\$ -	\$ -	\$ -	

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**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 502-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-1</b> <b>Marion Jones</b>	Bathroom Replacement Part II	1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
		1460		\$ 163,050.00	\$ 163,050.00	\$ 159,034.60	\$ 138,383.90	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1470		\$ -	\$ -	\$ -	\$ -	
		1470		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1450</b>		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>		\$ 163,050.00	\$ 163,050.00	\$ 159,034.60	\$ 138,383.90		
	<b>Subtotal 1470</b>		\$ -	\$ -	\$ -	\$ -		
<b>IL056-8</b>	Replace Airexchanger Units	1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
		1460		\$ 25,700.00	\$ 25,700.00	\$ 25,700.00	\$ 25,700.00	
		<b>Subtotal 1450</b>		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1460</b>		\$ 25,700.00	\$ 25,700.00	\$ 25,700.00	\$ 25,700.00	
<b>IL056-11</b> <b>Orchard Manor</b>	Replace Airexchanger Units	1450		\$ -	\$ -	\$ -	\$ -	
		1460		\$ 25,700.00	\$ 25,700.00	\$ 25,700.00	\$ 25,700.00	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement      (2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date      Signature of Public Housing Director/Office of Native American Program Administrator and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 502-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-11</b>		1460		\$ -	\$ -	\$ -	\$ -	
<b>Orchard Manor</b>								
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ 25,700.00	\$ 25,700.00	\$ 25,700.00	\$ 25,700.00	
<b>IL 056-7</b>		1450		\$ -	\$ -	\$ -	\$ -	
<b>Scattered Site</b>		1450		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -	
<b>IL056-8</b>		1450		\$ -	\$ -	\$ -	\$ -	
<b>Scallered site</b>		1450		\$ -	\$ -	\$ -	\$ -	
<b>PHA Office</b>		1450		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1470		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1470</b>			\$ -	\$ -	\$ -	\$ -	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date Signature of Public Housing Director/Office of Native American Program Administrator and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 502-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-12</b> <b>Scattered Site</b>		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1450</b>		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1460</b>		\$ -	\$ -	\$ -	\$ -	
<b>IL056-13</b> <b>Warren Manor</b>		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1450</b>		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1460</b>		\$ -	\$ -	\$ -	\$ -	
	<b>IL056-14</b> <b>Scattered Site</b>		1450		\$ -	\$ -	\$ -	\$ -
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1450</b>		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1460</b>		\$ -	\$ -	\$ -	\$ -	
<b>IL056-15</b> <b>Scattered Site</b>		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
		1460	1	\$ -	\$ -	\$ -	\$ -	
		1460	1	\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement	(2) To be completed for the Performance & Evaluation Report
Signature of Executive Director and Date	Signature of Public Housing Director/Office of Native American Program Administrator and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 502-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-15</b>		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -	
<b>IL056-16</b> <u>Scattered Site</u>		1450		\$ -	\$ -	\$ -	\$ -	0
		1460	2	\$ -	\$ -	\$ -	\$ -	0
		1460	1	\$ -	\$ -	\$ -	\$ -	
		1460	2	\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -	
<b>IL056-17</b>		1450		\$ -	\$ -	\$ -	\$ -	
<b>IL056-18</b>		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -	
<b>IL056-19</b>		1450		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	3786
		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement

(2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date

Signature of Public Housing Director/Office of Native American Program Administrator and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

Performance & Evaluation Report for 502-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-20</b>		1450		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1450</b>		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1460</b>		\$ -	\$ -	\$ -	\$ -	
<b>IL056-21</b>		1450		\$ -	\$ -	\$ -	\$ -	
<b>IL056-22</b>		1450		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1450</b>		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1450</b>		\$ -	\$ -	\$ -	\$ -	
			<b>Total 1460</b>	\$ 214,450.00	\$ 214,450.00	\$ 210,434.60	\$ 189,783.90	
			<b>Total 1470</b>	\$ -	\$ -	\$ -	\$ -	
			<b>Total 1450</b>	\$ -	\$ -	\$ -	\$ -	
<b>HA-Wide</b>	A. Contingency	1502		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal</b>			\$ -	\$ -	\$ -	\$ -	
<b>HA-Wide</b>	Operations	1406		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Grand Total</b>			\$ 214,450.00	\$ 214,450.00	\$ 210,434.60	\$ 189,783.90	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement      (2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date      Signature of Public Housing Director/Office of Native American Program Administrator and Date

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

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

Performance & Evaluation Report for 502-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
HA Wide Activities							
<b>IL 056-001 Marion Jones</b>	4/26/2006			4/26/2008			
<b>IL 056-002 Shiloh Towers</b>							
<b>IL056-004 Beach Haven T.</b>							
<b>IL056-007 Scattered Site</b>							
<b>IL056-008 Hawlwy, millview</b>	4/26/2006			4/26/2008			
<b>Kuester &amp; Scattered Site</b>							
<b>IL056-011 Hawley Orchard</b>	4/26/2006			4/26/2008			
<b>IL056-012 Scattered Site</b>							
<b>IL056-013 Warren Manor</b>							
<b>IL056-014 Scattered Site</b>							
<b>IL056-015 Scattered Site</b>							
<b>IL056-016 Scattered Site</b>							
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement				(2) To be completed for the Performance & Evaluation Report			
Signature of the Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date			

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

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

Performance & Evaluation Report for 501-01 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
HA Wide Activities							
<b>IL 056-017 Scattered Site</b>							
<b>IL 056-018 Scattered Site</b>							
<b>IL056-019 Scattered Site</b>							
<b>IL056-020 Scattered Site</b>							
<b>IL056-021 Scattered Site</b>							
<b>IL056-022 Disabled HA-Wide</b>							
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement				(2) To be completed for the Performance & Evaluation Report			
Signature of the Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date			

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 501-04 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>HA Wide Activities</b>								
<b>HA-Wide</b>	<b>Management Improvement</b>							
	Resident Safety & Security	1408		\$ 100,000.00	\$ 100,000.00	\$ 28,052.89	\$ -	
	Information Technolgy Upgrade	1408		\$ 30,000.00	\$ 30,000.00	\$ 18,161.00	\$ 6,261.00	
	Resident Initiatives	1408		\$ 45,000.00	\$ 45,000.00	\$ -	\$ -	
	<b>Subtotal</b>			<b>\$ 175,000.00</b>	<b>\$ 175,000.00</b>	<b>\$ 46,213.89</b>	<b>\$ 6,261.00</b>	
<b>HA-Wide</b>	<b>Administration</b>							
	Salary	1410		\$ 69,000.00	\$ 69,000.00	\$ -	\$ -	
	EBC	1410		\$ 32,085.00	\$ 32,085.00	\$ -	\$ -	
	Travel	1410		\$ -	\$ -	\$ -	\$ -	
	Sundry	1410		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal</b>			<b>\$ 101,085.00</b>	<b>\$ 101,085.00</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>HA-Wide</b>	<b>Fees and Costs</b>							
	Consultant	1430		\$ 5,000.00	\$ 5,000.00	\$ -	\$ -	
	A and E	1430		\$ 40,000.00	\$ 40,000.00	\$ -	\$ -	
	Inspections	1430		\$ -	\$ -	\$ -	\$ -	
	Sundry	1430		\$ 5,000.00	\$ 5,000.00	\$ -	\$ -	
	Annual Inspection of Units	1430		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal</b>			<b>\$ 50,000.00</b>	<b>\$ 50,000.00</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>HA-Wide</b>		1475		\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date Signature of Public Housing Director/Office of Native American Program Administrator and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 501-04 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-1</b>								
<b>Marion Jones</b>		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
	Gutters Fascia and Downspouts	1460		\$ 80,000.00	\$ 80,000.00	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1470		\$ -	\$ -	\$ -	\$ -	
		1475		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ 80,000.00	\$ 80,000.00	\$ -	\$ -	
	<b>Subtotal 1470</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1475</b>			\$ -	\$ -	\$ -	\$ -	
<b>IL056-2</b>								
	Fence Replacement / Repair	1450		\$ -	\$ 9,052.00	\$ 9,052.00		
		1450		\$ -	\$ -			
	Renovate Common Area	1460		\$ 62,569.00	\$ 62,569.00	\$ -	\$ -	
		1460			\$ -	\$ -	\$ -	
		1460			\$ -	\$ -	\$ -	
		1460			\$ -	\$ -	\$ -	
	Replace Furniture	1475		\$ 5,000.00	\$ 5,000.00	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ 9,052.00	\$ 9,052.00	\$ -	
	<b>Subtotal 1460</b>			\$ 62,569.00	\$ 62,569.00	\$ -	\$ -	
	<b>Subtotal 1475</b>			\$ 5,000.00	\$ 5,000.00	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	
				\$ -	\$ -	\$ -	\$ -	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement	(2) To be completed for the Performance & Evaluation Report
Signature of Executive Director and Date	Signature of Public Housing Director/Office of Native American Program Administrator and Date

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

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

Performance & Evaluation Report for 501-04 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-4 Beach Haven</b>	Renovate Common Area	1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -			
		1460		\$ 42,595.00	\$ 42,595.00	\$ -		
		1460		\$ -	\$ -	\$ -		
		1460		\$ -	\$ -	\$ -	\$ -	
	Replace Furnitures	1475		\$ 5,000.00	\$ 5,000.00	\$ -	\$ -	
		<b>Subtotal 1450</b>		<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
		<b>Subtotal 1460</b>		<b>\$ 42,595.00</b>	<b>\$ 42,595.00</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Subtotal 1465</b>		<b>\$ 5,000.00</b>	<b>\$ 5,000.00</b>	<b>\$ -</b>	<b>\$ -</b>		
	<b>IL 056-7 Scattered Site</b>	Replace Air Exchangers	1450		\$ -	\$ -		
1460				\$ -	\$ -			
1460				\$ -	\$ -			
1460			2	\$ 15,000.00	\$ 15,000.00	\$ -		
1460				\$ -	\$ -	\$ -		
1460				\$ -	\$ -	\$ -		
<b>Subtotal 1450</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>		
<b>Subtotal 1460</b>		<b>\$ 15,000.00</b>	<b>\$ 15,000.00</b>	<b>\$ -</b>	<b>\$ -</b>			
<b>IL056-8 Scattered site PHA Office</b>	Fence Replacement / Repair	1450		\$ -	\$ 9,052.00	\$ 9,052.00	\$ -	
	Renovate Common Areas	1460		\$ 100,000.00	\$ 100,000.00	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
	Replace Window Treatment	1460		\$ 6,000.00	\$ 6,000.00	\$ -	\$ -	
	General Rehab	1460		\$ -	\$ -	\$ -	\$ -	
	Renovate Office Building	1460		\$ -	\$ -	\$ -	\$ -	
		1470		\$ -	\$ -	\$ -	\$ -	
	Replace Furniture	1475		\$ 15,000.00	\$ 15,000.00			
	<b>Subtotal 1450</b>		<b>\$ -</b>	<b>\$ 9,052.00</b>	<b>\$ 9,052.00</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Subtotal 1460</b>		<b>\$ 106,000.00</b>	<b>\$ 106,000.00</b>	<b>\$ -</b>	<b>\$ -</b>		
<b>Subtotal 1470</b>		<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>			
<b>Subtotal 1475</b>		<b>\$ 15,000.00</b>	<b>\$ 15,000.00</b>	<b>\$ -</b>	<b>\$ -</b>			

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date Signature of Public Housing Director/Office of Native American Program Administrator and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 501-04 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-11</b>		1450		\$ -	\$ -			
		1450		\$ -	\$ -			
		1460		\$ -	\$ -	\$ -		
		1460		\$ -	\$ -			
		1460		\$ -	\$ -	\$ -		
		<b>Subtotal 1450</b>		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1460</b>		\$ -	\$ -	\$ -	\$ -	
<b>IL056-12</b> <u>Scattered Site</u>		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1450</b>		\$ -	\$ -	\$ -	\$ -	
		<b>Subtotal 1460</b>		\$ -	\$ -	\$ -	\$ -	
	<b>IL056-13</b> <u>Warren Manor</u>	Parking Lot and Water Main line Repa	1450		\$ 112,099.00	\$ 112,099.00	\$ -	\$ -
1460				\$ -	\$ -			
1460				\$ -	\$ -			
1475				\$ -	\$ -			
<b>Subtotal 1450</b>				\$ <b>112,099.00</b>	\$ <b>112,099.00</b>	\$ -	\$ -	
<b>Subtotal 1460</b>				\$ -	\$ -	\$ -	\$ -	
<b>Subtotal 1475</b>				\$ -	\$ -	\$ -	\$ -	
<b>IL056-15</b> <u>Scattered Site</u>		1450		\$ -	\$ -	\$ -	\$ -	
		1450		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report  
 Signature of Executive Director and Date Signature of Public Housing Director/Office of Native American Program Administrator and Date

**Annual Statement/Performance  
and Evaluation Report**

**Part II: Supporting Pages**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

Performance & Evaluation Report for 501-04 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name HA Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>IL056-15</b>		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -	
<b>IL056-16</b> <u>Scattered Site</u>		1450		\$ -	\$ -	\$ -	\$ -	0
		1460		\$ -	\$ -	\$ -	\$ -	0
		1460		\$ -	\$ -	\$ -	\$ -	
		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -	
<b>IL056-18</b>		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -	
<b>IL056-20</b>		1460		\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1450</b>			\$ -	\$ -	\$ -	\$ -	
	<b>Subtotal 1460</b>			\$ -	\$ -	\$ -	\$ -	

(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement      (2) To be completed for the Performance & Evaluation Report

Signature of Executive Director and Date      Signature of Public Housing Director/Office of Native American Program Administrator and Date

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

**U.S. Department of Housing  
and Urban Development  
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Performance & Evaluation Report for 501-04 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)	
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)		
HA Wide Activities									
<b>HA-Wide</b>	Replace Driveway	1450		\$ 85,000.00	\$ 85,000.00	\$ -	\$ -		
	Fence Replacement / Repair	1450		\$ 10,000.00	\$ -	\$ -	\$ -		
	Cyclical Painting	1460		\$ 39,317.00	\$ 39,317.00	\$ -	\$ -		
		1460		\$ -	\$ -	\$ -	\$ -		
	Complete Rehab Vacant Unit	1460		\$ 100,000.00	\$ 100,000.00	\$ -	\$ -		
	Door Lock and Hardware Replacemen	1460		\$ 75,000.00	\$ 75,000.00	\$ -	\$ -		
	Defabricators	1475		\$ 15,000.00	\$ 15,000.00				
	Maintenance Truck	1475		\$ 23,000.00	\$ 23,000.00				
		<b>Subtotal 1450</b>			<b>\$ 95,000.00</b>	<b>\$ 85,000.00</b>	<b>\$ -</b>	<b>\$ -</b>	
		<b>Subtotal 1460</b>			<b>\$ 214,317.00</b>	<b>\$ 214,317.00</b>	<b>\$ -</b>	<b>\$ -</b>	
		<b>Total 1460</b>			<b>\$ 520,481.00</b>	<b>\$ 520,481.00</b>	<b>\$ -</b>	<b>\$ -</b>	
	<b>Total 1470</b>			<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>		
	<b>Total 1450</b>			<b>\$ 207,099.00</b>	<b>\$ 215,203.00</b>	<b>\$ 18,104.00</b>	<b>\$ -</b>		
	<b>Total 1465</b>			<b>\$ 5,000.00</b>	<b>\$ 5,000.00</b>	<b>\$ -</b>	<b>\$ -</b>		
	<b>Total 1475</b>			<b>\$ 58,000.00</b>	<b>\$ 58,000.00</b>	<b>\$ -</b>	<b>\$ -</b>		
<b>HA-Wide</b>	A. Contingency	1502		\$ 21,450.00	\$ 13,346.00	\$ -	\$ -		
	<b>Subtotal</b>			<b>\$ 21,450.00</b>	<b>\$ 13,346.00</b>	<b>\$ -</b>	<b>\$ -</b>		
<b>HA-Wide</b>	Operations	1406		\$ 50,000.00	\$ 50,000.00	\$ -	\$ -		
	<b>Subtotal</b>			<b>\$ 50,000.00</b>	<b>\$ 50,000.00</b>	<b>\$ -</b>	<b>\$ -</b>		
	<b>Grand Total</b>			<b>\$ 1,188,115.00</b>	<b>\$ 1,188,115.00</b>	<b>\$ 64,317.89</b>	<b>\$ 6,261.00</b>		
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report									
Signature of Executive Director and Date				Signature of Public Housing Director/Office of Native American Program Administrator and Date					

**Annual Statement/Performance  
and Evaluation Report**

**Part I: Summary**

**Capital Fund Program (CFP)**

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

**Office of Public and Indian Housing**

OMB approval No. 2577-0157 (Exp. 7/31/98)

HA Name <b>Lake County Housing Authority</b>				Comp Grant Number <b>IL06P056-501-04</b>	FFY of Grant Approval <b>2004</b>
___ Original Annual Statement		___ Reserve for Disasters/Emergencies		___ Revised Annual Statement/Revision Number ___	
___ Final Performance & Evaluation Report		___ Performance & Evaluation Report for Program Year Ending 03/31/05			
Line #	Summary by Development Accounts	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations (May not exceed 20% of line 19)	\$ 50,000.00	\$ 50,000.00	\$ -	\$ -
3	1408 Management Improvements	\$ 175,000.00	\$ 175,000.00	\$ 46,213.89	\$ 6,261.00
4	1410 Administration	\$ 101,085.00	\$ 101,085.00	\$ -	\$ -
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees & Cost	\$ 50,000.00	\$ 50,000.00	\$ -	\$ -
8	1440 Site Acquisition				
9	1450 Site Improvement	\$ 207,099.00	\$ 215,203.00	\$ 18,104.00	\$ -
10	1460 Dwelling Structures	\$ 520,481.00	\$ 520,481.00	\$ -	\$ -
11	1465.1 Dwelling Equipment-Nonexpendable	\$ 5,000.00	\$ 5,000.00	\$ -	\$ -
12	1470 Nondwelling Structures	\$ -	\$ -	\$ -	\$ -
13	1475 Nondwelling Equipment	\$ 58,000.00	\$ 58,000.00	\$ -	\$ -
14	1485 Demolition				
15	1490 Replacement Reserves				
16	1495.1 Relocation Costs				
17	1498 Mod Used for Development				
18	1502 Contingency (may not exceed 8% of line 19)	\$ 21,450.00	\$ 13,346.00	\$ -	\$ -
19	<b>Amount of Annual Grant (Sum of lines 2-18)</b>	\$ 1,188,115.00	\$ 1,188,115.00	\$ 64,317.89	\$ 6,261.00
20	Amount of Line 19 related to LBP Activities				
21	Amount of Line 19 related to Section 504 Compliance				
22	Amount of Line 19 related to Security				
23	Amount of Line 19 related to Energy Conservation Measures				
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement (2) To be completed for the Performance & Evaluation Report					
Signature of Executive Director and Date <b>X</b>				Signature of Public Housing Director/Office of Native American Programs Administrator and Date <b>X</b>	

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

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

Performance & Evaluation Report for 501-04 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
HA Wide Activities							
<b>IL 056-001 Marion Jones</b>	9/17/2006			9/17/2008			
<b>IL 056-002 Shiloh Towers</b>	9/17/2006			9/17/2008			
<b>IL056-004 Beach Haven T.</b>	9/17/2006			9/17/2008			
<b>IL056-007 Scattered Site</b>	9/17/2006			9/17/2008			
<b>IL056-008 Hawlwy, millview Kuester &amp; Scattered Site</b>	9/17/2006			9/17/2008			
<b>IL056-011 Hawley Orchard</b>							
<b>II056-012 Scattered Site</b>							
<b>II056-013 Warren Manor</b>							
<b>IL056-014 Scattered Site</b>							
<b>II056-015 Scattered Site</b>							
<b>II056-016 Scattered Site</b>	9/17/2006			9/17/2008			
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement				(2) To be completed for the Performance & Evaluation Report			
Signature of the Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date			

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

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

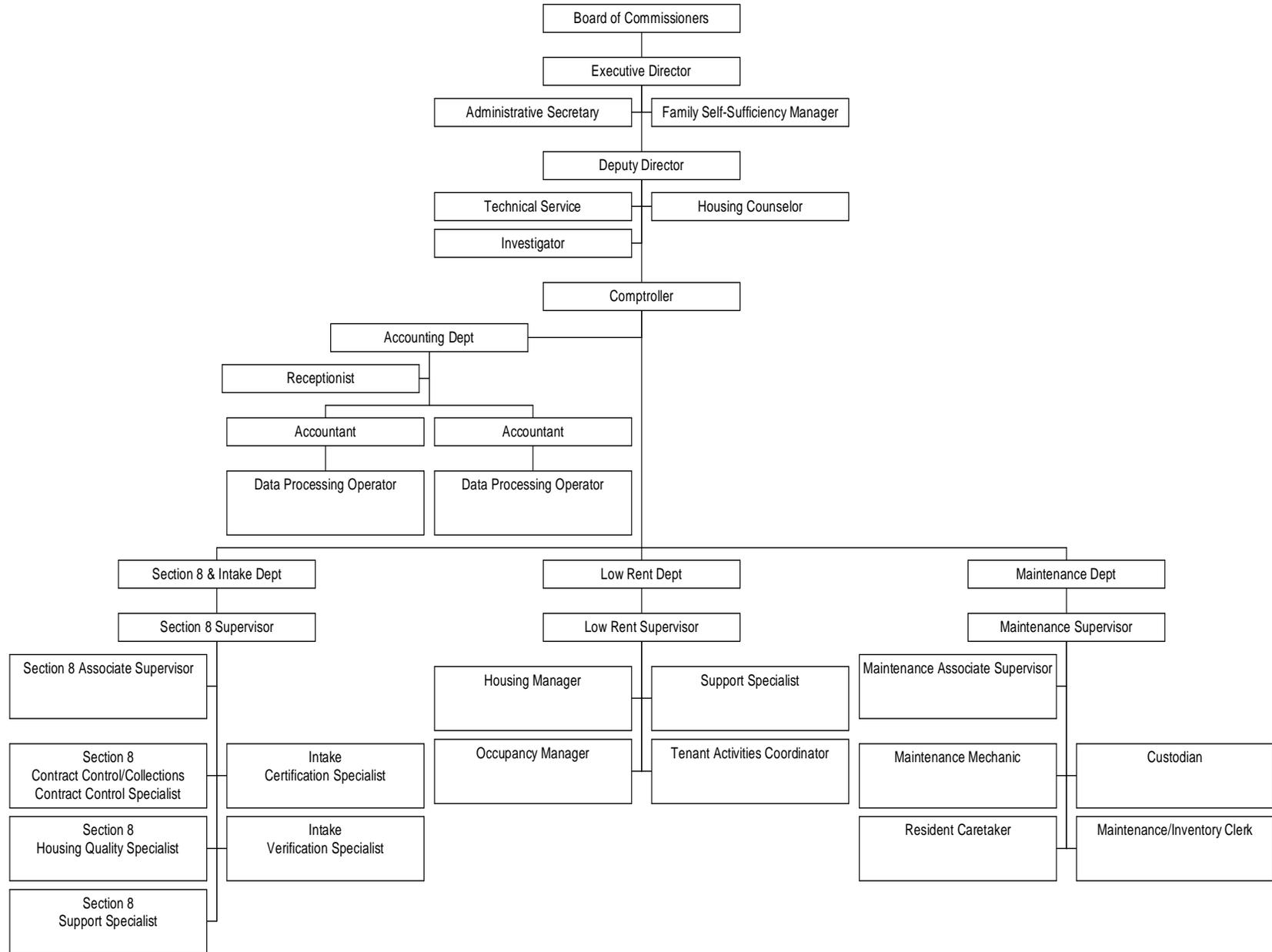
Performance & Evaluation Report for 501-04 Program Year Ending 03/31/05

OMB Approval No. 2577-0157 (Exp. 7/31/98)

Development Number/Name	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
HA Wide Activities							
IL 056-017 Scattered Site							
IL 056-018 Scattered Site							
IL056-019 Scattered Site							
IL056-020 Scattered Site							
IL056-021 Scattered Site							
IL056-022 Disabled							
HA-Wide	9/17/2006			9/17/2008			
(1) To be completed for the Performance & Evaluation Report or a Revised Annual Statement				(2) To be completed for the Performance & Evaluation Report			
Signature of the Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date			

# ATTACHMENT IL056 o05- LCHA Organizational Chart

## Lake County Housing Authority



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

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# PHA Plans

5 Year Plan for Fiscal Years 2005 - 2009  
Annual Plan for Fiscal Year 2005

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

**PHA Plan  
Agency Identification**

**PHA Name:** Housing Authority of the County of Lake

**PHA Number:** IL-056

**PHA Fiscal Year Beginning: (mm/yyyy)** 10/2005

**Public Access to Information**

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

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

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

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

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

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

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

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

**A. Mission**

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

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- The PHA's mission is:  
Lake County Housing Authority will promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.

**B. Goals**

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

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

- PHA Goal: Expand the supply of assisted housing  
Objectives:
- Apply for additional rental vouchers:
  - Reduce public housing vacancies:
  - Leverage private or other public funds to create additional housing opportunities:
  - Acquire or build units or developments
  - Other (list below)
- PHA Goal: Improve the quality of assisted housing  
Objectives:
- Improve public housing management: (PHAS score) 87
  - Improve voucher management: (SEMAP score) 100
  - Increase customer satisfaction: With all Customers.
  - Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections)
  - Renovate or modernize public housing units: As Needed
  - Demolish or dispose of obsolete public housing:

- Provide replacement public housing:
- Provide replacement vouchers:
- Other: (list below)

PHA Goal: Increase assisted housing choices

Objectives:

- Provide voucher mobility counseling:
- Conduct outreach efforts to potential voucher landlords
- Increase voucher payment standards
- Implement voucher homeownership program:
- Implement public housing or other homeownership programs:
- Implement public housing site-based waiting lists:
- Convert public housing to vouchers:
- Other: Housing Counseling, HCV FSS, and Project Base Vouchers.

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

PHA Goal: Provide an improved living environment

Objectives:

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

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

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

Objectives:

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

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

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

**Other PHA Goals and Objectives: (list below)**

**Annual PHA Plan**  
**PHA Fiscal Year 2005**  
[24 CFR Part 903.7]

**i. Annual Plan Type:**

Select which type of Annual Plan the PHA will submit.

**Standard Plan**

**Streamlined Plan:**

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

**Troubled Agency Plan**

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

[24 CFR Part 903.7 9 (r)]

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

The Housing Authority serves the jurisdiction of Lake County, Illinois which has been identified as one of the most affluent counties in the United States and the second wealthiest the Chicago metropolitan region. Very few census tracts in the County fall within the definition of "high poverty". The area is one of high homeownership with rentals accounting for only 22% of the available units. The vacancy rate among these units is 4.7%, which is low by HUD standards. The jurisdiction lies within one of the metropolitan regions where the Department has authorized agencies to establish fair market rents at the 50<sup>th</sup> percentile.

The Authority manages 620 units of conventional public housing at 145 sites. It has 332 units for elderly residents at seven sites that include walk-up, mid-rise and high-rise buildings. The remaining 286 units for families include a 125 town home development, 133 scattered site single family homes and 28 units in multi-unit buildings at seven sites. All new admissions to the program and annually all participants are given the choice between paying an income based rent or a flat rent based on FMRs. In addition the Authority owns 6 scattered site single-family homes and Midlothian Manor a 12 unit assisted living building separate from the public housing program.

The Authority is engaged in aggressive screening to determine desirability as a tenant and lease enforcement for drug related or violent criminal activity as well as the community service requirement. The agency's modernization efforts have received high marks from the Corps of Engineers and it administers a ROSS Service Coordinator initiative.

Lake County Housing Authority's Deconcentration Policy conforms to the Departments established income ranges and reviews average incomes by developments on a quarterly basis. Given the nature of the Authority's housing stock the goal of deconcentration has generally been met due to the type, size and location of its developments.

The Housing Authority provides housing assistance through the administration of 2,603 vouchers. It operates a number of special admissions programs including the Family Unification Program, Mainstream Program for persons with disabilities, Welfare to Work Program and has committed

available assistance to the Lake County Continuum of Care effort. The payment standard is established at 110% of the increased FMR for the Chicago metropolitan area. In addition, the Authority has committed to project base up to 485 vouchers at existing developments or rehabilitated and newly constructed units. Lake County Housing Authority is also a member of the Chicago region wide Metrolinks Program and contracts with a local fair housing agency to provide mobility counseling. Finally, the Authority is responsible for the ACC administration of 586 Section 8 apartments and town homes.

The Authority maintains separate waiting lists for its Low Rent and Housing Choice Voucher Programs with approximately 4,000 families on each of its waiting lists. Both programs share common preferences that include preferences for residency in Lake County, victims of domestic violence, the elderly and the disabled.

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

[24 CFR Part 903.7 9 (r)]

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

#### **Table of Contents**

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#### **Attachments**

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

Required Attachments:

- Admissions Policy for Deconcentration **ATTACHMENT IL056 a05**
- FY 2005 Capital Fund Program Annual Statement  
**ATTACHMENT IL056 i05**
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

Optional Attachments:

- PHA Management Organizational Chart
- FY 2005 Capital Fund Program 5 Year Action Plan
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text) **ATTACHMENT IL056 h05**
- Other

**ATTACHMENT IL056 j05-CFP P&E 2001**  
**ATTACHMENT IL056 k05- CFP P&E 2002**  
**ATTACHMENT IL056 l05- CFP P&E 2003**  
**ATTACHMENT IL056 m05- CFP P&E 2003-1**  
**ATTACHMENT IL056 n05- CFP P&E 2004**  
**ATTACHMENT IL056 p05- The Regional Housing Initiative**

**Supporting Documents Available for Review**

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

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: 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	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	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	Annual Plan: Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
X	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
	The most recent Public Housing Drug Elimination Program (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

## **1. Statement of Housing Needs**

[24 CFR Part 903.7 9 (a)]

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

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

<b>Housing Needs of Families in the Jurisdiction by Family Type</b>							
Family Type	Overall	Afford- ability	Supply	Quality	Access- ibility	Size	Loca- tion
Income <= 30% of AMI	4,177	5	5	3	3	3	2
Income >30% but <=50% of AMI	1,990	4	5	3	3	3	2
Income >50% but <80% of AMI	894	4	5	2	3	2	2
Elderly	8,990	5	4	3	3	1	1
Families with Disabilities	NA	NA	5	NA	4	NA	NA
White Non- Hispanic	50,923	NA	5	NA	NA	NA	NA
Black Non- Hispanic	3,385	NA	5	NA	NA	NA	NA
Hispanic	2,900	NA	5	NA	NA	NA	NA

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

- Consolidated Plan of the Jurisdiction/s  
Indicate year:
- U.S. Census data: the Comprehensive Housing Affordability Strategy (“CHAS”) dataset CHAS Table 1C- Lake County, IL 2000
- American Housing Survey data  
Indicate year:
- Other housing market study  
Indicate year:
- Other sources: (list and indicate year of information)

## **B. B1 Housing Needs of Families on the Public Housing**

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

<b>Housing Needs of Families on the Waiting List</b>
--

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	4,809		131
Extremely low income <=30% AMI	4,215	88%	
Very low income (>30% but <=50% AMI)	506	11%	
Low income (>50% but <80% AMI)	73	2%	
Families with children	3,400	71%	
Elderly families	323	7%	
Families with Disabilities	1,253	26%	
Black	2,950	61%	
Hispanic	445	9%	
White	1,355	28%	
Other	59	1%	
Characteristics by Bedroom Size (Public Housing Only)			
0BR	0	0	8
1BR	1,466	30%	58
2 BR	1,941	40%	18
3 BR	1,083	23%	42
4 BR	281	6%	5
5 BR	32	1%	0
5+ BR	6	<1%	0
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?			
<input type="checkbox"/> No <input type="checkbox"/> Yes			

## B2. Housing Needs of Families on the Section 8- Housing Choice Voucher Program Waiting Lists

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	6,036		172
Extremely low income <=30% AMI	5,285	88%	
Very low income (>30% but <=50% AMI)	644	11%	
Low income (>50% but <80% AMI)	89	1%	
Families with children	3,980	66%	
Elderly families	845	14%	
Families with Disabilities	1,463	24%	
Black	3,330	55%	
Hispanic	542	9%	
White	2,087	35%	
Other	77	1%	
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 checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?			
<input type="checkbox"/> No <input type="checkbox"/> Yes			

### C. Strategy for Addressing Needs

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

**(1) Strategies**

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

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

Select all that apply

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

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

Select all that apply

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

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

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

Select all that apply

- Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing

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

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

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

Select all that apply

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

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

**Strategy 1: Target available assistance to the elderly:**

Select all that apply

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

**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) Award a preference to a person with a disability.

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

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

Select if applicable

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

**Strategy 2: Conduct activities to affirmatively further fair housing**

Select all that apply

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

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

**(2) Reasons for Selecting Strategies**

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

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

**2. Statement of Financial Resources**

[24 CFR Part 903.7 9 (b)]

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

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2004 grants)</b>		
a) Public Housing Operating Fund	1,048,545	
b) Public Housing Capital Fund	1,188,142	
c) HOPE VI Revitalization	0	
d) HOPE VI Demolition	0	
e) Annual Contributions for Section 8 Tenant-Based Assistance	21,288,489	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	0	
g) Resident Opportunity and Self-Sufficiency Grants	0	
h) Community Development Block Grant	0	
i) HOME	0	
Other Federal Grants (list below)		
<b>Housing Counseling</b>	24,107	
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
2003	144,396.26	
2003-1	4,015.40	
2004	1,119,624.11	
<b>3. Public Housing Dwelling Rental Income</b>	1,603,180	
<b>Summer Food Program</b>	21,707	
<b>4. Other income (list below)</b>		
Roof Top Lease	32,280	
<b>Investment Income</b>	20,030	
<b>4. Non-federal sources (list below)</b>		
<b>Total resources</b>	26,464,516	

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

## **A. Public Housing**

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

### **(1) Eligibility**

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

- When families are within a certain number of being offered a unit: (state number)
- When families are within a certain time of being offered a unit: (state time)
- Other: When families reach top of the waiting list.

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 Credit History

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

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

e.  Yes  No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

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

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

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

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

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

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

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

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

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

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

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

### **(3) Assignment**

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

- One
- Two
- Three or More

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

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

### **(4) Admissions Preferences**

a. Income targeting:

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

b. Transfer policies:

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

- Emergencies
- Overhoused
- Underhoused
- Medical justification
- Administrative reasons determined by the PHA (e.g., to permit modernization work)
- Resident choice: (state circumstances below)
- Other: As reasonable accommodation or in response to hate crime.

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

- Working families and those unable to work because of age or disability
- Veterans and veterans’ families
- Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) Elderly, disabled and persons in nursing homes who could be discharged except for their inability to afford housings.

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.

## 2 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans’ families
- Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) Elderly, disabled and persons in nursing homes who could be discharged except for their inability to afford housings.

4. Relationship of preferences to income targeting requirements:

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

## **(5) Occupancy**

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

- The PHA-resident lease
- The PHA’s Admissions and (Continued) Occupancy policy
- PHA briefing seminars or written materials
- Other source: Resident orientation video and Tenant Handbook

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

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

**(6) Deconcentration and Income Mixing**

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

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

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

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

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

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

Other (list policies and developments targeted below)

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

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

- Additional affirmative marketing
- Actions to improve the marketability of certain developments
- Adoption or adjustment of ceiling rents for certain developments

- Adoption of rent incentives to encourage deconcentration of poverty and income-mixing
- Other (list below)

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

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

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

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

## **B. Section 8**

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

### **(1) Eligibility**

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

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

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:

PHA give 180-day period to search for a unit with new extensions.

**(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) Elderly, disabled and persons in nursing homes who could be discharged except for their inability to afford housings.

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.

2      Date and Time

Former Federal preferences

- 2      Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- 2      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) Elderly, disabled and persons in nursing homes who could be discharged except for their inability to afford housings.

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

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

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

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

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

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

### **(5) Special Purpose Section 8 Assistance Programs**

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

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

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

- Through published notices
- Other: Notification of non-profit organizations and municipalities.

## **4. PHA Rent Determination Policies**

[24 CFR Part 903.7 9 (d)]

### **A. Public Housing**

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

#### **(1) Income Based Rent Policies**

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

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

**See: ATTACHMENT IL056 g05**

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

1.  Yes  No: Does the PHA plan to charge rents at a fixed amount or percentage less than 30% of adjusted income?
2. If yes to above, list the amounts or percentages charged and the circumstances under which these will be used below:
- d. Which of the discretionary (optional) deductions and/or exclusions policies does the PHA plan to employ (select all that apply)
- For the earned income of a previously unemployed household member
  - For increases in earned income
  - Fixed amount (other than general rent-setting policy)  
If yes, state amount/s and circumstances below:
  - Fixed percentage (other than general rent-setting policy)  
If yes, state percentage/s and circumstances below:
  - For household heads
  - For other family members
  - For transportation expenses
  - For the non-reimbursed medical expenses of non-disabled or non-elderly families
  - Other (describe below)

e. Ceiling rents

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

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

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

- For all developments
- For all general occupancy developments (not elderly or disabled or elderly only)
- For specified general occupancy developments
- For certain parts of developments; e.g., the high-rise portion

- For certain size units; e.g., larger bedroom sizes
- Other (list below)

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

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

f. Rent re-determinations:

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

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

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

## **(2) Flat Rents**

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

- The section 8 rent reasonableness study of comparable housing
- Survey of rents listed in local newspaper
- Survey of similar unassisted units in the neighborhood
- Other: Development operating costs and FMR.

## B. Section 8 Tenant-Based Assistance

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

### (1) Payment Standards

Describe the voucher payment standards and policies.

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

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

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

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

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

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

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

- Annually
- Other (list below)

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

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

**(2) Minimum Rent**

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

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

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

**See: ATTACHMENT IL056 g05**

**5. Operations and Management**

[24 CFR Part 903.7 9 (e)]

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

**A. PHA Management Structure**

Describe the PHA’s management structure and organization.

(select one)

- An organization chart showing the PHA’s management structure and organization is attached. **IL056 o05- LCHA Organizational Chart**
- A brief description of the management structure and organization of the PHA follows:

**B. HUD Programs Under PHA Management**

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

<b>Program Name</b>	<b>Units or Families Served at Year Beginning</b>	<b>Expected Turnover</b>
Public Housing	601	130`
Section 8 Vouchers	2,550	480
Section 8 Certificates	0	0
Section 8 Mod Rehab	0	0
Special Purpose Section	0	0

8 Certificates/Vouchers (list individually)		
Public Housing Drug Elimination Program (PHDEP)	0	0
Other Federal Programs(list individually)		
Housing Counseling	98	98

### C. Management and Maintenance Policies

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

- (1) Public Housing Maintenance and Management:  
Admissions and Continued Occupancy Policy, Lease with Addenda and Riders, Rent Collection Policy, Economic Self Sufficiency and Community Service Policy, Deconcentration Policy, Pet Policy, Maintenance Charge Policy and Schedule of Charges, Grievance Procedures, Housekeeping Standards, Occupancy Policy, Maintenance Policy, Pest Eradication Policy, Preventive Maintenance Plan.
- (2) Section 8 Management: Section 8 Adm. Plan.

## **6. PHA Grievance Procedures**

[24 CFR Part 903.7 9 (f)]

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

### A. Public Housing

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

If yes, list additions to federal requirements below:

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

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

**B. Section 8 Tenant-Based Assistance**

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

If yes, list additions to federal requirements below:

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

- PHA main administrative office  
 Other (list below)

**7. Capital Improvement Needs**

[24 CFR Part 903.7 9 (g)]

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

**A. Capital Fund Activities**

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

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

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

Select one:

The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name) *See: ATTACHMENT IL056 i05*

-or-

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

## **(2) Optional 5-Year Action Plan**

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

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

b. If yes to question a, select one:

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

-or-

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

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

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

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

1. Development name:

2. Development (project) number:

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

Revitalization Plan under development

- Revitalization Plan submitted, pending approval
- Revitalization Plan approved
- Activities pursuant to an approved Revitalization Plan underway

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

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

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

## **8. Demolition and Disposition**

[24 CFR Part 903.7 9 (h)]

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

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

### 2. Activity Description

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

<b>Demolition/Disposition Activity Description</b>
1a. Development name:
1b. Development (project) number:
2. Activity type: Demolition <input type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one) Approved <input type="checkbox"/>

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

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

[24 CFR Part 903.7 9 (i)]

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

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

2. Activity Description

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

<b>Designation of Public Housing Activity Description</b>
1a. Development name:
1b. Development (project) number:
2. Designation type:
Occupancy by only the elderly <input type="checkbox"/>

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

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

[24 CFR Part 903.7 9 (j)]

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

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

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

#### 2. Activity Description

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

<b>Conversion of Public Housing Activity Description</b>	
1a. Development name:	
1b. Development (project) number:	
2. What is the status of the required assessment?	<input type="checkbox"/> Assessment underway

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

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

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

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

[24 CFR Part 903.7 9 (k)]

**A. Public Housing**

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

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

2. Activity Description

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

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

**B. Section 8 Tenant Based Assistance**

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

2. Program Description:

a. Size of Program

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

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

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

b. PHA-established eligibility criteria

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

If yes, list criteria below:

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

[24 CFR Part 903.7 9 (l)]

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

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

1. Cooperative agreements:

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

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

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

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

**B. Services and programs offered to residents and participants**

**(1) General**

a. Self-Sufficiency Policies

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

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

b. Economic and Social self-sufficiency programs

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

<b>Services and Programs</b>				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)
Elderly Service Coordinator	198	Elderly Residents	Developments	Public Housing

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

a. Participation Description

<b>Family Self Sufficiency (FSS) Participation</b>		
Program	Required Number of Participants (start of FY 2005 Estimate)	Actual Number of Participants (As of: 04/01/05)
Public Housing	0	0
Section 8	146	104

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

**C. Welfare Benefit Reductions**

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)
- Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies
  - Informing residents of new policy on admission and reexamination

- Actively notifying residents of new policy at times in addition to admission and reexamination.
- Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
- Establishing a protocol for exchange of information with all appropriate TANF agencies
- Other: (list below)

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

### **13. PHA Safety and Crime Prevention Measures**

[24 CFR Part 903.7 9 (m)]

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

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

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

(select all that apply)

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

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

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

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

3. Which developments are most affected? IL06-PO56-OO1 Marion Jones

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

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

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

2. Which developments are most affected? IL06-PO56-OO1 Marion Jones

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

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

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

2. Which developments are most affected? IL06-PO56-OO1 Marion Jones

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

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

- Yes  No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes  No: Has the PHA included the PHDEP Plan for FY 2005 in this PHA Plan?
- Yes  No: This PHDEP Plan is an Attachment. (Attachment Filename: \_\_\_\_)

#### **14. RESERVED FOR PET POLICY**

[24 CFR Part 903.7 9 (n)]

*See: ATTACHMENT IL056 b05*

#### **15. Civil Rights Certifications**

[24 CFR Part 903.7 9 (o)]

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

#### **16. Fiscal Audit**

[24 CFR Part 903.7 9 (p)]

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

#### **17. PHA Asset Management**

[24 CFR Part 903.7 9 (q)]

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

1.  Yes  No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock, including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and

other needs that have **not** been addressed elsewhere in this PHA Plan?

2. What types of asset management activities will the PHA undertake? (select all that apply)

- Not applicable
- Private management
- Development-based accounting
- Comprehensive stock assessment
- Other: (list below)

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

### **18. Other Information**

[24 CFR Part 903.7 9 (r)]

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

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

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

- Attached at Attachment (File name) **See: ATTACHMENT IL056 h05**
- Provided below:

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

- Considered comments, but determined that no changes to the PHA Plan were necessary.
- The PHA changed portions of the PHA Plan in response to comments  
List changes below:
- Other: (list below)

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

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

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

3. Description of Resident Election Process

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

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

b. Eligible candidates: (select one)

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

c. Eligible voters: (select all that apply)

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

**C. Statement of Consistency with the Consolidated Plan**

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

1. Consolidated Plan jurisdiction: County of Lake, IL
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
- The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.  
 The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.  
 The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.  
 Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)

Other: (list below)

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

**D. Other Information Required by HUD**

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

## **Attachments**

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