

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

Housing And Community Services Agency (HACSA) of Lane County

5 Year Plan for Fiscal Years 2005 - 2009
Annual Plan for Federal Fiscal Year 2005
Annual Plan for Agency Fiscal Year 2006

PHA Plan Agency Identification

PHA Name: Housing And Community Services Agency (HACSA) of Lane County

PHA Number: OR-006

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

Public Access to Information

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

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

Display Locations For PHA Plans and Supporting Documents

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

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

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

- Main business office of the PHA (**Day Island office – Eugene & Fairview office – Springfield**)
- 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: **Working together we are making a difference in the quality of housing and related community services.**

B. Goals

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

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

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

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

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: **Preference given to elderly/disabled applicants at Parkview Terrace, Veneta Villa, Cresview Villa, Riverview Terrace, McKenzie Village (one-bedroom units), Lindeborg Place, and Laurelwood Homes (one-bedroom units).**

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: **Continue to provide a high level of service to disabled residents.**
 - ✓ **Continue to support Public Housing and Section 8 participants in becoming homeowners.**
 - ✓ **Assist Public Housing and Section 8 FSS participants in obtaining Individual Development Accounts (IDAs).**

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: **To continue ensure that all applicants and participants have equal access to our programs, our 504 Coordinator reviews and approves reasonable accommodation (RA) requests that meet the criteria outlined in our RA policy.**

Other PHA Goals and Objectives: (list below)

Goal 1: Increase the number of affordable housing units by September 2009.

Indicator: -Build and/or purchase 250 housing units using a mix of local and federal funding.

Goal 2: Continue to receive high performer status through September 2009.

Indicators: -Obligate all Comp Grant (Capital Funds) within 18 months of grant award.
-Expend all Comp Grant (Capital Funds) with 36 months of grant award.
-Submit all MASS, RASS, and PHAS reports within required timelines.
-Score over 25 in the PHAS physical condition indicator.
-Score over 25 in the PHAS management operation indicator.
-Score over 6 in the Resident Services and Satisfaction indicator in PHAS.

Goal 3: Maintain a PHAS financial score of at least 30 (out of 30) or 100% through September 2009.

Indicators: -Maintain a current ratio (unrestricted current assets/current liabilities) of at least 1.75:1
-Maintain an expendable fund balance {unrestricted current assets current liabilities (excluding current portion of long-term debt)} to cover at least 3 months of operations.
-Maintain tenant receivables outstanding of an average of less than 30 days.
-Maintain an occupancy loss ratio of less than 3%.
-Maintain a percentage positive ratio of net income (excluding depreciation) to expendable fund balance.
-Maintain a weighted average expense ratio of less than \$89.04 per unit per month.

Goal 4: Continue to encourage and promote resident involvement through September 2009.

- Indicators:
- Maintain the level of resident-elected Tenant Advisory Group (TAG) representation at approximately 70% (69.23%) of Public and Assisted Housing complexes (9 out of 13 complexes).
 - Assist residents in maintaining Resident Coordinating Groups and/or Resident Councils at 100% of Public and Assisted Housing complexes (13 out of 13 complexes).
 - Assist residents in maintaining Resident Newsletters at approximately 60% (61.54%) of Public and Assisted Housing complexes (8 out of 13 complexes).

Goal 5: Maintain a minimum enrollment of one hundred and two (102) Section 8 and thirty-five (35) Public Housing families in the Family Self-Sufficiency (FSS) Program.

- Indicator:
- Maintain a minimum representation of fifteen (15) community service agencies on the Family Self-Sufficiency Advisory Board.
 - Promote the Family Self-Sufficiency Program, within the Section 8 Program, by presenting FSS information at a minimum of 50% of the new tenant Briefings for new Section 8 participants through September 2005.
 - Continue the promotion of the FSS program through annual mailings of FSS information brochures to all Section 8 and Public Housing residents.

Goal 6: Family Self-Sufficiency (FSS) Homeownership Program

- Indicator:
- Assist a minimum of two FSS participants a year in purchasing a home.
 - Assist a minimum of two FSS participants in opening an Individual Development Account (IDA) for a down payment on a home.
 - HACSA joined the Valley Individual Development Accounts (VIDAs) collaborative as a way of assisting FSS participants to access funding to reach their goals of home ownership and higher education.

Goal 7: Create two local preferences for persons with disabilities and for victims of domestic violence who are leaving transitional housing. (Section 8 tenant-based assistance only)

- Indicators:
- Allocate a maximum number (25) of Housing Choice Vouchers, to be used during a 5 year period with agencies or non profits that provide services to low income disabled individuals or families with disabled individuals. During the 5 year period the agency or non profit will provide on-going case management and services that allow the Section 8 family to maintain independent living.
 - Allocate a maximum number (25) of Housing Choice Vouchers, to be used during a 5 year period to victims of domestic violence and have completed the transitional housing program through Women Space. Women Space would need to provide on-going case management to these Section families to maintain their housing.
 - Work with a broad base of agencies that provide these services.

Goal 8: To provide decent, safe and sanitary housing for very low income families while maintaining their rent payments at an affordable level.

- Indicators:
- To review the payment standard yearly and to monitor the private market rents so Section 8 families have a greater opportunity to rent outside of poverty areas and increase the supply of housing choices.
 - The Section 8 Supervisor will perform quality control inspections of recently completed Housing Quality Standards (HQS) inspections to maintain, decent, safe, and sanitary housing for families (34 – 60 inspections per year).

Goal 9: To promote a housing program which maintains quality service and integrity while providing an incentive to private property owners to rent to very low income families.

- Indicators:
- Maintain a professional working relationship with landlords/owners in our community through education and seminars on the Section 8 program. Through quality service to landlords/owners they will recognize the value of renting to Section 8 families. The Section 8 Supervisor will be a board member on the local Rental Owners Association.
 - By monitoring the payment standards and area rents on the private market, Section 8 families' portion of rent will remain affordable, while the Agency continues to serve the same number of families as in previous years.

Goal 10: Section 8 Homeownership Program (with subsidy assistance)

- Indicators:
- Maintain Section 8 Vouchers homeownership program that provides information that relates to our partnerships with other non profit housing providers, availability of down payment assistance, and accessible low interest loans.
 - Keep Section 8 participants informed of the program through briefings and informational mailings.

**Annual PHA Plan
PHA Fiscal Year 2006**

[24 CFR Part 903.7]

i. Annual Plan Type:

Select which type of Annual Plan the PHA will submit.

Standard Plan

Streamlined Plan:

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

Troubled Agency Plan

ii. Executive Summary of the Annual PHA Plan

[24 CFR Part 903.7 9 (r)]

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

The Housing And Community Services Agency of Lane County has prepared this Agency Plan in accordance with Section 511 of the Quality Housing and Work Responsibility Act of 1998 and the ensuing HUD requirements.

The plans, statements, budget summary, and policies set forth in the Annual Plan all lead towards the accomplishment of our goals and objectives. Taken as a whole, they outline a comprehensive approach towards our goals and are consistent with the Consolidated Plan of Eugene and Springfield.

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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

Table of Contents

	<u>Page #</u>
Annual Plan	
i. Executive Summary	
ii. Table of Contents	
1. Housing Needs	6
2. Financial Resources	11
3. Policies on Eligibility, Selection and Admissions	12
4. Rent Determination Policies	20
5. Operations and Management Policies	23
6. Grievance Procedures	24
7. Capital Improvement Needs	25
8. Demolition and Disposition	27
9. Designation of Housing	28
10. Conversions of Public Housing	29
11. Homeownership	30
12. Community Service Programs	31
13. Crime and Safety	34
14. Pet Policy	35
15. Civil Rights Certifications (included with PHA Plan Certifications)	35
16. Audit	35
17. Asset Management	36
18. Other Information – Resident Police Officer	36

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)

Attachment A	Capital Fund '05 Annual Statement
Attachment B	Capital Fund 5-Yr Plan
Attachment C	Capital Fund '03-1 P & E Report
Attachment D	Capital Fund '03-2 P & E Report
Attachment E	Capital Fund '04 P & E Report
Attachment F	Initial Assessment Conversion of Public Housing
Attachment G	Substantial Deviations
Attachment H	Resident Membership of the PHA Governing Board
Attachment I	RAB Representatives
Attachment J	Deconcentration
Attachment K	RAB Comments

Supporting Documents Available for Review

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
✓	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
✓	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
✓	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	5 Year and Annual Plans
✓	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
✓	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
✓	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
✓	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
✓	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with	Annual Plan: Eligibility, Selection, and Admissions Policies

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	
✓	Public housing rent determination policies, including the methodology for setting public housing flat rents ✓ check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
✓	Schedule of flat rents offered at each public housing development <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
✓	Section 8 rent determination (payment standard) policies ✓ check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
✓	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
✓	Public housing grievance procedures ✓ check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
✓	Section 8 informal review and hearing procedures <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
✓	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
N/A	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
N/A	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
N/A	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
N/A	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
N/A	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
✓	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
✓	Policies governing any Section 8 Homeownership program ✓ check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
✓	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency

List of Supporting Documents Available for Review

Applicable & On Display	Supporting Document	Applicable Plan Component
✓	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
✓	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
N/A	The most recent Public Housing Drug Elimination Program (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
✓	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
N/A	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
✓	Resident Police Officer Documentation	Safety and Crime Prevention

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	Affordability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	9,109	5	5	3	1	N/A	N/A
Income >30% but <=50% of AMI	6,499	5	5	3	1	N/A	N/A
Income >50% but <80% of AMI	8,288	4	5	3	1	N/A	N/A
Elderly	5,306	5	5	3	N/A	N/A	N/A
Families with Disabilities	37,307	5	5	3	5	N/A	N/A
White	286,075	5	5	3	1	N/A	N/A
Black	2,391	5	5	3	1	N/A	N/A
American Indian	3,268	5	5	3	1	N/A	N/A
Asian	6,390	5	5	3	1	N/A	N/A
Hispanic	14,874	5	5	3	1	4	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: 2005
- U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") dataset 2000
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input checked="" type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	6660		14%
Extremely low income <=30% AMI	5661	85%	
Very low income (>30% but <=50% AMI)	932	14%	
Low income (>50% but <80% AMI)	67	1%	
Families with children	3846	58%	
Elderly families	727	11%	
Families with Disabilities	2500	38%	
Hispanic	595	8%	
Black	177	3%	
Native American	146	2%	
Asian	83	1%	
White	6254	94%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	996	62%	
2 BR	317	20%	
3 BR	261	16%	
4 BR	32	2%	
5 BR			
5+ BR			

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)?

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.

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

Select all that apply

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

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select all that apply

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

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

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

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

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

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

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

Select if applicable

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

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

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

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

(2) Reasons for Selecting Strategies

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

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

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

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

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2005 grants)		
a) Public Housing Operating Fund	1,660,294	
b) Public Housing Capital Fund	1,376,974	
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	14,000,000	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants		
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
ROSS 02' & 03'	150,000	Resident Services
2. Prior Year Federal Grants (unobligated funds only) (list below)		
Capital Fund 04'	700,000	Modernization & Mgt Imp
3. Public Housing Dwelling Rental Income	1,263,010	PH Operations
4. Other income Interest	22,500	Operations
Tenant Repairs	17,700	Operations
Other	47,560	Operations
4. Non-federal sources (list below)		
Total resources	19,238,038	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.7 9 (c)]

A. Public Housing

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

(1) Eligibility

- a. When does the PHA verify eligibility for admission to public housing? (select all that apply)
- When families are within a certain number of being offered a unit: (state number)
 - When families are within a certain time of being offered a unit: (state time)
 - Other: **Initial eligibility is determined at the time the application is submitted.**
- b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?
- Criminal or Drug-related activity
 - Rental history
 - Housekeeping
 - Other (describe)
- c. Yes No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- d. Yes No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- e. Yes No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

(2) Waiting List Organization

- a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)
- Community-wide list
 - Sub-jurisdictional lists
 - Site-based waiting lists
 - Other (describe)
- b. Where may interested persons apply for admission to public housing?
- PHA main administrative office(s)
 - PHA development site management office
 - Other (list below) **Through the mail.**
- c. If the PHA plans to operate one or more site-based waiting lists in the coming year, answer each of the following questions; if not, skip to subsection **(3) Assignment**
1. How many site-based waiting lists will the PHA operate in the coming year?

2. Yes No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD-approved site based waiting list plan)?
If yes, how many lists?
3. Yes No: May families be on more than one list simultaneously?
If yes, how many lists?
4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?
- PHA main administrative office
 - All PHA development management offices
 - Management offices at developments with site-based waiting lists
 - At the development to which they would like to apply
 - Other (list below)

(3) Assignment

- a. How many vacant unit choices are applicants ordinarily given before they fall to the bottom of or are removed from the waiting list? (select one)
- One
 - Two
 - Three or More (**with cause**)
- b. Yes No: Is this policy consistent across all waiting list types?
- c. If answer to b is no, list variations for any other than the primary public housing waiting list/s for the PHA:

(4) Admissions Preferences

- a. Income targeting:
- Yes No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?
- b. Transfer policies:
In what circumstances will transfers take precedence over new admissions? (list below)
- Emergencies
 - Overhoused
 - Underhoused
 - Medical justification
 - Administrative reasons determined by the PHA (e.g., to permit modernization work)
 - Resident choice: (state circumstances below)
 - Other: (list below)
Reasonable accommodations.

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)

If needed, preference will be given to meet the 40% requirement.

If needed, preference will be given to meet deconcentration requirements.

Incentive transfers.

Participants who are over/under housed.

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

2 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

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

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

Preference only used when needed. If not needed, time and date of application are 1.

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)

Resident Handbook and Web Site

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)

SEE DECONCENTRATION ATTACHMENT

(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)
One year for drug and criminal activity. If complying with court order or drug treatment program, applicant qualifies for program.

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

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

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

e. Indicate what kinds of information you share with prospective landlords? (select all that apply)

- Criminal or drug-related activity
 Other (describe below)

Tenant damages.

Name and address of last two Section 8 landlords.

(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)

Through the mail.

(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:

If unable to locate a suitable unit, applicant must provide a list of units and reasons why they were unsuitable.

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

Fire displaced renters who are income eligible.

Through Fair Share allocation, 20% of tenant based assistance is dedicated to families with a disability.

SDS Title XIX

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

2 Date and Time

Former Federal preferences

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

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
1 Veterans and veterans' families (**Homeless and mental illness**)
 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
1 Other preference(s) (list below)

Fire displaced renters who are income eligible.

Through Fair Share allocation, 20% of tenant based assistance is dedicated to families with a disability.

SDS Title XIX

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

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

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

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

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

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

(5) Special Purpose Section 8 Assistance Programs

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

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

Top of the list orientations.

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

- ✓ Through published notices
- ✓ Other (list below)

Networking and partnerships with other agencies.

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

- ✓ \$0
- \$1-\$25
- \$26-\$50

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

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

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

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

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

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

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

If yes, state amount/s and circumstances below:

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

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

e. Ceiling rents

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

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

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

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

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

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

f. Rent re-determinations:

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

- Never
- At family option
- Any time the family experiences an income increase
- Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold) **\$200**
- Other (list below) **Any time family composition changes.**

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

(2) Flat Rents

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

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

B. Section 8 Tenant-Based Assistance

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

(1) Payment Standards

Describe the voucher payment standards and policies.

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

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

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

- FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area
 - The PHA has chosen to serve additional families by lowering the payment standard
 - Reflects market or submarket
 - Other (list below)
- c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply)
- FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area
 - Reflects market or submarket
 - To increase housing options for families
 - Other (list below)
- d. How often are payment standards reevaluated for adequacy? (select one)
- Annually
 - Other (list below)
- e. What factors will the PHA consider in its assessment of the adequacy of its payment standard? (select all that apply)
- Success rates of assisted families
 - Rent burdens of assisted families
 - Other (list below)

(2) Minimum Rent

- a. What amount best reflects the PHA's minimum rent? (select one)
- \$0
 - \$1-\$25
 - \$26-\$50 (Option to implement in Section 8 Admin Plan – up to \$50)
- b. Yes No: Has the PHA adopted any discretionary minimum rent hardship exemption policies? (if yes, list below)

5. Operations and Management

[24 CFR Part 903.7 9 (e)]

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

A. PHA Management Structure

Describe the PHA's management structure and organization.

(select one)

- An organization chart showing the PHA's management structure and organization is attached.
- A brief description of the management structure and organization of the PHA follows:

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.

A. Public Housing

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

If yes, list additions to federal requirements below:

2. Which PHA office should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)
 - PHA main administrative office
 - PHA development management offices
 - Other (list below)

B. Section 8 Tenant-Based Assistance

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

If yes, list additions to federal requirements below:

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

7. Capital Improvement Needs

[24 CFR Part 903.7 9 (g)]

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

A. Capital Fund Activities

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

(1) Capital Fund Program Annual Statement

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

Select one:

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

-or-

Attachment A

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

(2) Optional 5-Year Action Plan

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

- a. Yes No: Is the PHA providing an optional 5-Year Action Plan for the Capital Fund? (if no, skip to sub-component 7B)
- b. If yes to question a, select one:
- The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state name
-or- **Attachment B**)
- 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: (DD/MM/YY)	
5. Number of units affected:	
6. Coverage of action (select one)	
<input type="checkbox"/> Part of the development	
<input type="checkbox"/> Total development	
7. Timeline for activity:	
a. Actual or projected start date of activity:	
b. Projected end date of activity:	

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: (DD/MM/YY)	
5. If approved, will this designation constitute a (select one)	
<input type="checkbox"/> New Designation Plan	
<input type="checkbox"/> Revision of a previously-approved Designation Plan?	
6. Number of units affected:	
7. Coverage of action (select one)	
<input type="checkbox"/> Part of the development	
<input type="checkbox"/> Total development	

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

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

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)

Part of the development

Total development

B. Section 8 Tenant Based Assistance

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

2. Program Description:

a. Size of Program

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

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

25 or fewer participants

26 - 50 participants

51 to 100 participants

more than 100 participants

b. PHA-established eligibility criteria

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

If yes, list criteria below:

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (1)]

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

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

Yes No: Has the PHA 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? (list below)

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

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

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

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

C. Coordination between PHA and the police

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

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

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

D. Additional information as required by PHDEP/PHDEP Plan

PHAs eligible for FY 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 2000 in this PHA Plan?
- Yes No: This PHDEP Plan is an Attachment. (Attachment Filename: ____)

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

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

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

1. Yes No: Is the PHA required to have an audit conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h))?
(If no, skip to component 17.)
2. Yes No: Was the most recent fiscal audit submitted to HUD?
3. Yes No: Were there any findings as the result of that audit?
4. Yes No: If there were any findings, do any remain unresolved?
If yes, how many unresolved findings remain? _____

5. Yes No: Have responses to any unresolved findings been submitted to HUD?
If not, when are they due (state below)?

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

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

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

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

1. X 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)
- X Attached at Attachment (File name) or006k05.pdf
 - Provided below:
3. In what manner did the PHA address those comments? (select all that apply)
- X 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: **Eugene / Springfield**
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)

- Increase the supply of rental housing and consider the related service needs of low and very low income households.
- Expand the conservation and improvement of existing renter housing to support neighborhood stability and revitalization activities.
- Increase the range of housing options and related services for special needs populations.
- Ensure equal access to affordable and supportive housing for all individuals.
- Work towards removing barriers to provide affordable and supportive housing

Other: (list below)

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

By certifying the consistency between the Consolidated Plan and the Agency Plan.

D. Other Information Required by HUD

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

**On site police officer documentation included in Supporting Documents.
Attachments**

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

Annual Statement / Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPHF) Part I : Summary					
PHA Name: Housing and Community Services Agency of Lane Co.		Grant Type and Number Capital Fund Program Grant No. OR16P006 501 05 Replacement Housing Factor Grant No.			Federal FY of Grant FY 05
<input checked="" type="checkbox"/> Original Annual Statement Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement (Revision no:) <input type="checkbox"/> Performance and Evaluation Report for Period Ending <input type="checkbox"/> Final Performance and Evaluation Report					
Line No	Summary of Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds				
2	1406 Operations	256,013.80			
3	1408 Management Improvements	33,250.00			
4	1410 Administration+ Staff A/E Fees	210,299.90			
5	1411 Audit	2,000.00			
6	1415 Liquidated Damages	-			
7	1430 Fees and Costs	4,250.00			
8	1440 Site Acquisition	-			
9	1450 Site Improvement	118,500.00			
10	1460 Dwelling Structures	577,000.00			
11	1465.1 Dwelling Equipment - Nonexpendable	13,600.00			
12	1470 Nondwelling Structures	-			
13	1475 Nondwelling Equipment	17,400.00			
14	1485 Demolition	-			
15	1490 Replacement Reserve	-			
16	1492 Moving to Work Demonstration	-			
17	1495.1 Relocation	15,000.00			
18	1499 Development Activities	-			
19	1501 Collaterization or Debt Services	-			
20	1502 Contingency	45,685.30			
21	Amount of Annual Grant (Sum of lines 2-20)	1,292,999.00			
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance	79,100.00			
24	Amount of line 21 Related to Security - Soft Costs				
25	Amount of Line 21 Related to Security - Hard Costs				
26	Amount of Line 21 Related to Energy Conservation	29,000.00			

Annual Statement / Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) PART II: Supporting Pages								
PHA NAME: HOUSING & COMMUNITY SERVICES AGENCY OF LANE COUNTY		Grant Type and Number Capital Fund Program Grant No. OR16P006 501 05 Replacement Housing Factor Grant No.			Federal FY of Grant: <p style="text-align: center;">FY 05</p>			
Dev. No	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost Original Revised		Total Actual Cost Obligated Expended		Status of Work
OR6-01 Laurelwood Homes	RECONSTRUCTION OF UNITS-ongoing work: 4 three bedroom units <i>(Completes a total of 24 of 30 units)</i>		4 units					
Florence, OR	Site Improvements; underground utilities, shrub bed, patio & entry porch, walks, ramps & plantings	1450		40,000.00				
	Building: Total Reconstruction of 2 duplex buildings, interior and exterior with energy use improvements	1460		472,000.00				
	Appliances (based on Energy Star ratings) Stove, Refrigerator and Range Hood	1465		8,000.00				
TOTAL 6-01 WORK				520,000.00				
OR6-02 McKenzie Village Springfield, OR	KITCHEN AND BATH REMODELS: Asbestos abatement of entire unit's floor tile and replacement, reconfigure kitchen to create laundry area; change plumbing, upgrade electrical, installation of new cabinets, counters and sinks <i>(completes a total 4 units of 163 to do - performed at vacate)</i>	1460	1 unit	33,000.00				
<i>Continues next page:</i>	Appliances for Kitchen remodel (based on Energy Star ratings) Stove, Refrigerator and Range Hood	1465		2,000.00				

Annual Statement / Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) PART II: Supporting Pages								
PHA NAME: HOUSING & COMMUNITY SERVICES AGENCY OF LANE COUNTY		Grant Type and Number Capital Fund Program Grant No. OR16P006 501 05 Replacement Housing Factor Grant No.			Federal FY of Grant: <p style="text-align: center;">FY 05</p>			
Dev. No	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost Original Revised		Total Actual Cost Obligated Expended		Status of Work
<i>OR6-02,3 continued</i>	OTHER SITE IMPROVEMENTS: Deferred Maintenance							
	<u>Tree Removal and Trimming:</u> Work to trim or remove trees, replanting as required, in this densely treed development. The large and aging trees drop limbs, overhang and threaten buildings and parked cars, roots continue to infiltrate the water/sewer pipe drains, and raise sidewalks creating tripping hazards. Safety and Sanitary concerns.	1450	Project: 172 units	50,000.00				
	<u>Water/Sewer Drain Line Replacements:</u> (Phase 1) Initiation of on-going work to replace lines from building to street; original concrete pipe has been infiltrated by tree roots, opened or destroyed by trees and other forces	1450	5 units	15,000.00				
	<u>Replacement of Sidewalks at Street and to Units:</u> (Phase 1) Initiation of on-going funded sidewalk work: Aging 40+year old sidewalks have been cracked or raised by trees requiring replacement for safe use and to eliminate tripping hazards.	1450		10,000.00				
TOTAL 6-02 WORK				<i>110,000.00</i>				

Annual Statement / Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) PART II: Supporting Pages								
PHA NAME: HOUSING & COMMUNITY SERVICES AGENCY OF LANE COUNTY		Grant Type and Number Capital Fund Program Grant No. OR16P006 501 05 Replacement Housing Factor Grant No.			Federal FY of Grant: <p style="text-align: center;">FY 05</p>			
Dev. No	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost Original Revised		Total Actual Cost Obligated Expended		Status of Work
OR6-05 Lindeborg Place Junction City OR	REMODEL ONE UNIT FOR '504 ACCESSIBILITY REQUIREMENTS: Interior renovation to establish disabled compliance kitchen and bath and other areas accessible for disabled residents.	1460	1 unit	27,000.00				
	Appliances suited best for accessibility needs (based on Energy Star ratings) Stove, Refrigerator and Range Hood with remote switches	1465		1,800.00				
TOTAL 6-05 WORK				<i>28,800.00</i>				
OR6-06 Cresview Villa Creswell OR	REMODEL ONE UNIT FOR '504 ACCESSIBILITY REQUIREMENTS: Interior and exterior renovation to establish disabled compliant kitchen and bath and other areas accessible for disabled residents.	1460	1 unit	45,000.00				
	Redesign of immediate front and rear entry walks and porches for accessibility	1450		3,500.00				
	Appliances suited best for accessibility needs (and based on Energy Star ratings): Stove, Refrigerator and Range Hood with remote switches.	1465		1,800.00				
TOTAL 6-06 WORK				<i>50,300.00</i>				
TOTAL PHYSICAL IMPROVEMENTS				<i>709,100.00</i>				

Annual Statement / Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) PART II: Supporting Pages								
PHA NAME: HOUSING & COMMUNITY SERVICES AGENCY OF LANE COUNTY		Grant Type and Number Capital Fund Program Grant No. OR16P006 501 05 Replacement Housing Factor Grant No.			Federal FY of Grant: <p style="text-align: center;">FY 05</p>			
Dev. No	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost Original	Revised	Total Actual Cost Obligated	Expended	Status of Work
MANAGEMENT IMPROVEMENTS	<u>Training:</u> Modernization Staff, including Architect, training as required.	1408		2,500.00				
	<u>Software:</u> Computer Software for new Computer purchase (see 1475)	1408		750.00				
	<u>Energy Auditor:</u> To create Public Housing Energy Audit Records, for up to one year, Agency will dedicate one half-time position of a Staff Auditor in the Weatherization Dept.to document PH unit conditions and energy source, and to recommend energy conservation measures. Records will establish reference basis for future energy related conservation improvements	1408		30,000.00				
	TOTAL 1408			<i>33,250.00</i>				
EQUIPMENT IMPROVEMENTS	<u>Equipment Purchases:</u> Production Copier: for preparing Modernization bid packages, for resident correspondence by Resident Services; and for document storage by scanning to computerized storage system. 1 Computer and 2 printers; update existing computer and printer; and add a new color printer for producing prints for documentation of inspections for the files and court proceedings.	1475		17,400.00				
	TOTAL 1475			<i>17,400.00</i>				

Annual Statement / Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) PART II: Supporting Pages							
PHA NAME: HOUSING & COMMUNITY SERVICES AGENCY OF LANE COUNTY		Grant Type and Number Capital Fund Program Grant No. OR16P006 501 05 Replacement Housing Factor Grant No.			Federal FY of Grant: <p style="text-align: center;">FY 05</p>		
Dev. No	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost Original Revised	Total Actual Cost Obligated Expended	Status of Work	
OPERATIONS TRANSFER	Transfer of Capital Funds to Operations (19.5%)	1406		256,013.80			
ADMINISTRATION OF GRANT	Staff salary and benefits for management of Capital Fund work (10%)	1410		129,299.90			
	Staff Architect salary and benefits for work related to Capital Fund work (exempt from 10%)	1410		81,000.00			
AUDIT FEES	Audit Fee directly related to Capital Fund work, as included in Agency annual audit.	1411		2,000.00			
FEES	Costs of non-Agency services directly related to work of this grant	1430		4,250.00			
TOTAL 1406, 1410, 1411, 1430				<i>472,563.70</i>			
RELOCATION	Relocation Services and expenses of residents as required to accomplish Capital Fund work.	1495		15,000.00			
CONTINGENCY	Allowance for Cost adjustments for this Capital Fund.(3.9%)	1502		45,685.30			
TOTAL GRANT				1,292,999.00			

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

PHA NAME: HOUSING & COMMUNITY SERVICES AGENCY OF LANE COUNTY		Grant Type and Number Capital Fund Program Grant No. OR16P006 501 5 Replacement Housing Factor Grant No.				Federal FY of Grant: FY 05	
Development No /Name / HA Wide Activities	All Funds Obligated (Quarter Ending Date)			All Fund Expended (Quarter Ending Date)			Reason for Revised Target Dates
OR6-01 Laurelwood Homes, Florence	8/17/2007			8/17/2009			
OR6-02 McKenzie Village, Springfield, OR	8/17/2007			8/17/2009			
OR6-05 Lindeborg Place, Junction City	8/17/2007			8/17/2009			
OR6-06 Cresview Villa, Creswell, OR	8/17/2007			8/17/2009			
Management Improvements	8/17/2007			8/17/2009			

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

PHA NAME: HOUSING AND COMMUNITY SERVICES AGENCY OF LANE COUNTY		<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No.			
Development Number/Name	Year 1	Work Statement for Year 2 FFY GRANT: 2006 PHA FY: 2006	Work Statement for Year 3 FFY GRANT: 2007 PHA FY: 2007	Work Statement for Year 4 FFY GRANT: 2008 PHA FY: 2008	Work Statement for Year 5 FFY GRANT: 2009 PHA FY: 2009
OR6-01 Laurelwood Homes		567,100	453,000	44,000	
OR6-02 McKenzie Village		145,000	154,000	260,000	145,000
OR6-04 Parkview Terrace			169,000		100,000
OR6-05 Lindeborg Place				50,000	45,000
OR6-06 Cresview Villa		36,500			74,500
OR6-07 Riverview Terrace				156,000	
OR6-15 Scattered Site				120,000	
OR6-17 Scattered Site					120,000
OR6-20 Scattered Site					120,000
OR6-23 Scattered Sites				120,000	140,400
<i>Total Physical Impr.</i>		<i>748,600</i>	<i>776,000</i>	<i>750,000</i>	<i>744,900</i>
<i>All Other expenses</i>		<i>544,399</i>	<i>516,999</i>	<i>542,999</i>	<i>548,099</i>
CFP Funds Listed for 5 Year Planning		1,292,999	1,292,999	1,292,999	1,292,999
Replacement Housing Factor Funds					

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

Activities Year 1	Activities for Year: 2006 FFY Grant: 2006 PHA FY:2006			Activities for Year: _07_ FFY Grant: 2007 PHA FY: 2007		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
	OR6-01 Laurelwood Homes	Reconstruction of 3 Units; Replace shop building; Improvements to Community Room	567,100.00	OR6-01 Laurelwood Homes	Final Stage of Reconstruction: three units	453,000.00
	OR6-02 McKenzie Village	Stage 2 - Sewer Drain Replacements (20 Units) Stage 2 - Sidewalk replacements	145,000.00	OR6-02 McKenzie Village	Kitchen and Bath Remodel, and asbestos flooring abatement - 3 units Stage 3 - Sewer Drain Replacements- 8 units Stage 3 - Sidewalk Replacements	154,000.00
				OR6-04 Parkview Terrace	Modernize 2 Elevators	169,000.00
	OR6-06/18 Cresview Villa	Sidewalk Replacements due to tripping hazards and tree uplift. Related Tree Removals	36,000.00			
		<i>TOTAL PHYSICAL IMPROVEMENTS</i>	<i>748,100.00</i>	<i>TOTAL PHYSICAL IMPROVEMENTS</i>		<i>776,000.00</i>
	MANAGEMENT IMPROVEMENTS	PH Equipment: Computers, printers, server cabling & switching improvements; digital cameras, fax machines	37,200.00	MANAGEMENT IMPROVEMENTS	PH Equipment: Computers, printers;terminal server improvements	13,000.00
		Mod Staff Training	2,500.00		Mod Staff Training	2,500.00
		Computer software	4,500.00		Computer software	2,250.00
	FEES	Audit fees for Cap Fund, Grant Fees and Sundries	7,000.00	FEES	Audit fees for Cap Fund, Grant Fees and Sundries	6,000.00
	ADMIN	A/E Services (staff)	81,000.00	ADMIN	A/E Services (staff)	81,000.00
		Administration (10%)	129,299.90		Administration (10%)	129,299.90
	OTHER	Relocation of Residents as required	9,000.00	OTHER	Relocation of Residents as required	9,000.00
		Contingency	18,385.30		Contingency	17,935.30
		Operations Transfer	256,013.80		Operations Transfer	256,013.80
	TOTAL CFP Estimated Cost		1,292,999.00			1,292,999.00

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

Activities Year 1	Activities for Year: <u>2008</u> FFY Grant: 2008 PHA FY:			Activities for Year: <u>2009</u> FFY Grant: 2009 PHA FY:		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
	OR6-01 Laurelwood Homes	FINAL WORK: Playground equipment and landscaping common areas around play ground and community building	44,000.00			
	OR6-02 McKenzie Village	Stage 4: Asbestos tile abatement and kitchen and bath remodels (4 units)	140,000.00	OR6-02 McKenzie Village	Stage 5: Asbestos tile abatement and kitchen & bath remodels (3 units)	105,000.00
		Stage 4: Sewer Drain Replacements (20 units), sidewalk replacements	120,000.00		Stage 5 (final): Sewer Drain Replacements (10 units), sidewalk replacements	40,000.00
	OR6-05 Lindeborg Place	Exterior Improvements; dry rot repair; paint	50,000.00	OR6-04 Parkview Terrace	Steam Boiler Conversion	100,000.00
	OR6-07 Riverview Terrace	Modernize Elevator	61,000.00	OR6-05 Lindeborg Place	Elevator Modernization	45,000.00
		Patio Door & window replacements	95,000.00	OR6-06 Cresview Villa	Replace attic water heaters Upgrade Furnaces	74,500.00
	OR6-15 Scattered Site	2060 Amirante, Eugene Comp Mod with '504 accessibility accommodations.	120,000.00	OR6-17 Scattered Site	1340 Aspen, Springfield; Comp Mod with 504 accomodations	120,000.00
	OR6-23 Scattered Site	870 E 36th Pl; Eugene Comp Mod with '504 accessibility accommodations	120,000.00	OR6-20 Scattered Sites	2702-04 Tomahawk, Eugene '504 Remodel (2702) and Exterior Building Improvements for duplex	120,000.00
				OR6-23 Scattered Sites	2240 VanBuren: Comp Mod 4010 Josh: Exterior Bldg improvements	140,400.00
	<i>TOTAL PHYSICAL IMPROVEMENTS</i>		<i>750,000.00</i>	<i>TOTAL PHYSICAL IMPROVEMENTS</i>		<i>744,900.00</i>

Annual Statement / Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPHF) Part I : Summary					
PHA Name: Housing and Community Services Agency of Lane Co.		Grant Type and Number Capital Fund Program Grant No. OR16P006501 03 Replacement Housing Factor Grant No.			Federal FY of Grant 2003 #1
<input type="checkbox"/> Original Annual Statement		<input type="checkbox"/> Reserve for Disasters/Emergencies		<input checked="" type="checkbox"/> Revised Annual Statement (Revision no: TWO)	
<input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending 3/31/05		<input type="checkbox"/>		Final Performance and Evaluation Report	
Line No	Summary of Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds				
2	1406 Operations	227,632.20	227,632.20	227,632.20	227,632.20
3	1408 Management Improvements	1,900.00	1,203.46	1,203.46	1,203.46
4	1410 Administration (10% Plus A/E fees)	181,316.10	171,004.09	171,004.09	171,004.09
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	4,000.00	2,501.37	2,501.37	2,501.37
8	1440 Site Acquisition				
9	1450 Site Improvement	75,550.00	95,717.37	95,717.37	95,717.37
10	1460 Dwelling Structures	647,062.70	639,199.26	639,199.26	639,199.26
11	1465.1 Dwelling Equipment - Nonexpendable	11,025.00	9,423.08	9,423.08	9,423.08
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	5,000.00	8,270.93	8,270.93	6,887.68
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation	8,300.00	8,209.24	8,209.24	7,097.45
18	1499 Development Activities				
19	1501 Collateralization or Debt Services				
20	1502 Contingency	1,375.00	-	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	1,163,161.00	1,163,161.00	1,163,161.00	1,160,665.96
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance	159,934.77	159,956.60	159,956.60	159,956.60
24	Amount of line 21 Related to Security - Soft Costs				
25	Amount of line 21 Related to Security - Hard Costs				
26	Amount of line 21 Related to Energy Conservation		27,496.05	27,496.05	27,496.05

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

PHA NAME: HOUSING AND COMMUNITY SERVICES AGENCY OF LANE CO		Grant Type and Number Capital Fund Program Grant No. OR16P006501 03 Replacement Housing Factor Grant No.				Federal FY of Grant: 2003		
Dev. No	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost Original	Revised	Total Actual Cost Obligated	Expended	Status of Work
Agency wide	Transfer Funds to PH Operations	1406		227,632.20	227,632.20	227,632.20	227,632.20	Complete
Administration of Grant	Administration: Staff supervision and contract administration by Staff	1410	5-6 staff	116,316.10	116,316.10	116,316.10	116,316.10	Expended
	A/E Services - Staff (Not subject to 10% limitation)	1410		65,000.00	54,687.99	54,687.99	54,687.99	Expended
Fees and Sundries	Advertising for Bids, A/E and project manual printing and supplies; Environmental Review Fees	1430		4,000.00	2,501.37	2,501.37	2,501.37	Expended
Management Improvements	Resident Advisory Group - Reimbursement for mileage and child care to meeting for Capital Fund Review	1408	20 people	-	-			Paid by Resident Services grant
	Modernization Staff Training	1408	5 Staff	600.00	140.00	140.00	140.00	Expended
	Software improvements: File Server storage and back up; other upgrades as related	1408		500.00	-	-	-	Operations Funding Used
	File server, computers and printers as required to maintain quality & timely services by Staff.	1475		5,000.00	8,270.93	8,270.93	6,887.68	80% complete
	Maintenance Department Tools as required for maintenance of upgraded equipment	1408		800.00	1,063.46	1,063.46	1,063.46	Expended
PAGE TOTAL				419,848.30	410,612.05	410,612.05	409,228.80	

Annual Statement / Performance and Evaluation Report								
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)								
PART II: Supporting Pages								
PHA NAME: HOUSING AND COMMUNITY SERVICES AGENCY OF LANE CO			Grant Type and Number Capital Fund Program Grant No. OR16P006501 03 Replacement Housing Factor Grant No.			Federal FY of Grant: 2003		
Dev. No	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost Original	Revised	Total Actual Cost Obligated	Expended	Status of Work
PHYSICAL IMPROVEMENTS								
OR6-01	Total rehabilitation of units - Stage 3 of 6.							
Laurelwood Homes Florence, OR	Asbestos abatement; replacement of all cabinets & counters, flooring, windows, reconfigure unit for live ability, doors, insulation. Exterior siding, roof. Improvements to sidewalks, driveways, and landscaping. <i>Added Underground Utility work required by City from street to buidlings</i>	1460	5 units	471,252.93	461,762.08	461,762.08	461,762.08	Complete
		1450	5 units	50,500.00	70,539.37	70,539.37	70,539.37	Complete
	Install all new appliances.	1465	5 units	7,400.00	5,800.90	5,800.90	5,800.90	Complete
			Site Total	<i>529,152.93</i>	<i>529,152.93</i>	<i>529,152.93</i>	<i>529,152.93</i>	
OR6-02,03								
McKenzie Village, Springfield, OR	504 accessibility remodel in one unit, remodel interior for physical accessibility including kitchen and bath; abate asbestos floor tile. <i>(#6 & 7 of 9 planned)</i>	1460	2 Units	130,809.77	131,156.42	131,156.42	131,156.42	Complete
	Replace stove, refrigerator and range hood adapted for use by a disabled resident	1465	2 Units	3,625.00	3,622.18	3,622.18	3,622.18	Complete
	Install ramps and rails for access to unit.	1450	2 Units	25,500.00	25,178.00	25,178.00	25,178.00	Complete
			Site Total	<i>159,934.77</i>	<i>159,956.60</i>	<i>159,956.60</i>	<i>159,956.60</i>	
OR6-04								
Parkview Terrace	Improve kitchen / bath ventilation which runs to a roof-top ventilation system. Replace motors and fans for all units. Seal system for leaks.	1460	150 Units	45,000.00	46,280.76	46,280.76	46,280.76	Completed by Force Acct. <i>(very successful)</i>
	<i>Physical Improvement totals</i>			<i>734,087.70</i>	<i>735,390.29</i>	<i>735,390.29</i>	<i>735,390.29</i>	
TOTAL PAGE						734,087.70	744,339.71	744,339.71

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

PART II: Supporting Pages

PHA NAME: HOUSING AND COMMUNITY SERVICES AGENCY OF LANE CO		Grant Type and Number Capital Fund Program Grant No. OR16P006501 03 Replacement Housing Factor Grant No.				Federal FY of Grant: 2003		
Dev. No	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost Original Revised		Total Actual Cost Obligated Expended		Status of Work
OTHER:								
	RELOCATION: Expenses associated with relocating residents during OR6-01 Laurelwood work, and OR6-02 accessibility remodels.	1495.1	9 units	8,300.00	8,209.24	8,209.24	7,097.45	1 return move in progress.
	CONTINGENCY	1502		1,375.00	-	-	-	All transferred within this grant
	TOTAL PAGE			9,675.00	8,209.24	8,209.24	7,097.45	
	TOTAL GRANT			1,163,611.00	1,163,161.00	1,163,161.00	1,160,665.96	

Annual Statement / Performance and Evaluation Report							
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)							
PART III: Implementation Schedule							
PHA NAME: HOUSING & COMMUNITY SERVICES AGENCY OF LANE CO.		Grant Type and Number Capital Fund Program Grant No. OR16P006501 03 Replacement Housing Factor Grant No.				Federal FY of Grant: 2003	
Development No /Name / HA Wide Activities	All Funds Obligated (Quarter Ending Date)			All Fund Expended (Quarter Ending Date)			Reason for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
MANAGEMENT IMPROVEMENTS	9/30/2005			3/30/2006			
PHYSICAL IMPROVEMENTS							
OR6-01 Laurelwood Homes, Florence OR	9/30/2005		6/30/2004	9/30/2006		12/30/2004	
OR6-02,3 McKenzie Village, Springfield	6/30/2004		3/30/2004	3/30/2005		9/30/2004	
OR6-04 Parkview Terrace, Eugene	9/30/2004		9/30/2004	12/30/2006		12/30/2004	

Annual Statement / Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPHF) Part I : Summary					
PHA Name: Housing and Community Services Agency of Lane Co.		Grant Type and Number OR16P006 502 03 Capital Fund Program Grant No. FY03 Replacement Housing Factor Grant No.			Federal FY of Grant FY03 #02
<input type="checkbox"/> Original Annual Statement Reserve for Disasters/Emergencies		<input checked="" type="checkbox"/> Revised Annual Statement (Revision No: ONE)			
<input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending 3/31/05		<input type="checkbox"/> Final Performance and Evaluation Report			
Line No	Summary of Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds	50,000.00	39,000.00	3,900.00	3,900.00
2	1406 Operations	46,362.60	46,362.60	46,362.60	46,362.60
3	1408 Management Improvements	-	-	-	-
4	1410 Administration (includes A/E)	29,981.30	31,114.09	31,114.09	20,515.34
5	1411 Audit				
6	1415 Liquidated Damages	-			
7	1430 Fees and Costs	900.00	1,648.41	1,648.41	1,648.41
8	1440 Site Acquisition	-			
9	1450 Site Improvement	24,500.00	22,274.50	22,274.50	22,274.50
10	1460 Dwelling Structures	125,000.00	126,729.34	121,176.49	94,176.49
11	1465.1 Dwelling Equipment - Nonexpendable	3,800.00	3,684.06	1,684.06	1,684.06
12	1470 Nondwelling Structures	-		-	-
13	1475 Nondwelling Equipment	-		-	-
14	1485 Demolition	-		-	-
15	1490 Replacement Reserve	-		-	-
16	1492 Moving to Work Demonstration	-		-	-
17	1495.1 Relocation	-		-	-
18	1499 Development Activities	-		-	-
19	1501 Collaterization or Debt Services	-		-	-
20	1502 Contingency	1,269.10	-	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	231,813.00	231,813.00	224,260.15	186,661.40
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance	\$ 26,200.00	30,253.99	30,253.99	30,253.99
24	Amount of line 21 Related to Security - Soft Costs	0			
25	Amount of Line 21 Related to Security - Hard Costs	0			
26	Amount of Line 21 Related to Energy Conservation	0	3,150.00	3,150.00	1,758.00

Annual Statement / Performance and Evaluation Report								
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)								
PART II: Supporting Pages								
PHA NAME: HOUSING AND COMMUNITY SERVICES AGENCY OF LANE COUNTY			Grant Type and Number: MODERNIZATION Capital Fund Program Grant No. OR16P006 502 03 Replacement Housing Factor Grant No.			Federal FY of Grant: FY 03 #2		
Dev. No	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost Original Revised		Total Actual Cost Obligated Expended		Status of Work
OR6-01 Laurelwood Homes	Reconstruction of one unit of a duplex	1460	1	100,000.00	73,073.84	73,073.84	73,073.84	COMPLETE
	Site work, including under ground electrical requirements	1450		9,500.00	13,314.75	13,314.75	13,314.75	COMPLETE
	Appliances for one unit (hood, stove, refer)	1465		1,150.00	-	-	-	FY03#1 funded
<i>6-01 Project Total</i>				<i>110,650.00</i>	<i>86,388.59</i>	<i>86,388.59</i>	<i>86,388.59</i>	
OR6-02 McKenzie Village	504 remodel; to add accessibility accommodations to one unit being reconstructed due to fire damage.	1460	1	10,000.00	19,610.18	19,610.18	19,610.18	COMPLETE
	Add '504 exterior access and ramps to unit to be reconstructed due to fire damage.	1450		15,000.00	8,959.75	8,959.75	8,959.75	
	Appliances especially for the accessibility 504 remodel, remote hood, side-by-side refer, and wall oven.	1465		1,500.00	1,684.06	1,684.06	1,684.06	
OR6-02 McKenzie Village	Remodel Kitchen and Bath, abate asbestos pipe wrap and flooring; replace abated vinyl flooring	1460	1	15,000.00	34,045.32	28,492.47	1,492.47	In Progress
	Appliances for one unit (hood, stove, refer)	1465		1,150.00	2,000.00	-	-	
<i>6-02 Project Total</i>				<i>42,650.00</i>	<i>66,299.31</i>	<i>58,746.46</i>	<i>31,746.46</i>	
Architect and Engineering Services	Staff Architect Drawings for funded work (exempt from 10%)	1410		6,800.00	7,932.79	7,932.79	422.73	
Administration Agency staff	Agency Staff salaries and benefits for management of grant and work items	1410		23,181.30	23,181.30	23,181.30	20,092.61	
Fees/Sundries	Advertising and printing of plans for work	1430		900.00	1,648.41	1,648.41	1,648.41	
Contingency	Contingency funds for work items (3%)	1502		1,269.10	-	-	-	
Transfer	Transfer to Operations (20%)	1406		46,362.60	46,362.60	46,362.60	46,362.60	
TOTAL				231,813.00	231,813.00	224,260.15	186,661.40	

Annual Statement / Performance and Evaluation Report

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

PHA Name: Housing and Community Services Agency of Lane Co.	Grant Type and Number: Capital Fund Program Capital Fund Program Grant No. OR16P006 501 04 Replacement Housing Factor Grant No.	Federal FY of Grant 2004
---	---	------------------------------------

- Original Annual Statement Reserve for Disasters/Emergencies
 Revised Annual Statement (Revision no: ONE)
- Performance and Evaluation Report for Period Ending **3/31/05**
 Final Performance and Evaluation Report

Line No	Summary of Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds				
2	1406 Operations	262,677.09	262,677.09	262,677.09	262,677.09
3	1408 Management Improvements	4,750.00	4,750.00	243.53	-
4	1410 Administration * Includes A/E	206,804.20	206,804.20	206,804.20	78,374.24
5	1411 Audit		1,500.00	1,500.00	1,500.00
6	1415 Liquidated Damages				
7	1430 Fees and Costs	5,000.00	5,000.00	1,419.19	1,314.28
8	1440 Site Acquisition				
9	1450 Site Improvement	189,000.00	189,000.00	13,425.00	11,375.00
10	1460 Dwelling Structures	522,400.00	540,400.00	204,483.04	133,984.46
11	1465.1 Dwelling Equipment - Nonexpendable	95,500.00	95,500.00	1,324.00	-
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	22,500.00	23,707.00	4,456.99	3,916.99
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation	14,000.00	14,000.00	316.00	316.00
18	1499 Development Activities				
19	1501 Collaterization or Debt Services				
20	1502 Contingency	24,430.71	3,723.71	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	1,347,062.00	1,347,062.00	696,649.04	493,458.06
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance	71,900.00			
24	Amount of line 21 Related to Security - Soft Costs				
25	Amount of Line 21 Related to Security - Hard Costs				
26	Amount of Line 21 Related to Energy Conservation	45,000.00			



Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

PART II: Supporting Pages

PHA NAME: Housing & Community Services Agency of Lane County		Grant Type and Number Capital Fund Program Grant No. OR16P006 501 04 Replacement Housing Factor Grant No.				Federal FY of Grant: 2004		
Dev.No.	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost Original	Revised	Total Actual Cost Obligated	Expended	Status of Work
OR6-01 Laurelwood Homes Florence OR	Reconstruction of entire unit: Units interior & exterior (on-going project) 4 units (totals 20 units of 30)	1460	4	386,400.00	404,400.00	204,483.04	133,984.46	2 of 4 units to be completed in April 2005 other 2 in Fall '05
	Site Improvements;underground utilities, shrub beds, concrete edges, walks & plantings	1450	4	48,000.00	48,000.00	13,425.00	11,375.00	
	Appliances: Stove and Vent Fan, Refrigerators	1465	4	5,600.00	5,600.00	1,324.00	0.00	
<i>OR6-01 Project Total</i>				<i>440,000.00</i>	<i>458,000.00</i>	<i>219,232.04</i>	<i>145,359.46</i>	
OR6-02 McKenzie Village Springfield, OR	Remodel of one unit for '504 accessibility requirements - building interior	1460	1	54,000.00	54,000.00	0.00	0.00	Not yet
	New sloped sidewalks, and related site work for wheel chair access to unit	1450	1	16,000.00	16,000.00	0.00	0.00	Scheduled
	Appliances specialized in accessible use	1465	1	1,900.00	1,900.00	0.00	0.00	
	Asbestos abatement with flooring replacement; kitchen and bath remodel (on going work)	1460	2	54,000.00	54,000.00	0.00	0.00	To be done when vacates available in Winter 2006
	Replace water and sewer drain line and clean out from building to street	1450	2	5,000.00	5,000.00	0.00	0.00	
Appliances for kitchen remodel work	1465	2	4,000.00	4,000.00	0.00	0.00		
<i>OR6-02 Project Total</i>				<i>134,900.00</i>	<i>134,900.00</i>	<i>0.00</i>	<i>0.00</i>	
OR6-05 Lindborg Place Junction City OR	Upgrade kitchen: Replace refrigerators, stove tops and wall ovens, including counters and kitchen sink	1460	40	28,000.00	28,000.00	0.00	0.00	Planned for late Summer 2005
	Appliances for kitchen upgrade	1465	40	84,000.00	84,000.00			
<i>OR6-05 Project Total</i>				<i>112,000.00</i>	<i>112,000.00</i>	<i>0.00</i>	<i>0.00</i>	
PAGE TOTAL				686,900.00	704,900.00	219,232.04	145,359.46	

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

PART II: Supporting Pages

PHA NAME: Housing & Community Services Agency of Lane County		Grant Type and Number Capital Fund Program Grant No. OR16P006 501 04 Replacement Housing Factor Grant No.				Federal FY of Grant: 2004		
Dev.No.	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost Original	Revised	Total Actual Cost Obligated	Expended	Status of Work
OR6-07 Riverview Terrace, Cottage Grove, OR	Improve existing parking area and add parking area with access from Main Street.	1450		120,000.00	120,000.00	0.00	0.00	Out to Bid in August 2005
TOTAL PHYSICAL IMPROVEMENTS				806,900.00	824,900.00	219,232.04	145,359.46	
MANAGEMENT IMPROVEMENTS								
	Maintenance Department Radio Communication System Upgrade: to purchase new hand held radios so staff can communicate outside Eugene-Springfield Metro area, to Veneta, Junction City, Creswell and Cottage Grove.	1475		10,000.00	12,050.01	0.00	0.00	Quotes in Progress
	Purchase Postal processing equipment to meet new Postal Dept imprint requirements.	1475	1	5,300.00	4,456.99	4,456.99	3,916.99	Purchased 12/04
	Computers and printers; to maintain adequate condition of computers and printers for efficient use of staff. Replacement scheduled in stages.	1475	3 ea	7,200.00	7,200.00	0.00	0.00	
	<i>Total 1475</i>			<i>22,500.00</i>	<i>23,707.00</i>	<i>4,456.99</i>	<i>3,916.99</i>	
	Modernization Staff Training and Architect certification requirements.	1408	4	2,500.00	2,500.00	243.53	0.00	
	Software requirements for new computers purchased with this grant	1408	3	2,250.00	2,250.00	0.00	0.00	
	<i>Total 1408</i>			<i>4,750.00</i>	<i>4,750.00</i>	<i>243.53</i>	<i>0.00</i>	
PAGE TOTAL				147,250.00	148,457.00	4,700.52	3,916.99	

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

PART II: Supporting Pages

PHA NAME: Housing & Community Services Agency of Lane County		Grant Type and Number Capital Fund Program Grant No. OR16P006 501 04 Replacement Housing Factor Grant No.				Federal FY of Grant: 2004		
Dev.No.	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost Original	Revised	Total Actual Cost Obligated	Expended	Status of Work
OTHER:								
	Transfer to Operations (19.5%)	1406		262,677.09	262,677.09	262,677.09	262,677.09	
	Administration of Grant	1410		134,706.20	134,706.20	134,706.20	67,002.76	
	Architect & Engineering Services	1410		72,098.00	72,098.00	72,098.00	11,371.48	
	Audit Fees - (New budget line)	1411		0.00	1,500.00	1,500.00	1,500.00	
	Sundries: printing and supplies, etc.	1430		5,000.00	5,000.00	1,419.19	1,314.28	
	Expenses related to Relocation of residents when required by work.	1495		14,000.00	14,000.00	316.00	316.00	
	Contingency (3%)	1502		24,430.71	3,723.71	0.00	0.00	
	<i>Total Other:</i>			<i>512,912.00</i>	<i>493,705.00</i>	<i>472,716.48</i>	<i>344,181.61</i>	
	TOTAL GRANT - FY04			1,347,062.00	1,347,062.00	696,649.04	493,458.06	

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

PART III: Implementation Schedules

PHA NAME: HACSA of Lane County		Grant Type and Number Capital Fund Program Grant No. OR16P006 501 04 Replacement Housing Factor Grant No.					Federal FY of Grant: FY 04	
	All Funds Obligated (Quarter Ending Date)			All Fund Expended (Quarter Ending Date)			Reason for Revised Target Dates	
	ORIGINAL	REVISED	ACTUAL	ORIGINAL	REVISED	ACTUAL		
OR6-01 Laurelwood Homes	9/13/2006			9/13/2008				
OR6-02 McKenzie Village	9/13/2006			9/13/2008				
OR6-05 Lindeborg Place	9/13/2006			9/13/2008				
OR6-07 Riverview Terrace	9/13/2006			9/13/2008				
Equipment under 1475 Account	9/13/2006			9/13/2008				
Software and Training in 1408	9/13/2006			9/13/2008				

HACSA certifies that it has completed an initial review of all of its public housing developments, that are for general occupancy, to determine if it is feasible to converting them to tenant-based assistance. HACSA has concluded that these general occupancy developments should not be converted at this time. In making this determination, HACSA has concluded that it would be more expensive than continuing to operate the developments as public housing, and that the conversion would not principally benefit residents or the community, and any such conversion would adversely affect the availability of affordable housing in these various communities.

Component 10 (B) Voluntary Conversion Initial Assessments

How many of the PHA's developments are subject to the Required Initial Assessments?

Nine.

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)?

Six.

SUBSTANTIAL DEVIATIONS
TO THE AGENCY'S ANNUAL PLAN

OCTOBER 1, 2005 - SEPTEMBER 30, 2006

Substantial Deviations are defined as deviations to the annual plan that would require the Agency to seek public comment on the proposed changes.

1. Changes to Section 8 or Public Housing Admission Policies.
2. Significant dollar or work item changes to Comp Grant (Capital Fund). Significant dollar change to be defined as more than 10% of the total annual grant. Moving a work item from one year to another will not be considered a significant change even if that change produces a dollar change over 10%.
3. Three or more findings on the Agency audit.
4. Any change with regard to demolition or disposition, designation, homeownership programs, or conversion activities.

**IN THE BOARD OF COUNTY COMMISSIONERS
OF LANE COUNTY, OREGON**

ORDER NO.

02-4-17-3

**)In the Matter of
Appointing Two)Resident
Commissioners to the
)HACSA Board of
Commissioners**

WHEREAS, ORS 456.095 (1)(b) requires the appointment of at least one but no more than two resident commissioners; and

WHEREAS, a direct solicitation was made to all public housing residents, and applications were reviewed; and

WHEREAS, the Board recommends that two resident commissioners be appointed to the HACSA Board of Commissioners

NOW THEREFORE, IT IS HEREBY ORDERED that the following named persons be appointed as the HACSA Board resident Commissioners.

<u>NAME</u>	<u>TERM</u>
<u>June Gallagher</u>	<u>2 years</u> *
<u>Judith Pothier</u>	<u>4 years</u>

***Term expired 1/04. Hugh Massengill appointed 1/04 to a 4 year term.**

DATED this 17th day of April, 2002.

Chair, Lane County Board of Commissioners

In the Matter of Appointing Two Resident Commissioners to the HACSA Board of Commissioners

PASSED

IN THE BOARD OF COUNTY COMMISSIONERS
OF LANE COUNTY, OREGON

ORDER NO.
04-1-14-1

In the Matter of Appointing a
Resident Commissioner to the
HACSA Board of Commissioners

WHEREAS, the HACSA By-Laws require the appointment of two resident commissioners;
and

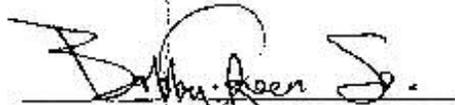
WHEREAS, the term of one resident commissioner is expiring; and

WHEREAS, a direct solicitation was made to all public housing residents, and applications

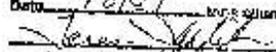
WHEREAS, the Board recommends that the following resident commissioner be appointed
to the HACSA Board of Commissioners

NOW THEREFORE, IT IS HEREBY ORDERED that HUGL MASSENGILL
be appointed to the HACSA Board for a term of four years with that term expiring in January of
2008.

DATED this 14th day of January, 2004.


Chair, Lane County Board of Commissioners

In the Matter of Appointing a Resident Commissioner to the HACSA Board of Commissioners

APPROVED AS TO FORM
Date 1/21/04

OFFICE OF LEGAL COUNSEL

Complex	Representative	Alternate Representative
Laurelwood Homes	Frances Webster 1083 Maple (PO Box 2545) Florence 97439 - Ph: 541/997-7683	-Vacant-
McKenzie Village	Nan Southerland 1695 Kelly St Springfield 97477 - Ph: 747-1598	Anna Webb 1441 McPherson Springfield 97477 - Ph: 741-8808
Parkview Terrace	Catherine Southward 255 High St # 435 Eugene 974012 - Ph: 334-6554	-Vacant-
Lindeborg Place	Amy Feinberg 840 Holly Street #116 Junction City 97448 Ph: 998-6857 Cell: 510-0554 amy_mf1@yahoo.com	-Vacant-
Cresview Villa	-Vacant-	-Vacant-
Riverview Terrace	Ray Dean 925 W Main St. #106 Cottage Grove 97424 - Ph: 942-4683	Michelle Thurston 925 W Main #204 Cottage Grove 97424 - Ph: 767-9770 michellethurston2003@yahoo.com
Pengra Court	-Vacant-	-Vacant-
Scattered Sites	-Vacant-	-Vacant-
Maple Wood Meadows	-Vacant-	-Vacant-
Veneta	Cathy Ramsey 24923 Dunham Avenue (PO Box 94) Veneta 97487 - Ph: 935-0866 ramseycas@aol.com	Cathy Ramsey 24923 Dunham Avenue (PO Box 94) Veneta 97487 - Ph: 935-0866 ramseycas@aol.com
Village Oaks	Suzanne Birnkrant 3608 W 18 th #8 Eugene 97402 - Ph: 343-3854 sbrnkrant@yahoo.com	Cheryl Kiser 3616 W 18 th #3 Eugene 97402 - Ph: 606-5739
Abbie Lane Courts	Travis Austin 1011 Abbie Lane # 10 Eugene 97401 - Ph: 343-5394	-Vacant-
Fourteen Pines	Greg Ewert 2826 Willakenzie Eugene 97401 - Ph: 685-9097 fourteenpines@eugenekidsclub.org	-Vacant-
TAG Treasurers	Nan Southerland 1695 Kelly St Springfield 97477 - Ph: 747-1598	Suzanne Birnkrant 3608 W 18 th #8 Eugene, OR 97402 - Ph: 343-3854
Resident Commissioners	Hugh Massengill 255 High St #313 Eugene 97401 - Ph: 682-3410 h.massengill@comcast.net	Judith Pothier 135 W Olympic Springfield 97477 - Ph: 682-3409 Fax: 741-3332 pothier_innovations@msn.com

The Tenant Advisory Group (TAG) has been designated as the HACSA Resident Advisory Board (RAB) for Agency Plan purposes.

Component 3, (6) Deconcentration and Income Mixing

- a. X 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. X Yes No: Do any of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments? If no, this section is complete.

If yes, list these developments as follows:

Deconcentration Policy for Covered Developments			
Development Name:	Number of Units	Explanation (if any) [see step 4 at §903.2(c)(1)(iv)]	Deconcentration policy (if no explanation) [see step 5 at §903.2(c)(1)(v)]
6-16	22	Scattered site housing	
6-17	27	Scattered site housing	
6-20	20	Scattered site housing	
6-23	40	Scattered site housing	