

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

Portage Metropolitan Housing Authority

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

Approved by PMHA Board: September 23, 2004

Approved by HUD:

**PHA Plan
Agency Identification**

PHA Name: Portage Metropolitan Housing Authority

PHA Number: OH031

PHA Fiscal Year Beginning: 01/2005

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.* The Portage Metropolitan Housing Authority is dedicated to meeting the housing needs of low-income families and individuals of Portage County by developing, managing and supporting decent affordable housing in partnership with community agencies.

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.

Portage MHA's Agency Goals and 5 Year Objectives are following the HUD goals.

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

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

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

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

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

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

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

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

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

Other PHA Goals and Objectives: (list below)

PMHA AGENCY GOALS

1. Efficiently, effectively operate agency-housing programs, while being sensitive to the needs and concerns of participants, landlords, and the community.
2. Respond to local housing needs by developing new affordable housing opportunities for low-income households and improving resource utilization.
3. Enhance the quality of life of the PMHA's residents, with particular emphasis upon promotion of family self-sufficiency.

5 YEAR OBJECTIVES

1. Efficiently, effectively operate agency housing programs, while being sensitive to the needs and concerns of participants, landlords, and the community.
 - A. Ensure efficient, effective, responsive Section 8 administration
 1. Achieve and maintain SEMAP High Performer status
 2. Maximize the effectiveness of the program for applicants and participants
 3. Maximize the efficiency of the program
 4. Recruit new landlords
 - B. Ensure efficient, effective, responsive public housing administration
 1. Maintain PHAS High Performer status
 2. Maximize the efficiency and effectiveness of housing management
 3. Maximize the efficiency of maintenance
2. Respond to local housing needs by developing new affordable housing opportunities for low-income households and improving resource utilization.

- A. Develop affordable housing using HUD and non-HUD sources
 - 1. Expand the supply of permanent, affordable housing, for the low-to moderate-income population in a variety of geographic areas.
 - 2. Preserve the inventory of privately owned permanent, affordable rental housing for the general low-income population.
 - 3. Develop affordable housing with supportive services for special needs populations.

- B. Use Public Housing and Section 8 resources to meet local identified housing needs
 - 1. Maximize Section 8 lease-up rate.
 - 2. Monitor Tenant Preference Policy to meet identified housing needs.
 - 3. Identify alternative uses for developments having marketing issues.

3. Enhance the quality of life of the PMHA's residents, with particular emphasis upon promotion of family self-sufficiency.

- A. Increase self-sufficiency rate in public housing.
 - 1. Ensure policies encourage and support family responsibility.
 - 2. Encourage on-site supportive services.
 - 3. Use housing as an incentive for self-sufficiency progress.
 - 4. Seek out and pursue appropriate grant opportunities.

- B. Increase employment rate of Section 8 and public housing families.
 - 1. Provide incentives for tenants to generate higher income.
 - 2. Provide job training and work through PMHA maintenance/construction needs.

Annual strategies are located in "Statement of Housing Needs," part C, "Strategy for Addressing Needs"

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

Note, although PMHA has prepared a Streamlined Plan, information regarding sections omitted from this Plan, including maintenance procedures, housing management procedures, grievance procedures, and resident programs, is on display in PMHA's central repository and available for public inspection.

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 Portage Metropolitan Housing Authority (PMHA) Annual Plan format is guided by two designations awarded to PMHA. The Annual Plan follows the streamlined version due to the PMHA's HUD designation as a High Performer. The Plan is also modified by PMHA's acceptance under HUD's demonstration program known as Moving to Work (MTW). The MTW agreement executed in March 1999 was to have ended March 2004. However, the agreement has been extended by HUD through December 2005. As a result, the Section 8 and Public Housing programs will continue to follow MTW guidelines through 2005. The following Annual Plan pages do not deviate from prior years in terms of policies and practices.

As the PMHA originally expected the MTW program to end during 2004, a MTW Transitional Plan was developed in the spring of 2004 that contained two parts. One part identified the MTW features that would be replaced with standard HUD procedures and stated the timing and implementation steps to be followed to make the transition. The second part summarized the MTW features that the PMHA hopes to continue through a request to HUD for waivers. The MTW Transitional Plan will be revised and submitted toward the end of 2005, unless the MTW agreement is extended beyond 2005.

The Annual Plan contains some new action steps, but does not include any new goals or objectives. The only significant changes that may take place during 2005 would be as a result of funding changes. In particular, funding reductions to the Section 8 program would require an analysis of costs, and could impact policies. It is premature to use this document to announce program changes, as there is not enough information on 2005 Congressional appropriations available to make thoughtful decisions at this time.

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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

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***Not applicable due to High Performer Status**

Attachments

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

Required Attachments:

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

Optional Attachments:

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

List of Attachments:

- A:** *Deconcentration Policy*
- B:** *2005 Capital Fund Annual Statement & Five-Year Capital Fund Plan*
- C:** *Progress in Meeting 5-Year Plan Mission and Goals*
- D:** *Resident Advisory Board Comments*
- E:** *Membership of the Resident Advisory Board*
- F:** *Resident Membership of the PHA Governing Board*
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- J:** *P&E 501.01*
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- M:** *P&E 502.03*

Supporting Documents Available for Review

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: 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;
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	Annual Plan: Eligibility, Selection, and Admissions Policies
X	2. Documentation of the required deconcentration and income mixing analysis	
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
N/A Per Moving to Work Contract	Schedule of flat rents offered at each public housing development <input type="checkbox"/> check here if included in the public housing A&O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies	Annual Plan: Rent

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	<input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	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
N/A	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
Attachment To Plan	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
N/A	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
N/A	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
N/A	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
N/A	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
N/A	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
N/A	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
X	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.	Annual Plan: Annual Audit

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	
N/A	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)
X	Moving To Work Plan	MTW Implementation Plan
X	Pet Policy for Seniors and Pet Policy for Families	Supporting Documents Binder
X	Maintenance Procedures and Tenant Charges	Annual Plan: Operations/Management
X	PMHA Descriptive Information	Supporting Documents Binder
X	Resident Program Descriptions and Partnership Agreements	Annual Plan: Self-Sufficiency
X	Resident Satisfaction Survey Follow-up Plan	Supporting Documents Binder
X	2002 Public Housing Assessment System Report	Supporting Documents Binder

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

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

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

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	4,132	5	5	5	2	3	3
Income >30% but <=50% of AMI	3,021	4	5	5	2	3	3
Income >50% but <80% of AMI	3,704	2	3	4	2	3	3
Elderly	1,875	3	3	3	2	1	3
Families with Disabilities	1,006	3	3	4	4	2	4
Black non-Hispanic	733	4	5	5	2	3	3
Hispanic	95	4	5	5	2	3	3
Race/Ethnicity	N/A	N/A	N/A	N/A	N/A	N/A	N/A

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

- Consolidated Plan of the Jurisdiction/s
Indicate year:
- U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources:

Portage County Comprehensive Housing Strategies, CHAS Table 1C for Portage County and Portage County Regional Planning Commission interpolation of 1990 Census data, adjusted per Community 2020 Projections for 2002

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input checked="" type="checkbox"/>	Section 8 tenant-based assistance		
<input type="checkbox"/>	Public Housing		
<input type="checkbox"/>	Combined Section 8 and Public Housing		
<input type="checkbox"/>	Public Housing Site-Based or sub-jurisdictional waiting list (optional)		
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover #Notified 08/03-07/04
Waiting list total	2,415		726 notified
Extremely low income <=30% AMI	2,054	85.1%	
Very low income (>30% but <=50% AMI)	340	14.1%	
Low income (>50% but <80% AMI)	21	0.8%	
Families with children	1,222	50.1%	
Elderly families	208	8.6%	
Families with Disabilities	589	24.4%	
White	1,669	69.1%	
African American	677	28.0%	
Hispanic	14	0.6%	
Asian/Pacific Islander	6	0.3%	
American Indian	10	0.4%	
Other	39	1.6%	

Housing Needs of Families on the Waiting List

Is the waiting list closed (select one)? No Yes
 If yes:
 How long has it been closed (# of months)? (since 05/15/04)
 Does the PHA expect to reopen the list in the PHA Plan year? No Yes
 Does the PHA permit specific categories of families onto the waiting list, even if generally closed?
 No Yes

Housing Needs of Families on the Waiting List

Waiting list type: (select one)
 Section 8 tenant-based assistance
 Public Housing
 Combined Section 8 and Public Housing
 Public Housing Site-Based or sub-jurisdictional waiting list (optional)
 If used, identify which development/subjurisdiction:

	# of families	% of total families	Annual Turnover # Notified 08/03-07/04
Waiting list total	1,942		682 notified
Extremely low income <=30% AMI	1,681	89.3%	
Very low income (>30% but <=50% AMI)	233	10.4%	
Low income (>50% but <80% AMI)	28	0.3%	
Families with children	1,751	90.2%	
Elderly families	150	7.7%	
Families with Disabilities	305	15.7%	
White	1,380	73.5%	
African American	496	21.5%	
Hispanic	17	1.2%	
Asian/Pacific Islander	3	0.4%	
American Indian	9	0.7%	
Other	37	2.7%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	191	9.8%	144
2 BR	1148	59.1%	310
3 BR	548	28.2%	205
4 BR	48	2.5%	23
5 BR	6	0.3	NA
5+ BR	1	0.1	NA

Is the waiting list closed (select one)? No Yes
 If yes:
 How long has it been closed (# of months)?
 Does the PHA expect to reopen the list in the PHA Plan year? No Yes
 Does the PHA permit specific categories of families onto the waiting list, even if generally closed?
 No Yes

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.

YEAR 2005 STRATEGY

1. Efficiently, effectively operate agency housing programs, while being sensitive to the needs and concerns of participants, landlords, and the community.
 - A. Ensure efficient, effective, responsive Section 8 administration
 1. Achieve SEMAP High Performer status
 - a. Refine internal compliance reviews
 2. Maximize the effectiveness of the program for applicants and participants
 - a. Enhance interim reporting requirement and processing procedures for zero-income participants
 - b. Reduce number of households reporting zero-income
 - c. Expand number of participants in MTW homeownership program
 - d. Expand services offered to homeownership participants through ROSS grant
 - e. Increase activity and effectiveness of FSS Coordinating Committee
 - f. Increase tenant comment efforts (especially related to expiration of MTW agreement and transition plan)
 3. Maximize efficiency of the program
 - a. Promote ongoing training for staff on Visual MCS and Microsoft Office Systems
 - b. Increase staff development efforts through periodic in-service meetings
 - c. Streamline workload distribution system to promote greater specialization among staff
 - d. Improve existing computerized rent calculator
 - e. Increase utilization of computerized rent calculator, following enhancements
 - f. Improve communication between Section 8 and Finance departments
 - g. Seek guidance on methods of enhancing teamwork within the department
 - h. Upgrade monthly HAP processing procedures
 4. Continue recruitment of new landlords
 - a. Develop new tool for marketing available Section 8 units
 - b. Increase landlord outreach efforts (especially related to expiration of MTW agreement and transition plan)
 - B. Ensure efficient, effective, responsive Public Housing administration
 1. Maintain PHAS High Performer status
 - a. Maximize communications between Public Housing and maintenance departments regarding inspections and vacancies of multi-family sites to address PHAS and preventative needs as soon as identified

2. Maximize the efficiency and effectiveness of housing management
 - a. Continue to improve efforts to relocate sole remaining family members who are overhoused
 - b. Target zero-income participants for integrity checks and referrals
 - c. Develop and implement standard housekeeping policy
 - d. Examine need for vehicle registration system and database
 - e. Improve tenant screening by utilizing more resources, such as NCIC records and internet resources
 - f. Continue to refine collection of occupancy related charges other than rent
 - g. Continue to refine collection of balances owed by vacated tenants through greater outreach and other methods
 - h. Examine the feasibility to file small claim court cases for judgments for minor debts
 - i. Continue to refine the implementation of the community service requirement
 - j. Assess and address staff training needs
 - k. Incorporate staff training into weekly staff meetings
 - l. Revise and update policies that require change due to ending of MTW status

3. Maximize the efficiency of maintenance
 - a. Develop and implement Preventative Maintenance Programs for all building mechanicals at every site
 - b. Improve purchasing process through bulk cost comparisons and use of the bar-coding system
 - c. Better standardize the major appliances and fixtures at all sites
 - d. Continue to improve customer service
 - e. Maintain high performance status for vacancy turnovers
 - f. Expand ability to provide maintenance services to other government and non-profit owners of rental properties
 - g. Expand and encourage educational opportunities for maintenance field workers

2. Respond to local housing needs by developing new affordable housing opportunities for low-income households and improving resource utilization.
 - A. Develop affordable housing using HUD and non-HUD sources
 1. Expand the supply of permanent, affordable housing, for the low-to-moderate income population in a variety of geographic areas.
 - a. Analyze opportunities for acquisition or new construction that come to the attention of PMHA
 - b. Keep up-to-date on financing resources, particularly loans/grants offered by Ohio Dept. of Development and Low-Income Tax Credit Program

 2. Preserve the inventory of permanent, affordable rental housing for the general low-income population
 - a. Monitor HUD contracts with private owners that are expiring, and keep in contact with owners about future plans
 - b. Administer new Section 8 vouchers received to support private project-based subsidized properties having pre-paid HUD mortgages

 3. Support the development of affordable housing for specific populations.
 - a. Seek out and/or support opportunities to assist in the development of affordable housing opportunities for the disabled population.
 - b. Seek out and/or support opportunities to assist in the development of affordable housing opportunities for the homeless population

- B.** Use Public Housing and Section 8 resources to meet identified housing needs
 - 1. Monitor Tenant Preference Policy to meet identified housing needs
 - a. Work with local social service agencies to refine tenant selection preferences to meet local needs as well as maximizing utilization of resources
 - b. If the number of Section 8 units is decreased, seek input from the public, including social service agencies, suggesting ways to reduce program costs and allocate program resources.
 - 2. Identify alternative uses for developments having marketing issues
 - a. Continue to monitor vacancy rates and alternatives for Etna House
 - 3. Use Section 8 resources to assist housing owned by non-profits
 - a. If Section 8 resources permit, and provided that the Moving To Work features are available, continue to market Section 8 project-based program for non-profit owners serving special needs clients.
 - b. At the end of the Moving To Work program, seek HUD approval to continue the MTW feature that permits the acceptance of proposals from non-profit owners wishing to house special needs populations or potential homeowners.

- 3. Enhance the quality of life of the PMHA's residents, with particular emphasis upon promotion of family self-sufficiency.
 - A.** Increase self-sufficiency rate in public housing
 - 1. Ensure policies encourage family responsibility
 - a. Refine tracking method for HUD's Community Service Requirement
 - 2. Encourage on-site supportive services
 - a. Continue to support non-profit partners providing supportive services to public housing residents, as long as it is financially feasible
 - 3. Use housing as an incentive for self-sufficiency progress
 - a. Coordinate with Neighborhood Development Services and Neighbor Works to expand the Section 8 homeownership program
 - b. Provide office space to PATH, Maplewood Career Center, and other local agencies offering resident self-sufficiency services or activities in return for usage of space if funding permits
 - 4. Seek out and pursue appropriate grant opportunities
 - a. Seek funding for self-sufficiency activities for PMHA participants
 - b. Seek new partnerships with local agencies agreeing to offer services to PMHA participants
 - c. Seek out grants for playground equipment at multi-family sites

 - B.** Increase employment rate of Section 8 and public housing families.
 - 1. Provide incentives for tenants to generate higher income
 - a. Continue to analyze public housing rent policy in conjunction with MTW
 - b. Scrutinize and monitor households reporting zero income

 - 1. Provide on-the-job work opportunities that address PMHA maintenance/construction needs
 - a. Continue the maintenance/construction job training program and seek more outside work in order to reduce the reliance upon grant funding
 - b. Expand number of participants utilizing the NetWork Force Program

(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) **Pursue opportunities to preserve existing, privately-owned subsidized housing**

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)
- X Conduct outreach to expand elderly waiting list**

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

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

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

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

Select if applicable

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

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

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

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

(2) Reasons for Selecting Strategies

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

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

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

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

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2003 grants)		
a) Public Housing Operating Fund	\$588,260	
b) Public Housing Capital Fund	56,000	
c) HOPE VI Revitalization	0	
d) HOPE VI Demolition	0	
e) Annual Contributions for Section 8 Tenant-Based Assistance	5,818,136	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	0	
g) Resident Opportunity and Self-Sufficiency Grants	83,333	FY 2005
h) Community Development Block Grant	0	
i) HOME	0	
Other Federal Grants (list below)		
Section 8 Moderate Rehab	1,359,084	Rental assistance
Section 8 FSS Coordinator	34,155	Service referral
2. Prior Year Federal grants (unobligated funds only) (list below)		
Capital Fund 501-03	27,027	Capital improvements
502-03	30,920	
501-04	389,391	
3. Public Housing Dwelling Rental Income		
Public housing excess utilities	9,000	PH operations
4. Other income (list below)		

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
Laundry income	4,000	PH operations
Investment income	75,000	PH & Sec. 8 operations
4. Non-federal sources (list below)		
Commercial rental income	17,600	Supports learning center
Kent rental properties	168,275	Property operations
Total resources	\$9,270,181	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.7 9 (c)]

A. Public Housing

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

(1) Eligibility

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

- When families are within a certain number of being offered a unit: (20-30 households)
- When families are within a certain time of being offered a unit: (30-60 days)
- Other: (describe)

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

- Criminal or Drug-related activity
- Rental history (landlord references; court records)
- Housekeeping
- Other (**credit check**)

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?

None

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: (relocate to be closer to work, school and/or day care)
 Other: (list below)

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

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

Other preference(s) (list below)

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

1 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

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

4. Relationship of preferences to income targeting requirements:

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

(5) Occupancy

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

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

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 (no information is shared)

(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: **Applicant must show proof of an active search in the form of a completed landlord contact sheet.**

(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 preferences

1. Homeless referrals- families and individuals (consistent with HUD's occupancy priorities for single individuals) referred from Portage County shelters or transitional housing programs providing written confirmation that they will be receiving follow-up supportive services from the referral agency. Agencies will be limited to two referrals per month.
2. Disabled referrals- mentally and physically disabled individuals and families referred by a Portage County social service agency providing written confirmation that they will be receiving follow-up housing and supportive services from the referral agency. Agencies will be limited to two referrals per month.
3. Landlord referral of in-place families suffering recent financial setback Families referred by their current landlord because the family has recently lost employment, and intend to staying place. This preference will only be implemented if the PMHA's Section 8 lease-up rate is 97% or below. Each participating landlord will be restricted to a maximum of two referrals per year.

In addition, applicants whose names have come to the top of the waiting list, but must postpone acceptance of Section 8 assistance, may be placed back at the top of the waiting list at a later date. This preference is intended to avoid penalizing tenants, who are residing in housing having a rental lease or program component with a specific time limit or expiration date, whose names have risen to the top of the Section 8 waiting list. Frequently, tenants under these circumstances, are not able to utilize the Section 8 subsidy at the time their name appears at the top of the waiting list due to the time commitments they are required to comply with. In order to discourage affected tenants to prematurely terminate their existing housing commitments, if after notification, the applicants wish to postpone the acceptance of the Section 8 subsidy, they may do so. These tenants would then be given the next available Section 8 subsidy upon completion of their housing commitment. These applicants include those tenants:

- a. Residing in Section 8 Moderate Rehab units who have resided there for less than one year
- b. Residing in group homes or similar supportive, congregate housing and are less than 6 months from being able to live independently
- c. Residing at a supportive services public housing site who have not fulfilled the terms of their family development plan and wish to remain on site until the completion of their plan
- d. Tenants verifying that they are bound by the terms of an existing rental lease until a specific

expiration date that is less than 6 months from the date their name appeared at the top of the waiting list

All other Section 8 waiting list households would be ranked by order of date of application, with preference given to the following:

Local residency - Local residents are those who:

- a. live in Portage County, or
- b. are employed in Portage County or are notified that they are hired to work in Portage County

Applicants having only the local residency preference will be selected based on a first-come, first-served basis. Those without any preference will fall after all applicants having the local residency preference. They will also be placed in first-come, first served order, based on date of application.

Ten percent (10%) of each group of applicants selected/notified from the waiting list will be applicants designated as "Other Single".

Ten percent (10%) of each group of applicants selected/notified from the waiting list will be applicants who are out-of-county residents. Out of county residents are those who do not live or work in Portage County.

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

1 Date and Time

Former Federal preferences

- 1 Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
Victims of domestic violence
Substandard housing
- 1 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 preferences:
 - X Disabled
 - X Households without children up to 10% of each notification round

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

N/A The PMHA does not administer Special Purpose Section 8

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

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

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

- Through published notices
- Other (list below)

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

3. If yes to question 2, list these policies below: ***Reviewed on a case by case basis through the grievance procedures; however, N/A due to \$0 minimum rent.***

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: ***As part of the Moving To Work demonstration, PMHA uses ceiling rents.***

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:

\$500 deduction for full-time employment and/or full time education per the MTW contract

- 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: Overtime and bonus income are excluded as well as interest from bank assets per MTW contract.

e. Ceiling rents

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

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

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

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

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

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

f. Rent re-determinations:

1. Between income reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply)
- Never
 - At family option
 - Any time the family experiences an income increase
 - Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold)_____
 - Other (list below) **The PMHA will process a rent adjustment when decreases in income last longer than 30 days.**
- 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 *N/A per Moving to Work contract*

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: **Note: The PMHA may consider adopting a minimum rent during 2005, depending upon Section 8 funding levels, which have yet to be determined.**

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)

Portage MHA is a high-performing PHA

A. PHA Management Structure

Describe the PHA's management structure and organization.

(select one)

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

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

B. HUD Programs Under PHA Management

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

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing		
Section 8 Vouchers		
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers (list individually)		
Public Housing Drug Elimination Program (PHDEP)		
Other Federal Programs(list individually)		

C. Management and Maintenance Policies

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

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

(2) Section 8 Management: (list below)

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.

Portage MHA is a high performing PHA

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 B**

-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 B**
- 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.)

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

<input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: b. Projected end date of activity:

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

[24 CFR Part 903.7 9 (i)]

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

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

2. Activity Description

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

Designation of Public Housing Activity Description
1a. Development name: 1b. Development (project) number:
2. Designation type: Occupancy by only the elderly <input type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA’s Designation Plan <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <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.

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

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

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

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.)

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

B. Section 8 Tenant Based Assistance

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

2. Program Description: **PMHA has a Section 8 homeownership program under MTW.**

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.

Portage MHA is a high performing PHA

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

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

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

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

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

- Joint administration of other demonstration program
- Other (describe)

B. Services and programs offered to residents and participants

(1) General

a. Self-Sufficiency Policies

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

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

b. Economic and Social self-sufficiency programs

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

Services and Programs				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other	Access (development office/ PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)

(2) Family Self Sufficiency program/s

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2000 Estimate)	Actual Number of Participants (As of: DD/MM/YY)
Public Housing		
Section 8		

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

C. Welfare Benefit Reductions

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

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

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.7 9 (m)]

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

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 use 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?

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 Capital improvements to enhance security

2. Which developments are most affected?

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?

D. Additional information as required by PHDEP/PHDEP Plan

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

- 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 2004 in this PHA Plan?
- Yes No: This PHDEP Plan is an Attachment.
(Attachment Filename: N/A)

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

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.

Portage MHA is a high performing PHA

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

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

1. Yes No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
- Attached at **Attachment D**
- 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: **City of Kent, Ohio**

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)
 1. **Portage MHA will continue to provide transitional housing at Renaissance Place**
 2. **Expand use of Section 8 assistance to persons with disabilities**
 3. **Continue to provide development assistance to agencies serving persons with disabilities**
 4. **Continue to provide Section 8 assistance to large family households**
 5. **Through MTW, continue homeownership program**
- Other: Consolidated Plan jurisdiction: **Portage County, Ohio-State of Ohio**

4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: *On-going communication, active involvement in the Portage County Housing Services Council, provision of demographic information, provision of CDBG funds for fair housing activities and CDBG funding for social agencies partnering with PMHA at public housing developments*

5. 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)
 - Portage MHA will continue to provide transitional housing at Renaissance Place*
 - Expand use of Section 8 assistance to persons with disabilities*
 - Continue to provide development assistance to agencies serving persons with disabilities*
 - Continue to provide Section 8 assistance to large family households*
 - Through Portage HOPES, continue homeownership program for Public Housing tenants*
 - Market Section 8 program to attract new landlords and expand housing choice*

6. The consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: **See number 4 above**

D. Other Information Required by HUD

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

19. Definition of "Substantial Deviation" and "Significant Amendment or Modification"

24 CFR Part 903.79 (r)

Significant amendments or significant modifications to the 5 Year or Annual Plan will be subject to the requirements pertaining to input of the Participant Advisory Committee, Consolidated Plan consistency, and public comment process. "Significant amendments" or "significant modifications" are defined as discretionary changes that:

- a) Fundamentally change the PMHA's mission statement, goals or objectives, or
- b) Fundamentally change PMHA plans or policies in a manner that is inconsistent with the existing mission, goals or objectives, and require formal approval of the Board of Commissioners.

Attachments

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

- A. *Deconcentration Policy***
- B. *2005 Capital Fund Annual Statement & Five-Year Capital Fund Plan***
- C. *Progress in Meeting 5-Year Plan Mission and Goals***
- D. *Resident Advisory Board Comments***
- E. *Membership of the Resident Advisory Board***
- F. *Resident Membership of the PHA Governing Board***
- H. *Voluntary Conversion Initial Assessment***
- I. *Policy: Decreases in Income and Rent Adjustment***
- J. *P&E 501.01***
- K. *P&E 501.02***
- L. *P&E 501.03***
- M. *P&E 502.03***

Attachment A Year 2004 Income Deconcentration Analysis

Under the provisions of the Quality Housing and Work Responsibility Act, housing authorities must analyze their public housing for concentrations of poverty in their developments. The following summarizes the results and methodology of PMHA's analysis, using data from September 2004.

Moving To Work Exclusions

The PMHA's Moving To Work program has two objectives that impact upon the income deconcentration goal of the QHWRA. The two MTW objectives that impact the deconcentration goal include the objectives that call for: a) provision of self-sufficiency supportive services on site at two public housing locations and b) the use of housing with more amenities as an incentive for self-sufficiency.

The first objective involves the provision of services coordinated by PATH at Community Estates and Renaissance Place. The MTW waivers incorporate the PATH program requirement that new admissions under the PATH program at these two sites be restricted to the homeless. Consequently, the in-coming PATH participants are coming from an unstable situation, and frequently, their incomes are lower. Thus, it would be expected that newly admitted tenants at these two developments would have income relatively lower than the incomes for tenants occupying the other PMHA developments.

Secondly, the objective involving the use of more desirable housing as an incentive, involves the deliberate designation of scattered site units for those tenants having higher incomes. In order to reward families' progress toward economic self-sufficiency, the scattered site units are reserved for those families meeting certain criteria, which include meeting a required minimum income level. Thus, over time, as this feature is implemented, the scattered site projects will reflect a higher income level.

Therefore, based on the MTW waivers granted to the PMHA for supportive services and transfers to scattered sites, the following projects will not be covered by the PMHA's annual deconcentration analysis in the future:

31-01 Community Estates	31-02 Scattered site - Rehab
31-15 Renaissance Place	31-10 Scattered site - New construction

Analysis

Two methods were utilized in this analysis of the incomes of residents at the four subject developments:

31-01 Athena Gardens	31-03 Harvest Woods
31-05 Town Square Villas	31-09 Heritage Knolls

The first analysis involved assigning each family to one of three income categories: extremely low-income, very low-income, and low-income. As can be

seen on the following table, the majority (74%) of units at these developments fall within the extremely low-income category:

Table I
Income Distribution at Multi-Family Sites
Based on July 2004 Data

Total # of occupied units-111	Extremely Low-Income		Very Low-Income		Low Income		Over Income	
	# Units	Percent	# Units	Percent	#Units	Percent	#	%
Athena Gardens	16	64%	7	28%	2	8%	0	
Harvest Woods	22	81%	4	15%	1	4%	0	
Town Square	22	73%	6	20%	2	7%	0	
Heritage Knolls	22	76%	2	7%	3	10%	2	7%
Total 2004	82	74%	19	17%	8	7%	2	2%
<i>Total 2003 (111 units)</i>	<i>79</i>	<i>71%</i>	<i>25</i>	<i>23%</i>	<i>6</i>	<i>5%</i>	<i>1</i>	<i>1%</i>

Definition of Income Ranges

Family Size	Extremely Low Income (below 30% median)	Very Low Income (31%-50% median)	Low Income (51%-80% of median)
	(\$)	(\$)	(\$)
1	12,650	21,100	33,750
2	14,450	24,100	38,600
3	16,300	27,150	43,400
4	18,100	30,150	48,250
5	19,550	32,550	52,100
6	21,000	34,950	55,950

Based on 2000 data, 93% of units at these developments fell within the Extremely Low-Income range compared to 64% in 2001; 66% in 2002; 71% in 2003; and 74% in 2004.

The 2004 data demonstrates a decrease in the Very Low-Income range from 34 households in 2001 to 27 in 2002, 25 in 2003 and 19 in 2004. There were zero households falling within this category in 2000.

The number of households falling in the Low-Income range has steadily increased between 2000 and 2002. In 2000, there were 3 families in this category compared to 7 in 2001 and 10 in April 2002. However, the number decreased to 6 families in 2003, while 2004 showed a gain of 2 families, or a total of 8.

A second method of comparison consisted of calculating the average income for each development and then comparing each to the average income for all four developments. The average income for all four (\$11,524) served as the basis for the Established Income Range. Each average income per development falls within the Established Income Range (85%-115% of the average income for all noted developments). Average incomes are as follows:

2004 Established Income Range

Average income for all sites: \$11,524

<i>Site:</i>	<i>Average Income</i>	<i>Percent of Average</i>
Heritage Knolls	\$12,225	106%
Townsquare Villas	\$10,326	90%
Harvest Drive	\$10,631	92%
Athena Drive	\$13,112	114%

Conclusion

The PMHA developments fall within the Established Income Range of Average Income - \$11,524 based on 2004 data. Therefore, the staff recommends that no revisions be made to the public housing admissions policy at this time.

Component 3, (6) Deconcentration and Income Mixing

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

b. Yes No: Do any of these covered developments have average incomes above or below 85% to 15% of the average incomes of all such developments? If no, this section is complete.

If yes, list these developments as follows:

Deconcentration Policy for Covered Developments				
Development Name:	Number of Units	Explanation (if any) [see step 4 at 903.2(c) (1)(iv)]		Deconcentration policy (if no explanation) [see step 5 at 903.29c)(1)(v)]

Capital Fund Program Five-Year Action Plan
Part I: Summary

HA Name:						<input checked="" type="checkbox"/> Original	<input type="checkbox"/> Revision No: _____
Portage Metropolitan Housing Authority							
Development Nmbcr/Name/Ha-Wide	Year 1 FFY: 2005	Work Statement for Year 2 FFY Grant: 2006 PHA 2006	Work Statement for Year 3 FFY Grant: 2007 PHA 2007	Work Statement for Year 4 FFY Grant: 2008 PHA 2008	Work Statement for year 5 FFY Grant: 2009 PHA 2009		
OH31-01 Athena Gardens		74,000.00	0.00	35,000.00	32,000.00		
OH31-01 Community Estates		88,000.00	0.00	51,000.00	15,000.00		
OH31-02 Scattered Sites		0.00	124,300.00	172,000.00	18,000.00		
OH31-03 Ravenna Woods		89,000.00	0.00	0.00	45,000.00		
OH31-04 Eastowne Manor		0.00	5,000.00	5,000.00	0.00		
OH31-05 Town Square Villas	See	80,000.00	22,000.00	8,000.00	98,000.00		
OH31-06 Etna House		0.00	4,500.00	7,712.00	25,000.00		
OH31-09 Heritage Knolls	Annual	0.00	109,000.00	0.00	0.00		
OH31-10 Ravenna Scattered		0.00	26,031.00	0.00	0.00		
OH31-11 Washington Group	Statement	0.00	0.00	0.00	0.00		
OH31-15 Acquisition Rehab		10,500.00	15,000.00	0.00	85,000.00		
		341,500.00	305,831.00	278,712.00	318,000.00		
PHA Wide-Operations		43,594.00	44,816.00	62,651.00	30,119.00		
PHA Wide-Management		84,361.00	87,808.00	114,913.00	118,157.00		
PHA Wide-Administrative		54,161.00	54,161.00	54,161.00	54,161.00		
Audit		2,500.00	2,500.00	3,000.00	3,000.00		
Fees & Costs		1,000.00	1,000.00	1,000.00	1,000.00		
Non-Dwelling Equipment		14,500.00	45,500.00	27,179.00	17,179.00		
CFP Funds for 5-year Plan		541,616.00	541,616.00	541,616.00	541,616.00		

Capital Fund Program F

Part I: Summary

PHA Name		Original 5-Year Plan Revision No:			
Development Number/Name/HA- Wide	Year 1 2005	Work Statement for Year 2 FFY Grant:2005 PHA FY:2006	Work Statement for Year 3 FFY Grant:2005 PHA FY:2007	Work Statement for Year 4 FFY Grant:2005 PHA FY:2008	Work Statement for Year 5 FFY Grant:2005 PHA FY:2009
	Annual Statement				
PHA Wide - Operations		43,594.00	44,816.00	62,651.00	30,119.00
PHA Wide - Management		84,361.00	87,808.00	114,913.00	118,157.00
PHA Wide - Administration		54,161.00	54,161.00	54,161.00	54,161.00
Audit		2,500.00	2,500.00	3,000.00	3,000.00
Fees & Cost		1,000.00	1,000.00	1,000.00	1,000.00
Nondwelling Equipment					
Computers			4,500.00	22,000.00	
Office Equip/Furniture				5,179.00	12,500.00
Snow Blowers		3,500.00			
Floor Scrubber		3,200.00			4,679.00
Mowers			16,000.00		
Maintenance Vehicle			25,000.00		
Power Lift Tailgate		5,000.00			
Key Stamper		1,000.00			
Key Duplicator		1,800.00			
CFP Funds Listed for 5-year planning					
Replacement Housing Factor Funds					

Capital Fund Program Tables

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages- Work Activities

Activities for Year 1 2005	Activities for year: 2 FFY Grant: 2006 PHA FY: 2006			Activities for Year: 3 FFY Grant: 2007 PHA FY: 2007			
	Development Number/Name	Major Work Categories	Estimated Cost	Development Number/Name	Major Wor Categories	Estimated Cost	
See Annual Statement	OH31-01 Athena Gardens	Kitchen/Bath Cabinets Counter tops/sinks/faucets Cold Air Returns	74,000.00	OH31-02 Scattered Sites 820 - 822 Mechanic Street	Repl interior & exterior doors Kitchen cabinets/Bath Counter tops/sinks/faucets Replace Furnaces	18,000.00	
	OH31-01 Community Estates	Kitchen/Bath Cabinets Counter tops/sinks/faucets Cold Air Returns	88,000.00	227 Walnut Street	Replace Windows Replace Interior Doors Replace Exterior Doors	78,000.00	
	OH31-02 Scattered Sites		0.00	514 Harris Street	Kitchen cabinets/Bath Counter tops/sinks/faucets Tub surround/kit/bath flooring Repl interior & exterior doors	11,000.00	
	OH31-03 Ravenna Woods	Kitchen/Bath Cabinets Counter tops/sinks/faucets Replace Appliances	89,000.00	1066 Williams Street	Kitchen cabinets/Bath Counter tops/sinks/faucets Repl interior & exterior doors	7,800.00	
	OH31-04 Eastowne Manor			301 Ohio Avenue	Kitchen cabinets/Bath Counter tops/sinks/faucets Repl windows dining rm and basement Repl exterior doors	9,500.00	
	OH31-05 Town Square Villas	Kitchen/Bath/lights Cabinets Counter tops/sinks/faucets Shed Doors/Thresholds	80,000.00	OH31-03 Ravenna Woods			
	OH31-06 Etna House			OH31-04 Eastowne Manor	Front Doorw/keyless Entry	5,000.00	
	OH31-09 Heritage Knolls			OH21-05 Town Square Villas	Replace Retaining Wall	22,000.00	
	OH31-10 Ravenna Single Homes		0.00	OH31=06 Etna House OH31-09 Heritage Knolls	Exterior Doors Kitchen/Bath Cabinets Countertops/sinks/faucets Shed Doors/Thresholds	4,500.00 109,000.00	
	OH31-11 Washington Group Home			OH31-10 Ravenna Single Homes	Bath vanity/sink/faucet cabinets and tubs	26,031.00	
	OH31-15 Acquisition Rehab. Shalersville homes Shalersville homes Shalersville homes	Repl Wells Install Water Softeners	10,500.00	OH31-11 Washington Group Home OH31-15 Acquisition Rehab. Renaissance Place	Complete Retention Pond	15,000.00	
	Subtotal of Estimated Cost			341,500.00	Subtotal of Estimated Cost		287,831.00

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages- Work Activities

Activities for Year 1	Activities for year: 4 FFY Grant:2008 PHA FY:2008			Activities for Year: 5 FFY Grant:2009 PHA FY:2009		
2005	Development Number/Name	Major Wrok Category	Estimated Cost	Development Number/Name	Major Work Category	Estimated Cost
See Annual Statement	OH31-1 Athena Gardens	Repl bath tubs & fixtures	35,000.00	OH31-1 Athena Gardens	Concrete Sidewalks & Slabs	32,000.00
	OH31-01 Community Estates	Repl bath tubs & fixtures Underground Electric	39,000.00 12,000.00	OH31-01 Community Estates	Privacy Fences Concrete Sidewalks & Slabs	15,000.00
	OH31-02 Scattered Sites	Repl carpet Repl roofs, gutters, downs and Drainage	110,000.00	OH31-02 Scattered Sites	Hardwire Smoke Detectors	18,000.00
	222, 226, & 228 W. Elm Street	Repl tubs/surrounds/ vanities, sinks, & fixtures	8,000.00	OH31-03 Ravenna Woods	Concrete work Repl Trash enclosures Repl doors & thresholds Replace carpet & tile Replace utility doors	45,000.00
	4325, 4327, 4333, & 4339 Marks Avenue	Repl Kitchen cabinets sinks, countertops, and fixtures Repl tubs, surrounds vanities, sinks, and fixtures Repl sidewalks	22,000.00	OH31-04 Eastowne Manor	Concrete Work Handicapped Showers and Commodes Replace Carpet Appliances	98,000.00
	213 S. Willow Street	Rehab Both Units	32,000.00	OH31-05 Town Square Villas		
				OH31-06 Etna House	Replace Carpet & Tile Appliances	25,000.00
	OH31-03 Ravenna Woods			OH31-10 Ravenna Single Homes		
	OH31-04 Eastowne Manor	Trash Compactor	5,000.00	OH31-11 Washington Group Home		
	OH31-05 Town Square Villas	Security Lilghting	8,000.00	OH31-15 Renaissance Place and Acquisition Rehab	Replace Windows Replace Windows	85,000.00
	OH31-06 Etna House	Handrails for Both Floors	7,712.00			
	OH31-09 Heritage Knolls					
	OH31-10 Ravenna Single Homes					
	OH31-11 Washington Group Home					
	OH31-15 Acquisition Rehab.					
		Total for Non-Dwelling Equipment:		0.00	Total for Non-Dwelling Equipment:	
	Total CFP Estimated Cost		278,712.00	Total CFP Estimated Cost		318,000.00

Five-Year Action Plan
Part III: Supporting Pages

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

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

Capital Funding Program (CFP)

Work Statement for Year 1 FFY: 2005	Work Statement for Year: 2 FFY: 2006			Work Statement for Year: 3 FFY: 2007		
	General Description of Major Work Categories	Quantity	Estimated Cost	General Description of Major Work Categories	Quantity	Estimated Cost
See Annual Statement	Operations		43,594.00	Operations		44,816.00
	Resident Security		5,500.00	Resident Security		6,000.00
	Develop Resident Jobs Training Program and Business Development Program		39,140.00	Develop Resident Jobs Training Program and Business Development Program		40,895.00
	Coordinator of Social Service for Drug Elimination		39,721.00	Coordinator of Social Service for Drug Elimination		40,913.00
	Administration Salaries		37,000.00	Administration Salaries		37,000.00
	Administration Fringes		15,961.00	Administration Fringes		15,961.00
	Advertising		1,200.00	Advertising		1,200.00
	Audit		2,500.00	Audit		3,000.00
	Fees & Costs		1,000.00	Fees & Costs		1,000.00
	Nondwelling Equipment		14,500.00	Nondwelling Equipment		45,000.00
	Subtotal of Estimated Cost		200,116.00	Subtotal of Estimated Cost		235,785.00

Five-Year Action Plan
Part III: Supporting Pages
Management Needs Work Statement(s)
 Capital Funding 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)

Work Statement for Year 1 FFY: 2005	Work Statement for Year: 4 FFY: 2008			Work Statement for Year: 5 FFY: 2009		
	General Description of Major Work Categories	Quantity	Estimated Cost	General Description of Major Work Categories	Quantity	Estimated Cost
See Annual Statement	Operations		52,651.00	Operations		30,119.00
	Resident Security		6,800.00	Resident Security		6,800.00
	Develop Resident Jobs Training Program and Business Development Program		66,518.00	Develop Resident Jobs Training Program and Business Development Program		68,514.00
	Coordinator of Social Service for Drug Elimination		41,595.00	Coordinator of Social Service for Drug Elimination		42,843.00
	Administration Salaries		41,237.00	Administration Salaries		41,237.00
	Administration Fringes		14,803.00	Administration Fringes		14,803.00
	Advertising		800.00	Advertising		800.00
	Audit		2,500.00	Audit		2,500.00
	Fees & Costs		1,000.00	Fees & Costs		1,000.00
	Nondwelling Equipment		35,000.00	Nondwelling Equipment		15,000.00
	Subtotal of Estimated Cost		262,904.00	Subtotal of Estimated Cost		223,616.00

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

HA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150105 Capital Fund Program Grant No: 2005 Replacement Housing Factor Grant No. 2005 Federal FY of Grant: <div style="text-align: right;">2005</div>
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Original Annual Statement
 Reserve for Disasters/Emergencies
 Revised Annual statement/Revision Number _____
 Performance and Evaluation report for Program Year Ending _____
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds	0.00	0.00	0.00	0.00
2	1406 Operations	60,000.00	0.00	0.00	0.00
3	1408 Management Improvements	89,475.00	0.00	0.00	0.00
4	1410 Administration	54,161.00	0.00	0.00	0.00
5	1411 Audit	2,000.00	0.00	0.00	0.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	1,000.00	0.00	0.00	0.00
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	40,000.00	0.00	0.00	0.00
10	1460 Dwelling Structures	238,350.00	0.00	0.00	0.00
11	1465.1 Dwelling Equipment - Nonexpendable	0.00	0.00	0.00	0.00
12	1470 Nondwelling Structures	0.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	36,000.00	0.00	0.00	0.00
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	8,630.00	0.00	0.00	0.00
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1501 Collateralization or Debt Service	0.00	0.00	0.00	0.00
20	1502 Contingency	12,000.00	0.00	0.00	0.00
21	Amount of Annual Grant (Sum of Lines 2-20)	541,616.00	0.00	0.00	0.00
22	Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23	Amount of line 21 Related to Section 504 Compliance	42,500.00	0.00	0.00	0.00
24	Amount of line 21 Related to Security - Soft Costs	5,050.00	0.00	0.00	0.00
25	Amount of line 21 Related to Security - Hard Costs	0.00	0.00	0.00	0.00
26	Amount of line 21 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

, Director September 23, 2004

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150105 Capital Fnd Program Grant No: 2005 Replacement Housing Factor Grant No: 2005			Federal FY of Grant: 2005			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No. Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA-Wide	Operations	1406		60,000.00	0.00	0.00	0.00	
HA-Wide	Management Improvements	1408						
	Resident Security			5,050.00	0.00			
	Develop Job Training & Business	1408.7		39,704.00	0.00			
	Develop Programs							
	Coordinator of Social Services for Drug Elimination			39,721.00	0.00			
	Administrative/Management Improvements	1408.9		5,000.00				
	Total for Management Improvements			89,475.00	0.00	0.00	0.00	
HA-Wide	Administration	1410						
	a. Salaries	1410.1		37,000.00	0.00			
	b. Fringe Benefits	1410.9		16,650.00	0.00			
	c. Advertising	1410.19		511.00	0.00			
	Total for Administration			54,161.00	0.00	0.00	0.00	
HA-Wide	Fees & Costs	1430						
	a. Architect			500.00	0.00			
	b. Planing Fees			500.00				
	Total for Fees & Costs			1,000.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Equipment	1475						
	a. Office/Maintenance Equipment			12,000.00	0.00			
	b. Vehicle			24,000.00				
	Total for Nondwelling Equipment			36,000.00	0.00	0.00	0.00	
HA-Wide	Relocation Cost	1495.1		0.00	0.00	0.00	0.00	
HA-Wide	Contingency	1502		12,000.00	0.00	0.00	0.00	

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150105 Capital Fnd Program Grant No: 2005 Replacement Housing Factor Grant No: 2005			Federal FY of Grant: 2005			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised	Funds Obligated	Funds Expended	
OH31-03 Ravenna Woods	Remove Trees Downspout Drainage Total for Site Improvement	1450		15,000.00 25,000.00 40,000.00	0.00	0.00	0.00	
OH31-01 Athena Gardens Community Estates	Replace Circuit Boxes Replace Smoke Detectors Replace Circuit Boxes Replace Smoke Detectors	1460	all 29	15,000.00 8,500.00 17,500.00 9,000.00				
OH31-02 Scattered Sites ST RT 183	Patio Doors Deck Replace Baseboard Heaters Replace Siding/Gutters/Downspouts		2 1 all	2,500.00 2,000.00 4,000.00 3,000.00	0.00			
OH31-03 Ravenna Woods	Replace Siding/stain/Gutters & Downspouts Replace Circuit Boxes Replace Smoke Detectors		all all all	50,000.00 16,800.00 10,000.00	0.00 0.00			
OH31-04 Eastowne Manor	Replace Tub w/Handicapped Shower Replace Smoke Detectors Install Emergency Wiring		2 all	14,000.00 16,000.00 6,000.00	0.00			
OH31-05 Town Square Villas	Replace Smoke Detectors Replace Circuit Boxes		all 30	10,500.00 18,000.00				
OH31-06 Etna House	Replace Smoke Detectors		all	6,500.00				
OH31-09 Heritage Knolls	Replace Smoke Detectors		all	10,200.00				
OH31-11 Washington Group	Replace Smoke Detectors		all	16,000.00				
OH31-15 Renaissance/ Acquisition Rehab	Replace Smoke Detectors		all	2,850.00				
	Total for Dwelling Structures			238,350.00	0.00	0.00	0.00	
	Total for Dwelling Equipment-Nonexp.	1465		0.00	0.00	0.00	0.00	
	Total for Nondwelling Structures	1470		0.00	0.00	0.00	0.00	
						0.00	0.00	

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

Development Number/Name HA-Wide Activities	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)	
OH31-01 Athena Gardens	09/30/06			06/30/07			
OH31-01 Community Estates	09/30/06			06/30/07			
OH31-02 Scattered Sites	09/30/06			06/30/07			
OH31-03 Ravenna Woods	09/30/06			06/30/07			
OH31-04 Eastowne Manor	09/30/06			06/30/07			
OH31-05 Town Square	09/30/06			06/30/07			
OH31-06 Etna House							
OH31-09 Heritage Knolls							
HA-Wide Physical Improvements							
HA-Wide Mgmt. Impr. Administration	12/31/06			03/31/08			
Fees & Costs	12/31/06			03/31/08			
Contingency	12/31/06			03/31/08			

Signature of Executive Director & Date:

X

23-Sep-04

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

X

ATTACHMENT C
Progress In Meeting 5-Year Plan Mission and Goals

1. Efficiently, effectively operate agency housing programs, while being sensitive to the needs and concerns of participants, landlords, and the community.
 - A. Ensure efficient, effective, responsive Section 8 administration
 1. Achieve SEMAP High Performer status
 - a. Conduct semi-annual internal compliance reviews
In process of conducting 1st review. Second review to be completed in December.
 2. Maximize the effectiveness of the program for applicants and participants
 - a. Target zero-income participants for integrity checks and referrals
Interim reexaminations are conducted every 60 days for families reporting zero-income. In addition to completing standard paperwork connected with recertifications, families must complete a very detailed questionnaire regarding cash and non-cash contributions made to the family. This has been very helpful in ensuring that all household income (reported and unreported) is included for purposes of calculating the subsidy level.
 - b. Continue to refine and expand MTW homeownership program
Staff is becoming more involved with our partners in connection with the programs. With the recent employment of the Homeownership Supportive Services Case Manager, the coordination with partner agencies has been enhanced and we will be involved in aspects of the program that have previously been under the sole direction of NDS. The HSS Case Manager will also make it possible to increase the number of families participating in the program at a more rapid pace (e.g. more frequent orientations, increased applicant screening, etc.).
 - c. Conduct written survey of program participants to obtain feedback on policies
Survey to be included with August newsletter.
 - d. Gather and analyze data identifying difficulties applicants have in searching for housing
Not completed. The last waiting list notification was in December of 2003. Consequently, voucher issuances and lease-up activities have ceased. Once waiting list notifications and voucher issuances resume, there will be a pool of applicants from which to gather and analyze data.
 - e. Hold periodic focus group meetings for program participants
Not completed. Meetings are planned in connection with MTW transition.
 - f. Enhance listing of available rental units
Section 8 staff regularly contact property owners to maintain an up-to-date list. The list is updated more frequently than in the past and contains a cross-section of landlords who currently rent units through the Section 8 program as well as owners who have never participated in the program.

3. Maximize efficiency of the program
 - a. Develop method/means to implement mandatory rent feature
Unable to pursue do to limitations of computer system. Implementation would require manual override of computer calculation for each affected tenant, which would be far too time consuming to be worthwhile.
 - b. Train staff on the use of various features connected with Visual MCS system (e.g. access interface, merge feature, etc.)
Staff has been trained on utilizing the merge feature and currently uses the system to process annual recertification appointment and annual HQS inspection letters. Use of the system greatly reduced the amount of time spent on the tasks and also resulted in the use of more professional looking documents.
 - c. Streamline processing procedures (e.g. eliminate redundant/non-mandatory processing paperwork)
Existing 3rd party verification forms were revised and additional forms were developed. Processing paperwork was also reviewed; unnecessary forms were removed from packet.
 - d. Research feasibility of and landlord opinions on consolidated inspections at large complexes
Based on feedback, it was determined that this MTW feature would not be pursued.
 - e. Increase staff development efforts (periodic staff in-services, retreats, etc.)
In-service training conducted by Sec. 8 Manager.
 - f. Increase activity of FSS Coordinating Committee
Outreach efforts were made to increase participation in committee and to increase attendance at periodic meetings. This is an ongoing effort.
 - g. Improve coordination between Applications and Section 8 departments
Due to the closing of the waiting list and the suspension of notifications, interaction between Section 8 staff and the Applications department are minimal. This issue will be revisited once normal notification/lease-up activities resume.
 - h. Expand use and improve effectiveness of vacated tenants system
There was a change in the format of the VTS. Once staff becomes familiar with the new system, it will be analyzed for efficiency enhancements.
4. Continue recruitment of new landlords
 - a. Hold periodic landlord seminars for potential and current Section 8 landlords
Landlord meeting planned for fall.
 - b. Research interest in landlord focus group
This item will be included for discussion/comment in connection with August landlord survey.

B. Ensure efficient, effective, responsive public housing administration

1. Maintain PHAS High Performer status

- a. Conduct quarterly site inspections of multi-family sites and address PHAS and preventative needs as soon as identified

Due to a shortage of manpower in the Maintenance Department, inspections were conducted two times during the year. As maintenance responsiveness has improved over the past year, there is staff agreement that only three inspections will be needed in the future.

2. Maximize the efficiency and effectiveness of housing management

- a. Improve efforts to relocate sole remaining family members who are overhoused.

Relocation of sole remaining family members is an on-going priority for the Public Housing Department. Sole remaining family members are either issued a voucher or when eligible, relocated to elderly housing. When a voucher is issued, improved efforts include maintaining a strong coordination between public housing and the Section 8 staff, and assuming an advocacy role with landlords on behalf of the sole remaining family member. Additionally, when necessary, the public housing staff networks with other social service agencies to ensure that sole remaining family members have a smooth transition as they leave overhoused units and move to size-appropriate units.

- b. Continue to improve lease enforcement, despite loss of PHDEP-funded position

When visiting developments, all public housing staff members are required to report visible or obvious lease violations to the Property Manager, who is responsible for follow-up with the resident. PMHA vehicles are equipped with a clipboard, pen, and various forms so staff could identify and address lease violations on the spot when appropriate. In addition to the public housing staff, the PMHA maintenance staff is also trained to identify obvious lease violations. Also, a reorganization of the public housing department resulted in the Property Manager having increased responsibility for addressing lease violations. Weekly staff meetings are held, which offers a forum for discussions of lease violations/violators and ways that the PMHA may address them. For example, incidents of domestic violence may include giving the resident a list of social service agencies that may help the resident keep her housing.

- c. Implement new rent calculation policy, as necessitated by MTW change

This task became unnecessary due to extension of MTW agreement expiration.

- d. Obtain input and develop standard housekeeping policy and improve follow-up

The development of a standardized policy is currently in progress. During public housing weekly staff meetings, discussions take place concerning the implementation of a uniform standard of housekeeping and follow-up visits. Staff members are offered the opportunity to discuss their findings from on-site inspections, and solutions are offered to standardize the entire inspection process. During housekeeping inspections, a team of staff members is on site. Thus, if there is hesitation by one staff member, another

is available to offer on-the spot input to maximize consistency. It is anticipated that a standard housekeeping policy will be in place by January 2005.

- e. Begin conducting interim housekeeping inspection 60 days after a new move-in
Initially, interim housekeeping inspections 60 days after a new move-in were completed for families suspected of or known to practice poor housekeeping skills. However, as of September 2004, this practice has been expanded to incorporate all new move-ins.
- f. Examine need for vehicle registration system and database
This objective was not accomplished and will be addressed during 2005.
- g. Improve tenant screening by utilizing more resources, such as NCIC records and Internet resources
The public housing staff utilizes all available Internet resources to improve tenant screening. PMHA does not have access to NCIC records yet.
- h. Improve collection of occupancy related charges other than rent
Collection practices have been improved as a joint effort between the Finance and Public Housing departments. Residents currently owing any charges are sent monthly letters outlining their responsibility to pay related charges and the penalties for failing to do so.
- i. Improve collection of balances owed by vacated tenants through greater outreach and other methods
Greater outreach to improve collection has been implemented through monthly mailing instigated by the public housing department. However, research into affordable alternative methods is being explored and is expected to continue into 2005.
- j. Begin to file small claim court cases for judgments for minor debts
This was not accomplished. The feasibility of pursuing small claim court as a remedy will be examined during 2005.
- k. Create and implement strategies to improve low score areas of the Resident Satisfaction Survey
Scores during 2004 did not require improvement strategies.
- l. Further refine the implementation of the community service requirement
The public housing staff has developed a policy and system for overseeing the implementation of the community service requirement.
- m. Analyze the new Public Housing Guidebook and adopt changes as needed
This activity is in process and may continue during 2005.
- n. Revise and update policies that may require change, depending upon MTW status
Policies were reviewed and MTW features that staff preferred to retain included in the draft MTW Transition Plan that was submitted to the

consultant. Policies were not updated, however, as the MTW deadline was extended through 2005.

3. Maximize the efficiency of maintenance

- a. Continue to improve customer service scores

This is an on-going effort. As a number of new employees were added to the maintenance department during 2004, an emphasis on customer service has been incorporated into the training program.

- b. Increase PHAS physical inspection score over prior year

This was not applicable as physical inspections were not conducted by REAC during 2004, because the PMHA's 2003 scores were high enough that REAC inspections are now conducted every two years.

- c. Reduce vacancy turn around time to an average of 10 days

As of August 1, 2004, the vacancy average is at 7 days.

- d. Reduce maintenance expenditures by cost reducing efforts, such as improved purchasing techniques, performing more contractor work in-house

Much more work was performed by in-house staff during 2004, reducing costs associated with the use of outside contractors. Examples include staff installation of breaker boxes and water meters at Public Housing sites and installation of windows at Westside Apartments.

- e. Refine system for tracking and monitoring work order assignments

A new tracking system was developed and implemented in order to better monitor work order status.

- f. When needed, utilize up to 20% of Capital Fund budget for routine maintenance

Due to savings in the Capital Fund program, capital improvement funds have been transferred to the operating budget for the purchase of computer and associated equipment.

2. Respond to local housing needs by developing new affordable housing opportunities for low-income households and improving resource utilization.

A. Develop affordable housing using HUD and non-HUD sources

1. Expand the supply of permanent, affordable housing, for the low-to-moderate income population in a variety of geographic areas.

- a. Analyze opportunities for acquisition or new construction that come to the attention of Portage Metropolitan Housing Authority

PMHA is exploring the possible acquisition of a subsidized property and is working with NDS to assist with their acquisition of Prospect House

- b. Keep up-to-date on financing resources, particularly loans/grants offered by Ohio Dept. of Development and Low-Income Tax Credit Program

PMHA has obtained the services of Ohio Capital Corporation for Housing in order to secure expertise for the agency with regard to resources for affordable housing development.

2. Preserve the inventory of permanent, affordable rental housing for the general low income population
 - a. Monitor HUD contracts with private owners that are expiring, and keep in contact with owners about future plans
Director and Section 8 Manager maintain contact with owners and HUD to stay informed about owners' plans for affordable housing
 - b. Administer new Section 8 vouchers received to support private project-based subsidized properties having pre-paid HUD mortgages
PMHA received and administers vouchers for 173 units at Indian Valley. PMHA has also agreed to administer vouchers for Prospect House once it is decoupled.
 3. Support the development of affordable housing for specific populations.
 - a. Meet with local service providers to identify housing needs of disabled population
The PMHA did not convene specific meetings with agencies this year. Instead, the Director served as an active member of Portage County's Comprehensive Housing Improvement Strategy (CHIS) Advisory Committee. Considerable discussion and information was shared between local planners and social service agencies.
 - b. Pursue the idea of donating vacant lots in Windham to support homeownership
The donation of 5 lots to Neighborhood Development Services took place enabling the construction of affordable single-family homes for sale to lower-income families.
- B. Use Public Housing and Section 8 resources to meet identified housing needs**
1. Monitor Tenant Preference Policy to meet identified housing needs
 - a. Work with local social service agencies to refine tenant selection preferences to meet local needs as well as maximizing utilization of resources
Needs of local agencies were met during 2004 by through the use of Project Based Section 8 vouchers in lieu of waiting list preferences due to the necessity of closing the Section 8 waiting list in May 2004.
 2. Identify alternative uses for developments having marketing issues
 - a. Evaluate the feasibility of converting public housing to Section 8 housing
The Director compared the cost of converting Public Housing units to Section 8 vouchers, and found that at this time of uncertainty for the Section 8 program, it is advisable to maintain the Public Housing stock as is.
 - b. Continue to monitor vacancy rates and alternatives for Etna House
No further steps were taken with regard to considering occupancy alternatives as the occupancy status of Etna House during 2004 was stable.

3. Use Section 8 resources to assist housing owned by non-profits
 - a. Continue to market Section 8 project-based program for non-profit owners serving special needs clients
PMHA awarded 108 project-based vouchers under the MTW feature to local agencies offering housing and services to their special needs clients.

3. Enhance the quality of life of the PMHA's residents, with particular emphasis upon promotion of family self-sufficiency.

A. Increase self-sufficiency rate in public housing

1. Ensure policies encourage family responsibility
 - a. Implement HUD's Community Service Requirement
This requirement was implemented and includes the monitoring of approximately 100 adults.
2. Encourage on-site supportive services
 - a. Continue to support non-profit partners providing supportive services to public housing residents
PMHA continues to make space available for supportive services at its Public Housing sites. However, local agencies are experiencing major funding reductions, and are not expanding services at this time. However, through the 2002 ROSS grant, case management services are being provided individually to families at their own homes by Family and Community Services.
 - b. Convert an apartment at multi-family sites to use as community space as on-site supportive services become available
This did not occur this year, as no new services were available, as noted above.
 - c. Seek grant opportunities to expand playgrounds at multi-family sites
Although the Housing and Special Projects Manager continued to search for funding sources, no new funding opportunities were found.
3. Use housing as an incentive for self-sufficiency progress
 - a. Coordinate with Portage Area Development Corp. and Neighbor Works to expand the Section 8 homeownership program
Due to funding received by NDS and improved coordination, the section 8 homeownership program grew substantially during 2004. Two homes closed, two closings are pending, and 42 families are participating in various aspects of the program.
 - b. Provide office space to PATH, Maplewood Career Center, and other local agencies offering resident self-sufficiency services or activities in return for usage of space
Space continues to be offered to PATH and Maplewood Career Center. In addition, PMHA made space available during the summer for a lunch/recreation program for children offered by Lovelight and the Community Action Council.

4. Seek out and pursue appropriate grant opportunities
 - a. Seek funding for self-sufficiency activities for PMHA participants
A HUD ROSS grant application was submitted for a small engine repair job-training program.
 - b. Seek new partnerships with local agencies agreeing to offer services to PMHA participants
A HUD Shelter Plus Care grant was awarded to the PMHA and a Memorandum of Understanding was executed with the local mental health center. In addition, the funding of a ROSS Self-Sufficiency grant enabled the PMHA to hire a homeownership case manager to enhance the coordination of the homeownership program with Neighborhood Development Services. The PMHA executed an agreement with Family and Community Services for case management services through in-home visitations for Public Housing residents. Finally, the PMHA implemented a feature of the Maintenance/Construction Job-Training Program through an arrangement with Neighborhood Development Services that involves renovation by the job trainees at homes owned by NDS.
 - c. Seek out grants for playground equipment
Effort was made to seek funding sources, but no opportunities were identified.
- B. Increase employment rate of Section 8 and public housing families.
 1. Provide incentives for tenants to generate higher income
 - a. Continue to analyze public housing rent policy
As part of the discussion of the MTW transition plan, rent policies were reviewed and discussed by the staff at length. It was determined that the agency would eventually transition to standard HUD rent procedures in order to benefit from the Uniform Income Verification system and to save money for the agency.
 - b. Continue working with social service agencies to target services to PMHA participants having zero incomes
Case management services provided by Family and Community Services to Public Housing residents were targeted to all zero income families. As part of implementing the Community Service requirement, a list of volunteer opportunities is provided by the PMHA in the hope that this will offer volunteer opportunities that lead to employment for residents required to perform community service.
 2. Provide job training and work through PMHA maintenance/construction needs
 - a. Continue the maintenance/construction job training program by implementing the second year of the ROSS (Resident Opportunities for Self-Sufficiency) grant
The construction jobs training program has grown significantly during 2004 with more participants and more opportunities for different forms of work experience.

(2005) 0

- b. Implement the computer training component of the ROSS grant
The program was successfully implemented through a scholarship arrangement with Maplewood Career Center.

Attachment D Resident Comments

October 13, 2004

The Agency Plan public hearing was held at 5:00 p.m. at the PMHA Office. Attending were Christie Anderson, Executive Director of the PMHA, Joann Sahl, an attorney with Community Legal Aid Services of Akron and John Codrea, an attorney with Community Legal Aid Services from the Ravenna office.

Ms. Sahl was the only person present when the hearing started. Ms. Anderson explained the three changes made to the draft Plan after it had been sent to Community Legal Aid Services' office in Akron.

As the two lawyers were the only attendees, and as they were familiar with the purpose of the Agency Plan, this part of the agenda was omitted following the arrival of Mr. Cordea. The lawyers had already read the draft Agency Plan and Attachments, and were prepared to ask specific questions. Therefore, the only presentation made by Ms. Anderson was an explanation of the PMHA's MTW program.

In response to questions asked by Ms. Sahl, Ms. Anderson explained the following items noted in the Agency Plan narrative:

- current Section 8 lease-up rate of the PMHA
- description of the construction and maintenance job training program, including the number of participants and funding sources
- listing of resources available to residents – Ms. Anderson agreed with Ms. Sahl that the MTW Agreement should be added to the list
- recent analysis of the Payment Standard and the determination to retain the current Payment Standard for the Section 8 program. In response to an inquiry from Ms. Sahl, Ms. Anderson stated that it is possible that the PMHA will introduce a minimum rent in the future, but only if funding restrictions make this necessary as a last resort.
- Section 8-damage claim feature of the MTW program, and how it is a marketing tool for new landlords
- proposed Public Housing housekeeping policy
- marketing problems associated with the Etna House, a general discussion of elderly housing population and the mixing of younger disabled residents, and the fact that the PMHA does not have an "Elderly Only" designation from HUD
- explanation of the MTW project-based Section 8 feature and the names of the three non-profit agencies that have participated in the program
- description of the MTW rent policies that encourage employment
- 2005 financial statement, which Ms. Anderson explained is a reflection of 2004 revenues, as Congress has not yet adopted the 2005 HUD budget
- definition of "Other singles" on the waiting list, and how the procedure of taking one out of every ten applicants was derived

Ms. Sahl questioned why the Earned Income Disregard was adopted previously for the Section 8 program and not for the Public Housing program. Ms. Anderson knew that this had been a staff decision based upon an analysis of the residents, but she stated that she did not know the details. She indicated that she would get back to Ms. Sahl with more information.

Ms. Sahl asked why the template indicated that the staff checked State criminal records for the Section 8 program but not the Public Housing program. Ms. Anderson stated that this must be an error, as the two programs both relied upon use of the State's correctional web site for information, and that the Plan would be corrected.

Ms. Sahl stated that her main issue was with the PMHA's tenant selection preferences. She expressed her strong belief that victims of domestic violence should be included as a preference. Ms. Anderson responded by stating that these individuals are served through the homeless preference, through the referral system with Safer Futures. Mr. Codrea confirmed that his clients are all referred to Safer Futures. Ms. Sahl noted an example of a victim remaining in her unit and not qualifying for a homeless preference. Ms. Sahl and Mr. Codrea explained the court process in a victim's securing of a court statement that confirms that the individual is a victim of domestic violence. Ms. Anderson agreed that exceptions could occur that would not be addressed by the current preference system and stated that she would follow up on this as a separate preference category.

Ms. Sahl questioned the Public Housing interim rent policy, based on her experience with a PMHA client. She stated that the Admissions and Occupancy policy section describing the process is confusing. Ms. Anderson stated that she is not qualified to explain specific rent calculation procedures, but would look into the concern. Ms. Anderson acknowledged that the wording in Attachment I could be stated more clearly, and would request the staff to work on this.

As there were no other issues regarding the Agency Plan, Ms. Sahl concluded by requesting that future copies of the resident newsletter be sent to her on a routine basis. Ms. Anderson agreed to provide this information.

October 12, 2004

A meeting was held to gather input from Section 8 and public housing residents regarding the proposed policy: *Decrease in Income and Rent Adjustment*. A total of five residents were in attendance. Three residents felt that the proposed policy could impact residents negatively if they were to temporarily lose 2-3 weeks of income during a month and still be responsible for their rent. These residents felt that they would have to choose between buying food, paying other bills, and paying their rent. The other two residents felt that the proposed policy is fair, and

that residents have an obligation to pay their rent regardless of experiencing a temporary income loss (less than 30 days).

September 13, 2004

A meeting of the Resident Advisory Committee was held September 13, 2004 at 6:00 p.m. at Community Estates, PATH Office. Romaine Chritton represented the PMHA. Residents in attendance were Erin Carson; Sherry Simons; Ellen Wozniak; and Tina Putt. All were residents of Community Estates. Agenda items included:

- I. Capital Funds Budget
- II. Proposed Policy-*Decreases of Income and Rent Adjustment*
- III. Other Matters

Residents were pleased with the proposed Capital Funds Budget. A recommendation was made to install portable showerheads when bathtubs are replaced.

Discussion took place regarding the proposed policy. Two residents felt that the policy is ok and did not offer additional comments. Two residents felt that the policy would negatively impact families working at temporary agencies. One resident said that both she and her husband work for temporary agencies, and the work is sporadic. Thus, if they had a three-week loss of income during a given month, they would be responsible for paying the full rental. She did not feel that her family would have the capability of paying the rent. Another resident felt that if the PMHA does not increase rent unless income increases exceed \$100 per month, then income losses over \$100 per month should warrant a rent decrease. In other words, a set amount could serve as a bar for rent adjustments.

Discussion of ceiling rents also took place. Two residents felt that the ceiling rents are too high, and if lowered, residents would feel motivated to work harder knowing that their rents would not raise above a certain amount even when their incomes do. Ms. Chritton pointed out that after Moving-To-Work ends, residents may be offered a choice of paying a flat rent or income-based rent. She also said that during 2005, flat-rent amounts would be revisited.

One resident indicated that the required third-party verification process is causing a delay in processing paperwork needed for rent adjustments. Ms. Chritton explained the required verification process, and concurred that delays are likely until computer-generated verification is more readily available.

The meeting was adjourned at 7:15 p.m.

August 11, 2004

A meeting of the Resident Advisory Committee was held August 11, 2004 at 2:30 p.m. in the PMHA office. Romaine Chritton represented the PMHA. Residents in attendance were Shannon Norris; Toni Durham; Jon Evans and Betty Baginski. Agenda items included:

- I. Capital Funds
- II. Training Programs/Section 3
- III. Network Force
- IV. Handicapped Issues
- V. Proposed Policy-*Decreases of Income and Rent Adjustment*
- VI. Other Issues
- VII. Adjournment

Discussion drifted from Capital Funds to general maintenance issues. Residents felt that maintenance fees can be too high and too specific in some cases. For example, one resident was charged for paper towels. One felt that he was unjustly charged for repairs to a door that he felt was the result of a maintenance staff using too short screws. Residents were advised that they have the right to appeal maintenance charges. Residents indicated that mulch and high-grade grass seed is needed for the play area at Renaissance Place.

Discussion was positive about the current PMHA training programs, Section 3 and Network Force opportunities available to residents. They were also enthusiastic about ROSS 2004 application submitted for small engine and auto training.

There were no concerns expressed regarding the need for reasonable accommodations at developments.

The proposed policy regarding a change in the number of income loss days led to lengthy discussion. Currently, a rent decrease is made when a resident experiences a loss of income for one week in a given month. The proposed policy would require the PMHA to process a rent adjustment when an income decrease lasts 30 calendar days or longer.

One resident stated that people currently struggle to pay their rent. She felt that a lot of people would not be able to pay their rent if an adjustment were to be made for income loss lasting 30 days or longer. Thus, they would fail to maintain their housing or pay a late fee.

Another resident felt that late fees cause people to have to work longer hours to pay the late fee, and then, when they work longer hours, their rents are increased because income has increased.

A resident stated that as income increases, rent increases and food stamps decrease. A suggestion was made to calculate rent based on net income.

One woman pointed out that her husband is required to pay child support under California law, which he is not currently doing. She pointed out that if he were to get a job, then their rent would increase and the child support payments he would make would not be taken into consideration when calculating their rent. However, child support payments received are considered as income. She suggested that child support payments made be excluded from rent calculations.

It was generally felt by the group that there were no penalties for not working.

Other issues discussed included the Community Service Requirement. A suggestion was made to allow residents to do yard work at their developments and have access to PMHA tools.

The meeting was adjourned at 3:30 p.m.

July 12, 2004

A meeting of the Resident Advisory Committee was scheduled for July 12, 2004 at 6:00 p.m. in the PMHA office. Romaine Chritton represented the PMHA. No residents attended.

June 14, 2004

A meeting of the Resident Advisory Committee was scheduled for June 14, 2004 at 6:00 p.m. in the PMHA office. Romaine Chritton represented the PMHA. No residents showed due to inclement weather.

Attachment E
Resident Advisory Committee Members

Angela Barnette	Harvest Drive
Amanda Gutierrez	Harvest Drive
LuAnne Krapinski	Harvest Drive
Chad Crago	Athena Drive
Sandra Gionfriddo	Heritage Knolls
Kathryn Livingston	Heritage Knolls
Bobbi Desch	Heritage Knolls
Roger Porter	Renaissance Place
Jackie Carlton	Renaissance Place
Betty Baginski	Renaissance Place
Linda Near	Etna House
Gladys Longstreth	Etna House
Ruby Malone	Etna House
Mary Peterson	Eastowne Drive
Raymond Dawson	Townsquare Villas
Cheryl Brown	Community Estates
Brenda Gauvin	Scattered Sites
Tami Floody	Section 8
Tiana Ligon	Section 8
Erin Carson	Community Estates
Sherry Simons	Community Estates
Ellen Wozniak	Community Estates
Tina Putt	Community Estates

Attachment F
Resident Member on the PHA Governing Board

1. Yes No: Does the PHA governing board include at least one member who is directly assisted by the PHA this year? (if no, skip to #2)

A. Name of resident member(s) on the governing board:

Teresa Carr

B. How was the resident board member selected: (select one)?

Elected

Appointed

C. The term of appointment is (include the date term expires): October 31, 2006

D.

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

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

B. Date of next term expiration of a governing board member:
October 2005

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

Judge Thomas Carnes
Portage County Probate Court
Portage County Courthouse
203 West Main Street
Ravenna, OH 44266

Attachment G

Resident Satisfaction Survey
Follow-Up Plan

No follow-up plan is required.

Attachment H

Component 10 (B) Voluntary Conversion Initial Assessments

- a. How many of the PHA's developments are subject to the Required Initial Assessments? 7
- b. How many of the PHA's developments are not subject to the Required Initial Assessments based on exemptions (e.g., elderly and/or disabled developments not general occupancy projects)? 3
- c. How many Assessments were conducted for the PHA's covered developments? 5 multi-family general occupancy and 2 elderly
- d. Identify PHA developments that may be appropriate for conversion based on the Required Initial Assessments:

Development Name	Number of Units
N/A	

- e. If the PHA has not completed the Required Initial Assessments, describe the status of these assessments. Assessments have not yet been completed for the 2 scattered site developments, as an attempt is being made to identify the projects' expenses by individual property.

Summary of Initial Assessment

An analysis of the cost incurred by HUD in operating the PMHA's Section 8 program compared to the public housing program was conducted, based on PMHA's actual costs for year 2000. At present, the analysis has been prepared for all of the PMHA's multi-family developments, including the senior buildings, but has not been completed for the individual scattered site properties.

The PUM cost of operating a public housing multi-family unit in 2000 was \$425. The cost incurred by PMHA in operating the Section 8 program was \$420 PUM. Although the costs incurred are similar for both programs, HUD invests much more per unit funding into the Section 8 program

In terms of program revenues, the PMHA received \$308 PUM for public housing in 2000 and \$432 for each Section 8 unit. This subsidy difference is attributable to the fact that public housing operating costs are offset in part by tenant rents. On the other hand, in the Section 8 program, HUD covers all \$420 in costs, as the tenant rents benefit the landlord, and do not offset program costs such as is the case with public housing rents. A conversion of all family multi-family developments to Section 8 assistance would cost

HUD at least an additional \$260,400 annually. Therefore, in terms of conserving government funds, it is more appropriate to retain PMHA's 305 housing units under the public housing program.

Two of PMHA's public housing developments have historically incurred a financial loss, and pose a drain on the PMHA's public housing program. When applying Section 8 rents to each public housing development, based on Section 8 rent reasonableness standards, these two developments would fare better financially with subsidies funded by the Section 8 program. However, besides the fact that a conversion to vouchers would increase HUD's cost, Section 8 assistance would be risky for these properties, as they both suffer from marketing problems. As stated in the PMHA's initial Moving To Work application, the future use and ownership of these properties require further study, as a Section 8 conversion is not the most desirable alternative.

At this time, the PMHA has determined that a voluntary conversion of its multi-family public housing stock to vouchers is inappropriate, as removal of the multi-family developments would not meet the necessary conditions for voluntary conversion.

Public Housing Program

Proposed Policy: Decreases in Income And Rent Adjustment

Background

Previous policy allowed for a rent adjustment to be made when residents experienced a temporary loss of employment income equal to at least a minimum of one week's income. This policy resulted in an administrative burden due to the number of interim re-certifications that were generated by this policy and the implementation of third-party verification.

Revised Policy

Residents may report, within 10 days of the occurrence, a decrease in income and other changes, such as an increase in allowances or deductions that would reduce the amount of the total tenant payment. The PMHA will process the rent adjustment when it confirms that the decrease in income or other changes will last 30 or more calendar days, (exception being the month of February in which decreases in income or other changes last 28 or 29 days as applicable).

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

(2005)-J

HA Name:
 Portage Metropolitan Housing Authority

Grant Type and Number: OH12PO3150101
 Capital Fund Program Grant No: 2001
 Replacement Housing Factor Grant No. CFP of Grant Approval:
 OH12PO3150101 2001 2001

Original Annual Statement Reserve for Disasters/Emergencies Revised Annual statement/Revision Number _____
 Performance and Evaluation report for Program Year Ending Jun-04 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		Original	Revised (1)	Obligated	Expended
1	Total Non-CGP Funds	0.00	0.00	0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)	7,742.00	46,635.10	46,635.10	36,931.31
3	1408 Management Improvements	77,930.00	91,254.08	91,254.08	88,748.79
4	1410 Administration	63,410.00	59,476.11	59,476.11	59,326.17
5	1411 Audit	1,500.00	2,000.00	2,000.00	2,000.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	0.00	707.10	707.10	707.10
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	88,000.00	136,592.69	136,592.69	135,105.19
10	1460 Dwelling Structures	244,700.00	195,867.06	195,867.06	183,026.69
11	1465.1 Dwelling Equipment - Nonexpendable	4,250.00	2,398.00	2,398.00	2,398.00
12	1470 Nondwelling Structures	0.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	0.00	27,758.39	27,758.39	27,758.39
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	20,000.00	33,096.47	33,096.47	33,096.47
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1498 Mod used for Development	0.00	0.00	0.00	0.00
19	1502 Contingency (may not exceed 8% of line 20)	4,475.00	0.00	0.00	0.00
20	Amount of Annual Grant (Sum of Lines 2-19)	512,007.00	595,785.00	595,785.00	569,098.11
21	Amount of line 19 Related to LBP Activities	0.00	0.00	0.00	0.00
22	Amount of line 19 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
23	Amount of line 19 Related to Security	5,000.00	5,000.00	0.00	0.00
24	Amount of line 19 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

Signature of Executive Director & Date:
X **Director, June 30, 2004**

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

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

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

Part II: Supporting Pages

Development Number/Name		General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
HA-Wide Activities	Original				Revised (1)	Funds Obligated (2)	Funds Expended (2)		
PHA Name:		Grant Type and Number OH12PO3150101 Capital Fund Program Grant No. 2001 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001				
HA-Wide		Operations	1406		7,742.00	46,635.10	46,635.10	36,931.31	
HA-Wide		Management Improvements	1408						
		Resident Security			5,000.00	5,000.00	5,000.00	3,924.34	
		Develop Job Training & Business			35,000.00	32,580.00	32,580.00	32,580.00	
		Develop Programs			37,930.00	40,350.00	40,350.00	39,684.04	
		Coordinator of Social Services for Drug Elimination				13,324.08	13,324.08	12,560.41	
		Administrative Management Improvements							
		Total for Management Improvements			77,930.00	91,254.08	91,254.08	88,748.79	
HA-Wide		Administration	1410						
		a. Salaries	1410.1		46,130.00	44,327.50	44,327.50	44,327.50	
		b. Fringe Benefits	1410.9		15,930.00	14,051.00	14,051.00	14,051.00	
		c. Advertising	1410.19		1,350.00	1,097.61	1,097.61	947.67	
		Total for Administration			63,410.00	59,476.11	59,476.11	59,326.17	
HA-Wide		Fees & Costs	1430						
		a. Architect			0.00	707.10	707.10	707.10	
		Total for Fees & Costs			0.00	707.10	707.10	707.10	
HA-Wide		Nondwelling Structures	1470						
		Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide		Nondwelling Equipment	1475						
		a. Office Equipment				27,758.39	27,758.39	27,758.39	
		Total for Nondwelling Equipment			0.00	27,758.39	27,758.39	27,758.39	
HA-Wide		Relocation Cost	1495.1		0.00	0.00	0.00	0.00	
HA-Wide		Contingency	1502		4,475.00	0.00	0.00	0.00	
Signature of Executive Director & Date:					Signature of Public Housing Director/Office of Native American programs Administrator & Date:				
Director, June 30, 2004					X				

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

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)	
OH31-01 Athena Gardens		Site Improvement	1450						
		Total for Site Improvement			0.00	0.00	0.00	0.00	
		Dwelling Structures	1460						
		Replace Front and Back Entrance Doors and Shed Doors	1460.21	75	42,400.00	30,286.00	30,286.00	30,286.00	
		Willmar - deadbolts & latches				732.90	732.90	732.90	
		Chad - hole covers for doors				57.64	57.64	57.64	
		Total for Dwelling Structures			42,400.00	31,076.54	31,076.54	31,076.54	
		Dwelling Equipment - Nonexpendable	1465.1						
		Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
		Nondwelling Structures	1470						
		Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
		Nondwelling Equipment	1475						
		Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	
Signature of Executive Director & Date:					Signature of Public Housing Director/Office of Native American programs Administrator & Date:				
Director, June 30, 2004					X				

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

PHA Name:		Grant Type and Number OH12PO3150101 Capital Fund Program Grant No. 2001 Replacement Housing Factor Grant No. 2001				Federal FY of Grant: 2001		
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)	
OH31-01 Community Estates	Site Improvement	1450						
	Replace Fiber in Sandbox	1450.14	250 SF	5,000.00	1,976.00	1,976.00	1,976.00	
	Install Retaining Wall	1450.11	250 LF	25,000.00	7,150.00	7,150.00	7,150.00	
	Install Security Fence	1450.11	300 LF	10,000.00	2,500.00	2,500.00	2,500.00	
	Replace patio pads & fencing				77,120.82	77,120.82	77,120.82	
	Clean out drains				4,190.00	4,190.00	4,190.00	
	Total for Site Improvement			40,000.00	92,936.82	92,936.82	92,936.82	
	Dwelling Structures	1460						
	Install Security Screens in Kitchen	1460.19	28	12,000.00	0.00	0.00	0.00	
	Install Security Screens in Bedroom	1460.19	29	12,000.00	0.00	0.00	0.00	
	Replace Front Storm Doors	1460.21	29	12,000.00	11,341.40	11,341.40	11,341.40	
	Replace Medicine Cabinets	1460.12	19	3,500.00	1,044.07	1,044.07	1,044.07	
	Replace Front, Back & Shed Doors	1460.21	87		39,039.12	39,039.12	39,039.12	
	Willmar - deadbolts & latches				1,114.66	1,114.66	1,114.66	
	Chad - hole covers for doors				86.71	86.71	86.71	
Total for Dwelling Structures			39,500.00	52,625.96	52,625.96	52,625.96		
Dwelling Equipment - Nonexpendable	1465.1							
Total for Dwelling Equipment - Nonexp.				0.00	0.00	0.00	0.00	
Nondwelling Structures	1470							
Total for Nondwelling Structures				0.00	0.00	0.00	0.00	
Nondwelling Equipment	1475							
Total for Nondwelling Equipment				0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Director, June 30, 2004

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

X

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

PHA Name: Grant Type and Number OH12PO3150101 Federal FY of Grant: 2001
 Capital Fund Program Grant No. 2001
 Replacement Housing Factor Grant No. 2001

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)	
	Site Improvement	1450						
OH31-02 Scattered Sites 224 W. Highland St Rt 183	Replace Main Sewer Line Foundation Waterproofing	1450.13	150 LF	16,500.00	0.00 12,175.00	12,175.00	10,687.50	Line item not needed Moved up from 501-02 to obligate savings
	Total for Site Improvement			16,500.00	12,175.00	12,175.00	10,687.50	
	Dwelling Structures	1460						
213 S. Willow	Replace Kitchen	1460.11	All	12,000.00	0.00	0.00	0.00	
W Elm St.	Replace Roof	1460.18	2	35,000.00	8,800.00	8,800.00	8,800.00	
1339 Franklin	Replace Side Doors	1460.21	2	1,000.00	791.56	791.56	791.56	
227 S. Walnut	Rehab Kitchen	1460.21			7,905.00	7,905.00	7,905.00	
	Total for Dwelling Structures			48,000.00	17,496.56	17,496.56	17,496.56	
	Dwelling Equipment - Nonexpendable	1465.1						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	Nondwelling Equipment	1475						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Director, June 30, 2004

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

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

PHA Name:		Grant Type and Number OH12PO3150101 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001			
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)	
OH31-04 Eastowne Manor	Site Improvement	1450						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	Dwelling Structures	1460						
	Replace Unit Door Locks	1460.19	50	10,000.00	9,632.00	9,632.00	9,632.00	
	Replace Unit Doors & Peepholes	1460.21	50		15,793.00	15,793.00	15,793.00	
	Total for Dwelling Structures			10,000.00	25,425.00	25,425.00	25,425.00	
	Dwelling Equipment - Nonexpendable	1465.1						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
Nondwelling Equipment	1475							
Total for Nondwelling Equipment				0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Director, June 30, 2004

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

X

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

PHA Name:		Grant Type and Number OH12PO3150101 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001				
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)		
OH31-05 Town Square	Site Improvement	1450							
	Additional Concrete Work/Pads	1450.14	10	16,500.00	0.00			Moved to 50102	
	Total for Site Improvement			16,500.00	0.00	0.00	0.00		
	Dwelling Structures	1460							
	Replace Medicine Cabinets	1460.12	30	5,000.00	2,805.00	2,805.00	2,805.00	Moved to 50100	
	Replace Windows	1460.14	210	83,800.00	0.00				
	Total for Dwelling Structures			88,800.00	2,805.00	2,805.00	2,805.00		
	Dwelling Equipment - Nonexpendable	1465.1							
	Total for Dwelling Equipment - Nonexp.				0.00	0.00	0.00	0.00	
	Nondwelling Structures	1470							
Total for Nondwelling Structures				0.00	0.00	0.00	0.00		
Nondwelling Equipment	1475								
Total for Nondwelling Equipment				0.00	0.00	0.00	0.00		

Signature of Executive Director & Date:

Director, June 30, 2004

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

X

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

PHA Name:		Grant Type and Number OH12PO3150101 Replacement Housing Factor Grant No. 2001			Federal FY of Grant: 2001			
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)	
	Site Improvement	1450						
OH31-9 Heritage Knolls	Concrete Pads by Units	1450.14	7	5,000.00	5,150.00	5,150.00	5,150.00	
	Concrete Work - Sidewalks	1450.14	As Needed	10,000.00	7,012.87	7,012.87	7,012.87	
	Total for Site Improvement			15,000.00	12,162.87	12,162.87	12,162.87	
	Dwelling Structures	1460						
	Convert Garage to Training Space	1460.21	75 SF	6,000.00	6,000.00	6,000.00	4,905.23	
	Replace Downspouts & Gutters	1460.14	As Needed	10,000.00	15,225.00	15,225.00	15,225.00	
	Total for Dwelling Structures			16,000.00	21,225.00	21,225.00	20,130.23	
	Dwelling Equipment - Nonexpendable	1465.1						
	Total for Dwelling Equipment - Nonexp.			0.00	0.00	0.00	0.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	Nondwelling Equipment	1475						
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Director, June 30, 2004

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

X

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

form HUD-52837 (10/96)

(2) To be completed for the Performance and Evaluation Report.

ref Handbook 7485.3

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

Part II. Supporting Pages

PHA Name: _____ Grant Type and Number OH12PO3150101 Federal FY of Grant: 2001
Replacement Housing Factor Grant No. 2001

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)	
OH31-11 Washington Group Home	Site Improvement	1450						
	Total for Site Improvement			0.00	0.00	0.00	0.00	
	Dwelling Structures	1460						
	Total for Dwelling Structures			0.00	0.00	0.00	0.00	
	Dwelling Equipment - Nonexpendable	1465.1						
	Replace Heating and A/C unit	1465.13	1	4,250.00	2,398.00	2,398.00	2,398.00	
	Total for Dwelling Equipment - Nonexp.			4,250.00	2,398.00	2,398.00	2,398.00	
	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
	Nondwelling Equipment	1475						
Total for Nondwelling Equipment				0.00	0.00	0.00	0.00	

Signature of Executive Director & Date:

Director, June 30, 2004

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

X

Annual Statement/Performance and Evaluation Report

Part III: Supporting Pages

PHA Name:

Grant Type and Number OH12PO3150101
Replacement Housing Factor Grant No. 2001

Federal FY of Grant: 2001

Development Number/Name HA-Wide	General Description of Major Work Categories	Development Account	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
Activities		Number						
OH31-03 Ravenna Woods	Site Improvement	1450						
	Underground Water Conductors				2,227.00	2,227.00	2,227.00	Moved up from 501-02
	Catch basin and drainage to road				14,991.00	14,991.00	14,991.00	
	Easement				2,100.00	2,100.00	2,100.00	
	Total for Site Improvement			0.00	19,318.00	19,318.00	19,318.00	to obligate savings
	Dwelling Structures	1460						
	Foundation Work				45,213.00	45,213.00	33,467.40	Moved up from 501-02
	Total for Dwelling Structures			0.00	45,213.00	45,213.00	33,467.40	to obligate savings
	Dwelling Equipment - Nonexpendable	1465.1						
	Total for Dwelling Equipment - Nonexp.				0.00	0.00	0.00	0.00
Nondwelling Structures	1470							
Total for Nondwelling Structures				0.00	0.00	0.00	0.00	
Nondwelling Equipment	1475							
Total for Nondwelling Equipment				0.00	0.00	0.00	0.00	

Director, June 30, 2004

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

REVISED IMPLEMENTATION SCHEDULE

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRF) Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	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)	
OH31-01 Athena Gardens	03/30/03			06/30/03	12/31/04		
OH31-01 Community Estates	03/30/03			06/30/03	12/31/04		
OH31-02 S Willow	06/30/03			09/30/03	12/31/04		
Franklin Ave.	06/30/03			09/30/03	12/31/04		
W. Elm St.	06/30/03			09/30/03	12/31/04		
OH31-03 Harvest Drive		01/31/02			12/31/04		
OH31-04 Eastowne Manor	06/30/03			09/30/03	12/31/04		
OH31-05 Town Square Villas	06/30/03			09/30/03	12/31/04		
OH31-09 Heritage Knolls	09/30/03			06/30/03	12/31/04		
OH31-11 Washington Group Home	06/30/03			09/30/03	12/31/04		
HA-Wide Physical Improvements							
HA-Wide Mgmt. Impr.	12/30/03			09/30/03	12/31/04		
Administration	12/30/03			09/30/03	12/31/04		
Fees & Costs	12/30/03			09/30/03	12/31/04		
Contingency	12/30/03			09/30/03	12/31/04		

Signature of Executive Director & Date:

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

X Director, June 30, 2004

X

(2) To be completed for the Performance and Evaluation Report.

ref Handbook 7485.3

Annual Statement/Performance and Evaluation Report
 Comprehensive Grant Program (CGP) **Part III: Implementation Schedule**

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 HA-Wide Activities	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)	

Signature of Executive Director & Date:

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

X

X

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

(2) To be completed for the Performance and Evaluation Report.

Annual Statement/Performance and Evaluation Report
 Comprehensive Grant Program (CGP) **Part III: Implementation Schedule**

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 HA-Wide Activities	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)	

Signature of Executive Director & Date:

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

X

X

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

(2) To be completed for the Performance and Evaluation Report.

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

HA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO50102 Capital Fund Program Grant No: 2002 Replacement Housing Factor Grant No. 2002 Federal FY of Grant: <div style="text-align: right;">2002</div>
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Original Annual Statement
 Reserve for Disasters/Emergencies
 Revised Annual statement/Revision Number _____
 Performance and Evaluation report for Program Year Ending Jun-04
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds	0.00	0.00	0.00	0.00
2	1406 Operations	0.00	56,840.00	56,840.00	0.00
3	1408 Management Improvements	72,600.00	75,913.65	67,400.00	48,707.12
4	1410 Administration	51,200.00	56,840.00	56,845.04	56,845.04
5	1411 Audit	1,500.00	1,500.00	0.00	0.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	15,000.00	4,896.00	4,896.00	4,630.66
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	42,000.00	97,001.00	97,001.00	97,001.00
10	1460 Dwelling Structures	299,946.00	228,505.00	228,505.00	228,505.00
11	1465.1 Dwelling Equipment - Nonexpendable	0.00	0.00	0.00	0.00
12	1470 Nondwelling Structures	0.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	5,500.00	11,708.75	11,708.75	10,177.95
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	0.00	35,200.00	15,288.66	15,288.66
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1501 Collateralization or Debt Service	0.00	0.00	0.00	0.00
20	1502 Contingency	24,261.00	0.00	0.00	0.00
21	Amount of Annual Grant (Sum of Lines 2-20)	512,007.00	568,404.40	538,484.45	461,155.43
22	Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23	Amount of line 21 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
24	Amount of line 21 Related to Security - Soft Costs	6,400.00	0.00	0.00	0.00
25	Amount of line 21 Related to Security - Hard Costs	0.00	0.00	0.00	0.00
26	Amount of line 21 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

Signature of Executive Director & Date:

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

Director, June 30, 2004

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO50102 Capital Fnd Program Grant No: 2002 Replacement Housing Factor Grant No: 2002			Federal FY of Grant: 2002			Status of Proposed Work
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No. Number	Quantity	Total Estimated Cost		Total Actual Cost		
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA-Wide	Operations	1406		0.00	56,840.00	56,840.00	0.00	
HA-Wide	Management Improvements	1408						
	Resident Security			6,400.00	6,400.00	6,400.00	411.00	
	Develop Job Training & Business			28,700.00	23,500.00	23,500.00	10,796.12	
	Develop Programs			37,500.00	37,500.00	37,500.00	37,500.00	
	Coordinator of Social Services for Drug Elimination				8,513.65			
	Management/Admin Improvements	1408.9						
	Total for Management Improvements			72,600.00	75,913.65	67,400.00	48,707.12	
HA-Wide	Administration	1410						
	a. Salaries	1410.1		36,050.00	43,225.00	43,225.00	43,225.00	
	b. Fringe Benefits	1410.9		14,050.00	13,145.00	13,145.00	13,145.00	
	c. Advertising	1410.19		1,100.00	470.00	475.04	475.04	
	Total for Administration			51,200.00	56,840.00	56,845.04	56,845.04	
HA-Wide	Fees & Costs	1430						
	a. Architect/Fees			15,000.00	4,896.00	4,896.00	4,630.66	
	Total for Fees & Costs			15,000.00	4,896.00	4,896.00	4,630.66	
HA-Wide	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Equipment	1475						
	a. writer/office Equipment			5,500.00	11,708.75	11,708.75	10,177.95	
	Total for Nondwelling Equipment			5,500.00	11,708.75	11,708.75	10,177.95	
HA-Wide	Relocation Cost	1495.1		0.00	0.00	0.00	0.00	
HA-Wide	Contingency	1502		24,261.00	0.00	0.00	0.00	

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO50102 Capital Fnd Program Grant No: 2002 Replacement Housing Factor Grant No: 2002			Federal FY of Grant: 2002			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised	Funds Obligated	Funds Expended	
OH31-05 Town Square Villas	Drainage Fences Replace Trees Landscaping Concrete Work Replace Patio Fences	1450	400 LF	10,000.00 6,000.00 2,000.00 4,000.00 20,000.00	14,890.00 0.00 0.00 0.00 25,000.00 40,000.00	14,890.00 25,000.00 40,000.00	14,890.00 25,000.00 40,000.00	
OH31-02 State Route 183	Foundations and Waterproofing				0.00			
OH31-03 Ravenna Woods	Drainage				0.00			
OH31-01 Athena Gardens	Concrete Work				17,111.00	17,111.00	17,111.00	
Total for Site Improvement				42,000.00	97,001.00	97,001.00	97,001.00	
OH31-01 Athena Gardens	Replace Siding, Gutters, Downspouts and Shutters	1460	All	104,650.00	64,555.00	64,555.00	64,555.00	
OH31-01 Community Estates	Repl Siding, shutters, Gutters, Downspouts Doors	1460	all	151,400.00 43,896.00	75,500.00	75,500.00	75,500.00	
OH31-03 Ravenna Woods	Foundation and Drainage Work	1460	as needed		0.00			501-01 to obligate savings
OH31-05 Town Square Villas	Replace Downspouts & gutters				8,000.00	8,000.00	8,000.00	
OH31-09 Heritage Knolls	Replace Windows				80,450.00	80,450.00	80,450.00	
Total for Dwelling Structures				299,946.00	228,505.00	228,505.00	228,505.00	
				0.00				
				0.00	0.00	0.00	0.00	
				0.00	0.00	0.00	0.00	

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHG) Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	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)	
OH31-01 Athena Gardens	03/31/03			06/30/04			
OH31-01 Community Estates	03/31/03			06/30/04			
OH31-05 Town Square	09/30/03			06/30/04			
HA-Wide Physical Improvements							
HA-Wide Mgmt. Impr.	09/30/03			12/31/05			
Administration	09/30/03			12/31/05			
Fees & Costs	09/30/03			12/31/05			
Contingency	09/30/03			12/31/05			

Signature of Executive Director & Date:

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

X

Director, June 30, 2004

X

Annual Statement/Performance and Evaluation Report
 Comprehensive Grant Program (CGP) **Part III: Implementation Schedule**

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

Development Number/Name HA-Wide Activities	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)	

Signature of Executive Director & Date:

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

X

X

Annual Statement/Performance and Evaluation Report
 Comprehensive Grant Program (CGP) **Part III: Implementation Schedule**

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 HA-Wide Activities	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)	

Signature of Executive Director & Date:

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

X

X

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

(2) To be completed for the Performance and Evaluation Report.

Annual Statement/Performance and Evaluation Report

Capital fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

Grant Type and Number: OH12PO3150203

Capital Fund Program Grant No: 2003

Replacement Housing Factor Grant No. 2003 Federal FY of Grant:

Portage Metropolitan Housing Authority**2003**

Original Annual Statement
 Reserve for Disasters/Emergencies
 Revised Annual statement/Revision Number _____
 Performance and Evaluation report for Program Year Ending _____
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds	0.00	0.00	0.00	0.00
2	1406 Operations	0.00	0.00	0.00	0.00
3	1408 Management Improvements	1,600.00	0.00	0.00	0.00
4	1410 Administrative Improvements	9,320.00	9,320.00	0.00	0.00
5	1411 Audit	700.00	700.00	0.00	0.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	0.00	0.00	0.00	0.00
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	1,200.00	1,200.00	0.00	0.00
10	1460 Dwelling Structures	59,405.00	47,600.00	0.00	0.00
11	1465.1 Dwelling Equipment - Nonexpendable	0.00	0.00	0.00	0.00
12	1470 Nondwelling Structures	8,000.00	4,000.00	0.00	0.00
13	1475 Nondwelling Equipment	12,980.00	30,385.00	3,116.21	3,116.21
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	0.00	0.00	0.00	0.00
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1501 Collateralization or Debt Service	0.00	0.00	0.00	0.00
20	1502 Contingency	0.00	0.00	0.00	0.00
21	Amount of Annual Grant (Sum of Lines 2-20)	93,205.00	93,205.00	3,116.21	3,116.21
22	Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23	Amount of line 21 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
24	Amount of line 21 Related to Security - Soft Costs	0.00	0.00	0.00	0.00
25	Amount of line 21 Related to Security - Hard Costs	0.00	0.00	0.00	0.00
26	Amount of line 21 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

,Director June 30, 2004

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150203 Capital Fnd Program Grant No: 2003 Replacement Housing Factor Grant No: 2003			Federal FY of Grant: 2003			Status of Proposed Work
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No. Number	Quantity	Total Estimated Cost		Total Actual Cost		
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA-Wide	Operations	1406				0.00	0.00	
HA-Wide	Management Improvements Resident Security Develop Job Training & Business Develop Programs Coordinator of Social Services for Drug Elimination Administrative/Management Improvements	1408						
	Total for Management Improvements	1408.9		1,600.00	0.00			
				1,600.00	0.00	0.00	0.00	
HA-Wide	Administration a. Salaries b. Fringe Benefits c. Advertising	1410 1410.1 1410.9 1410.19		6,500.00 2,700.00 120.00	6,500.00 2,700.00 120.00			
	Total for Administration			9,320.00	9,320.00	0.00	0.00	
HA-Wide	Fees & Costs a. Architect	1430						
	Total for Fees & Costs			0.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Equipment a. Office/Maintenance Equipment	1475		12,980.00	30,385.00	3,116.21	3,116.21	
	Total for Nondwelling Equipment			12,980.00	30,385.00	3,116.21	3,116.21	
HA-Wide	Relocation Cost	1495.1		0.00	0.00	0.00	0.00	
HA-Wide	Contingency	1502		0.00	0.00	0.00	0.00	

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150203 Capital Fnd Program Grant No: 2003 Replacement Housing Factor Grant No: 2003			Federal FY of Grant: 2003			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised	Funds Obligated	Funds Expended	
OH31-2 Scattered Sites Marks Avenue	concrete pads for sheds	1450		1,200.00	1,200.00			
	Total for Site Improvement			1,200.00	1,200.00	0.00	0.00	
OH31-01 Athena Gardens		1460						
OH31-01 Community Estates								
OH31-02 Scattered Sites 128 Garden Court	Rehab unit				34,100.00			
31-04 Eastowne Manor	Replace Lobby & Patio Furniture		As Needed	12,405.00	0.00			
31-6 Etna House	Replace Lobby Furniture Install Wall Coverings Install Vertical Blinds in Lobby & Units handrails on both sides of hallways		As Needed 85	5,000.00 24,500.00 15,000.00 2,500.00	0.00 8,000.00 3,000.00 2,500.00			
31-05 Town Square Villas								
31-11 Washington Group Home								
	Total for Dwelling Structures			59,405.00	47,600.00	0.00	0.00	
OH31-02 Scattered Sites	Total for Dwelling Equipment-Nonexp.	1465		0.00	0.00	0.00	0.00	
OH31-02 Scattered Sites Marks Avenue	Replace Sheds	1470	4	8,000.00	4,000.00			
OH31-04 Eastowne Manor	Total for Nondwelling Structures			8,000.00	4,000.00	0.00	0.00	
	Total for Nondwelling Equipment			0.00	0.00	0.00	0.00	

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

Development Number/Name HA-Wide Activities	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)	
OH31-01 Athena Gardens							
OH31-01 Community Estates							
OH31-02 Scattered Sites	09/30/04			06/30/05			
OH31-04 Eastowne Manor	06/30/04			03/31/05			
OH31-05 Town Square							
OH31-06 Etna House	06/30/04			03/31/05			
OH31-11 Washington Group Home							
HA-Wide Physical Improvements	12/31/05						
HA-Wide Mgmt. Impr.	12/31/05						
HA-Wide Administration	12/31/05						
HA-Wide Fees & Costs	12/31/05						
HA-Wide Contingency							

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

Grant Type and Number: OH12PO3150103
 Capital Fund Program Grant No: 2003
 Replacement Housing Factor Grant No. 2003 Federal FY of Grant:
2003

Portage Metropolitan Housing Authority

Original Annual Statement Reserve for Disasters/Emergencies Revised Annual statement/Revision Number _____
 Performance and Evaluation report for Program Year Ending 6/30/2004 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds	0.00	0.00	0.00	0.00
2	1406 Operations	51,757.00	25,027.90	226.14	226.14
3	1408 Management Improvements	113,000.00	68,234.18	14,829.28	14,829.28
4	1410 Administrative Improvements	51,200.00	46,767.00	45,358.74	45,358.74
5	1411 Audit	1,500.00	1,500.00	0.00	0.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	7,000.00	525.96	300.96	300.96
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	0.00	0.00	0.00	0.00
10	1460 Dwelling Structures	312,400.00	269,952.96	269,952.96	250,887.86
11	1465.1 Dwelling Equipment - Nonexpendable	0.00	15,667.00	15,667.00	15,667.00
12	1470 Nondwelling Structures	9,000.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	15,000.00	5,000.00	0.00	0.00
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	0.00	35,000.00	7,025.81	7,025.81
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1501 Collateralization or Debt Service	0.00	0.00	0.00	0.00
20	1502 Contingency	7,547.00	0.00	0.00	0.00
21	Amount of Annual Grant (Sum of Lines 2-20)	568,404.00	467,675.00	353,360.89	334,295.79
22	Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23	Amount of line 21 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
24	Amount of line 21 Related to Security - Soft Costs	6,200.00	6,200.00	0.00	0.00
25	Amount of line 21 Related to Security - Hard Costs	0.00	0.00	0.00	0.00
26	Amount of line 21 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

,Director June 30, 2004

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150103 Capital Fnd Program Grant No: 2003 Replacement Housing Factor Grant No: 2003			Federal FY of Grant: 2003			Status of Proposed Work
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No. Number	Quantity	Total Estimated Cost		Total Actual Cost		
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA-Wide	Operations	1406		51,757.00	25,027.90	226.14	226.14	
HA-Wide	Management Improvements	1408						
	Resident Security			6,200.00	6,200.00			
	Develop Job Training & Business							
	Develop Programs			69,100.00	20,034.18			
	Coordinator of Social Services for Drug Elimination			37,700.00	40,000.00	14,829.28	14,829.28	
	Administrative/Management Improvements	1408.9			2,000.00			
	Total for Management Improvements			113,000.00	68,234.18	14,829.28	14,829.28	
HA-Wide	Administration	1410						
	a. Salaries	1410.1		36,050.00	34,050.00	32,983.64	32,983.64	
	b. Fringe Benefits	1410.9		14,050.00	12,117.00	11,737.76	11,737.76	
	c. Advertising	1410.19		1,100.00	600.00	637.34	637.34	
	Total for Administration			51,200.00	46,767.00	45,358.74	45,358.74	
HA-Wide	Fees & Costs	1430						
	a. Architect/service fees			7,000.00	525.96	300.96	300.96	
	Total for Fees & Costs			7,000.00	525.96	300.96	300.96	
HA-Wide	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Equipment	1475						
	a. Office/Maintenance Equipment			15,000.00	5,000.00			
	Total for Nondwelling Equipment			15,000.00	5,000.00	0.00	0.00	
HA-Wide	Relocation Cost	1495.1		0.00	0.00	0.00	0.00	
HA-Wide	Contingency	1502		7,547.00	0.00	0.00	0.00	

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150103 Capital Fnd Program Grant No: 2003 Replacement Housing Factor Grant No: 2003			Federal FY of Grant: 2003			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised	Funds Obligated	Funds Expended	
	Total for Site Improvement	1450		0.00	0.00	0.00	0.00	
OH31-01 Athena Gardens	Replace flooring Replace Interior Doors Replace Interior Trim Replace all door knobs except closets	1460		50,000.00 26,250.00 9,000.00	29,686.00 31,915.00 18,500.00 1,604.20	29,686.00 31,915.00 18,500.00 1,604.20	29,686.00 31,915.00 18,500.00 1,604.20	
OH31-01 Community Estates	Replace flooring replace Interior doors Replace Interior trim Replace all door knobs except closets		174 6525LF	68,000.00 30,450.00 10,000.00	57,860.00 30,262.53 9,730.00 1,519.14	57,860.00 30,262.53 9,730.00 1,519.14	57,860.00 30,262.53 9,730.00 1,519.14	
OH31-02 Scattered Sites	1339 Franklin Ave. Install Carpet LVRm, Dining & Hall 9876 & 9899 Blanton Dr. Replace closet doors All Scattered Sites Replace Kitchen Appliances 227 S. Walnut St. Replace carpet and rubber cover base Replace Kitchen Cabinets, sinks & faucets 224 Highland - Rehab unit			1,200.00 2,500.00 20,000.00 12,000.00	0.00 1,210.00 0.00 0.00 13,789.00 0.00 53,392.00	1,210.00 1,210.00 13,789.00 53,392.00	1,210.00 1,210.00 13,789.00 34,326.90	Moved from 501-04
31-04 Eastowne Manor	Repl carpet Com Rm & first floor hallway Replace Lobby & Patio Furniture		As Needed	12,000.00	5,225.00 0.00	5,225.00	5,225.00	
31-6 Etna House	Replace Lobby Furniture Install Wall Coverings Install Mini Blinds in Lobby & Units Repl carpet 2nd & 3rd floor hallways		As Needed 85	3,000.00 35,000.00 15,000.00	0.00 0.00 0.00 3,848.00	3,848.00	3,848.00	
31-05 Town Square Villas	Replace all door knobs except closets				1,644.78	1,644.78	1,644.78	material only need labor cost
31-11 Washington Group Home	Rehab Kitchen for ADA			18,000.00	9,767.31	9,767.31	9,767.31	
	Total for Dwelling Structures			312,400.00	269,952.96	269,952.96	250,887.86	
OH31-02 Scattered Sites	Replace Ranges & Refrigerators Total for Dwelling Equipment-Nonexp.	1465		0.00	15,667.00 15,667.00	15,667.00 15,667.00	15,667.00 15,667.00	
OH31-02 Scattered Sites	4325, 4327, 4333, 4399 Marks Ave. Replace Sheds	1470		4,000.00	0.00			
OH31-04 Eastowne Manor	Replace Shed			5,000.00	0.00			
	Total for Nondwelling Structures			9,000.00	0.00	0.00	0.00	
	Total for Nondwelling Equipment		Page 2 of 2	0.00	0.00	0.00	0.00	

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

Development Number/Name HA-Wide Activities	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)	
OH31-01 Athena Gardens		03/31/04			06/30/04		
OH31-01 Community Estates		03/31/04			06/30/04		
OH31-02 Scattered Sites		09/30/04			12/31/04		
OH31-04 Eastowne Manor		09/30/04			12/31/04		
OH31-05 Town Square		06/30/04			12/31/04		
OH31-06 Etna House		09/30/04			12/31/04		
OH31-11 Washington Group Home		03/31/04			12/31/04		
HA-Wide Physical Improvements							
HA-Wide Mgmt. Impr.		12/31/05					
Administration		12/31/05					
Fees & Costs		12/31/05					
Contingency		12/31/05					