

PHA Plans

Streamlined 5-Year/Annual Version

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

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

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

Streamlined 5-Year Plan for Fiscal Years 2005- 2009

Streamlined Annual Plan for Fiscal Year 2005

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

Streamlined Five-Year PHA Plan Agency Identification

PHA Name: Central Oregon Regional Housing Authority **PHA Number:** OR034

PHA Fiscal Year Beginning: 07/2005

PHA Programs Administered:

- Public Housing and Section 8** **Section 8 Only** **Public Housing Only**
Number of public housing units: **48** Number of S8 units: Number of public housing units:
Number of S8 units: **1003**

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

Public Access to Information

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

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

Display Locations For PHA Plans and Supporting Documents

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

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

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

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

Streamlined Five-Year PHA Plan

PHA FISCAL YEARS 2005 - 2009

[24 CFR Part 903.12]

A. Mission

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

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- The PHA's mission is: *"Fostering Dignity through Affordable Housing"*

B. Goals

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

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

- 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
- Increase voucher homeownership program:
- Implement public housing or other homeownership programs:
- Implement public housing site-based waiting lists:
- Convert public housing to vouchers:
- Other: (list below)

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

PHA Goal: Provide an improved living environment

Objectives:

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

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

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

Objectives:

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

Provide access, through community partners' supportive services; savings accounts (IDAs), post High School training and education opportunities, preparation for homeownership

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

PHA Goal: Ensure equal opportunity and affirmatively further fair housing

Objectives:

- Undertake affirmative measures to ensure access to assisted housing regardless of

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

Other PHA Goals and Objectives: (list below)

Goal One: Develop affordable housing programs through a dynamic strategic planning process.

Objective 1: Strategic Planning process.

Continue to update and revise a dynamic business plan that incorporates the strategic plan.

Objective 2: Continue proaction in community issues by utilizing current data and diagnostic tools for future housing units.

Objective 3: Expand resources of existing programs and fund additional units and related programs.

Objective 4: Increase the number of Housing Choice Vouchers.

Objective 5: Continue growth and participation of Homeownership Program

Objective 6: Continue to submit applications and secure funding for development projects.

Objective 7: Continue to develop approved and funded projects.

Objective 8: Convert Public Housing units from HUD properties to CORHA properties.

Goal Two: Create opportunities for residents to break the cycle of poverty.

Objective 1: Continue development and implementation of resident programs on CORHA-controlled properties

Objective 2: Continue development of 'self-sufficiency program model' for participation by individuals/families on a matching dollar basis.

Goal Three: Create increased public awareness of CORHA, its mission and programs, and the community's need for affordable housing.

Objective 1: Continue development of public relations and marketing strategies.

Objective 2: Increase the number of community presentations for educational awareness of CORHA's programs, goals and current projects.

Objective 3: Increase management team involvement in community organizations (i.e. Service Clubs, Non-profit boards, Chambers of Commerce and others as appropriate).

Goal Four: Leverage influence of the Board of Commissioners to further CORHA's mission and goals to create affordable housing.

Objective 1: Continue engagement of Commissioners in key political opportunities on local, state & national basis.

Objective 2: Continue Board engagement in CORHA programs and activities.

Objective 3: Maintain calendar of Board participation opportunities.

Goal Five: Recruit/retain staff that demonstrates professional integrity and commitment to the mission of the organization.

Objective 1: Continue to evaluate and meet training needs for professional development of staff.

Objective 2: Monitor budget development & accountability systems to ensure efficiency and fiscal accountability.

Objective 3: Measure all staff performance under "pay for performance" system as adopted by BOD.

Objective 4: Continue ensuring comparable wages for all positions.

Streamlined Annual PHA Plan

PHA Fiscal Year 2005

[24 CFR Part 903.12(b)]

Table of Contents

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

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B. SEPARATE HARD COPY SUBMISSIONS TO LOCAL HUD FIELD OFFICE

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

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

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

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

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

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

Executive Summary (optional)

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

Central Oregon Regional Housing Authority is submitting an updated 5-year plan, which incorporates the annual plan and considers the housing needs for low income families residing in Central Oregon communities. Central Oregon Regional Housing Authority continues to evolve, improve and implement strategies to serve our communities by “*Fostering Dignity through Affordable Housing.*”

The updated Annual Plan includes the following strategies to expand the supply of assisted housing, acquire, or build new housing units and improve the quality of affordable housing in Central Oregon:

- Central Oregon Regional Housing Authority will apply for additional rental vouchers.
- Increase public awareness of the need for additional affordable housing opportunities and low income families services.
- Leverage private or other public funds to create additional housing opportunities.
- Promote self-sufficiency and asset development of families and individuals.
- Provide or attract supportive services to improve employability for families and individuals.
- Provide or attract Resident services to improve quality of life for families and individuals.

Other major elements of the updated Annual Plan which constitutes the substance of the 5-Year plan and the related goals toward achieving our objectives include:

- Renovate or modernize public housing and CORHA owned housing units.
- Work with local and state housing agencies to utilize all available resources for the development or rehabilitation of new or existing affordable housing.
- Continue to develop and promote homeownership opportunities for low and moderate income families and individuals.

Central Oregon Regional Housing Authority will continue to carry on all such activities and promote the availability of affordable housing stock, and support independent living and asset building of all low income residents residing in Central Oregon.

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

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

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

| Housing Needs of Families on the PHA's Public Housing Waiting Lists | | | |
|--|---------------|---------------------|-----------------|
| Waiting list type: (select one) | | | |
| <input type="checkbox"/> Section 8 tenant-based assistance | | | |
| <input checked="" type="checkbox"/> Public Housing | | | |
| <input type="checkbox"/> Combined Section 8 and Public Housing | | | |
| <input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional) | | | |
| If used, identify which development/subjurisdiction: | | | |
| | # of families | % of total families | Annual Turnover |
| Waiting list total | 30 | | |
| Extremely low income <=30% AMI | 26 | | |
| Very low income (>30% but <=50% AMI) | 4 | | |
| Low income (>50% but <80% AMI) | 0 | | |
| Families with children | 21 | | |
| Elderly families | 0 | | |
| Families with Disabilities | 7 | | |
| Race/ethnicity White | 30 | 100% | |
| Race/ethnicity | | | |
| Race/ethnicity | | | |
| Race/ethnicity | | | |
| Characteristics by Bedroom Size (Public Housing Only) | | | |
| 1BR | 10 | | |
| 2 BR | 11 | | |
| 3 BR | 8 | | |
| 4 BR | 1 | | |
| 5 BR | | | |
| 5+ BR | | | |
| Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes | | | |
| If yes: | | | |
| How long has it been closed (# of months)? 18 | | | |
| Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes | | | |
| Does the PHA permit specific categories of families onto the waiting list, even if generally closed? | | | |
| <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | | | |

Housing Needs of Families on the Section-8 tenant-based Waiting Lists

Waiting list type: (select one)

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

| | # of families | % of total families | Annual Turnover |
|---|---------------|---------------------|-----------------|
| Waiting list total | 161 | | |
| Extremely low income <=30% AMI | 117 | 73% | |
| Very low income (>30% but <=50% AMI) | 42 | 26% | |
| Low income (>50% but <80% AMI) | 2 | 1% | |
| Families with children | 110 | 68% | |
| Elderly families | 11 | 7% | |
| Families with Disabilities | 48 | 30% | |
| Race/ethnicity | 7 | 4% | |
| Race/ethnicity | 2 | 1% | |
| Race/ethnicity | 2 | 1% | |
| Race/ethnicity | 0 | | |

| Characteristics by Bedroom Size (Public Housing Only) | | | |
|---|--|--|--|
| 1BR | | | |
| 2 BR | | | |
| 3 BR | | | |
| 4 BR | | | |
| 5 BR | | | |
| 5+ BR | | | |

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

If yes:

How long has it been closed (# of months)? **4**

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

B. Strategy for Addressing Needs

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

Continue to provide up to date resource materials and referrals to area services provided through partnership agreements.

Also, see CORHA goals and Objectives page 4.

(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)
See CORHA goals and Objectives page 4.

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

Select all that apply

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

- Other: (list below)
See CORHA goals and Objectives page 4.

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)
Maintain rent policies that support and encourage work

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)
- See CORHA goals and Objectives page 4.*

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)
- Periodically test market to determine if groups are underserved.*

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)
- N/A*

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)
- See CORHA goals and Objectives page 4.*

2. Statement of Financial Resources

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

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

| Financial Resources: Planned Sources and Uses | | |
|---|---------------------|---------------------------|
| Sources | Planned \$ | Planned Uses |
| 1. Federal Grants (FY 2005 grants) | | |
| a) Public Housing Operating Fund | 135,726.00 | |
| b) Public Housing Capital Fund | 115,000.00 | |
| c) HOPE VI Revitalization | n/a | |
| d) HOPE VI Demolition | n/a | |
| e) Annual Contributions for Section 8 Tenant-Based Assistance | 5,655,142.00 | |
| f) Resident Opportunity and Self-Sufficiency Grants | 39,996.00 | |
| g) Community Development Block Grant | 0 | |
| h) HOME | 0 | |
| Other Federal Grants (list below) | | |
| | | |
| 2. Prior Year Federal Grants (unobligated funds only) (list below) | | |
| | | |
| | | |
| | | |
| 3. Public Housing Dwelling Rental Income | 100,000.00 | Public Housing Operations |
| | | |
| | | |
| 4. Other income (list below) | | |
| Interest | 50.00 | Public Housing Operations |
| Vending | 1,000.00 | Public Housing Operations |
| 4. Non-federal sources (list below) | | |
| Development & maintenance | 100,000.00 | Asset Management |
| Multi-family and other projects | 681,000.00 | Operations (rental units) |
| Asset Management Fees | 30,000.00 | Admin Expense |
| Total resources | 6,857,914.00 | |
| | | |

3. PHA Policies Governing Eligibility, Selection, and Admissions

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

A. Public Housing

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

(1) Eligibility

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

- When families are within a certain number of being offered a unit: (state number)
 When families are within a certain time of being offered a unit: < ***1 month***
 Other: (describe)

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

- Criminal or Drug-related activity
 Rental history
 Housekeeping
 Other : ***Happy Tenant screening to determine if family has previously been evicted from Public Housing or outstanding debt to a PHA. Also, personal references.***

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

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

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

(2)Waiting List Organization

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

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

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

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

c. Site-Based Waiting Lists-Previous Year

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

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

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

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

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

d. Site-Based Waiting Lists – Coming Year

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

(3) Assignment

1. How many site based waiting lists will the PHA operate in the coming year? **0**

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

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

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

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

(3) Assignment

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

- One
- Two
- Three or More

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

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

(4) Admissions Preferences

a. Income targeting:

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

b. Transfer policies:

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

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

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

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

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

- Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

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

4. Relationship of preferences to income targeting requirements:

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

(5) Occupancy

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

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

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

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

(6) Deconcentration and Income Mixing

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

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

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

B. Section 8

Exemptions: PHAs that do not administer section 8 are not required to complete sub-component 3B.

Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).

(1) Eligibility

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

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

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

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

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

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

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

Length of time on program, current landlord, previous section 8 landlords, previous landlords provided by participant.

(2) Waiting List Organization

a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (select all that apply)

- None
- Federal public housing
- Federal moderate rehabilitation
- Federal project-based certificate program
- Other federal or local program (list below)

b. Where may interested persons apply for admission to section 8 tenant-based assistance? (select all that apply)

- PHA main administrative office
- Other (list below)

(3) Search Time

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

If yes, state circumstances below:

Additional extensions of 30 days are generally limited to approved, Reasonable Accommodation requests for households with a member who is a person who is disabled and/or elderly.

(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?

Extremely low income equaled 81 % of HCV families as of 3/1/05

- b. Preferences

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

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

Former Federal preferences

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

Other preferences (select all that apply)

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

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

Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

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

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

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

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

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

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

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

(5) Special Purpose Section 8 Assistance Programs

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

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

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

- Through published notices
- Other (list below)

Announcements to community wide service agencies

4. PHA Rent Determination Policies

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

A. Public Housing

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

(1) Income Based Rent Policies

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

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

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

For the earned income of a previously unemployed household member

For increases in earned income

Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

Fixed percentage (other than general rent-setting policy)

If yes, state percentage/s and circumstances below:

For household heads

For other family members

For transportation expenses

For the non-reimbursed medical expenses of non-disabled or non-elderly families

Other (describe below)

e. Ceiling rents

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

Yes for all developments

Yes but only for some developments

No

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

For all developments

For all general occupancy developments (not elderly or disabled or elderly only)

- For specified general occupancy developments
- For certain parts of developments; e.g., the high-rise portion
- For certain size units; e.g., larger bedroom sizes
- Other (list below)

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

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

f. Rent re-determinations:

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

- Never
- At family option
- Any time the family experiences an income increase
- Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold)
- Other: ***When there is a change in family composition or increase from zero income.***

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

(2) Flat Rents

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

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

B. Section 8 Tenant-Based Assistance

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

(1) Payment Standards

Describe the voucher payment standards and policies.

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

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

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

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

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

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

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

- Annually
- Other (list below)

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

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

(2) Minimum Rent

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

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

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

If a participant family declares zero income or an income requiring more than 40% of that income for TTP at the initial intake, the participant family may apply for short term or long term hardship.

5. Capital Improvement Needs

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

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

A. Capital Fund Activities

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

(1) Capital Fund Program

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

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

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

(1) Hope VI Revitalization

- a. Yes No: Has the PHA received a HOPE VI revitalization grant? (if no, skip to next component; if yes, provide responses to questions on chart below for each grant, copying and completing as many times as necessary)
- b. Status of HOPE VI revitalization grant (complete one set of questions for each grant)
Development name:
Development (project) number:
Status of grant: (select the statement that best describes the current status)
 Revitalization Plan under development
 Revitalization Plan submitted, pending approval
 Revitalization Plan approved
 Activities pursuant to an approved Revitalization Plan underway
- c. Yes No: Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year? If yes, list development name/s below:
- d. Yes No: Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year? If yes, list developments or activities below:
- e. Yes No: Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement? If yes, list developments or activities below:

6. Demolition and Disposition

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

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

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

| Demolition/Disposition Activity Description | |
|--|--|
| 1a. Development name: <i>Mariposa Homes</i> | |
| 1b. Development (project) number: <i>03-001</i> | |
| 2. Activity type: Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/> | |
| 3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/> | |
| 4. Date application approved, submitted, or planned for submission: <i>(undetermined)</i> | |
| 5. Number of units affected: 48 | |
| 6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development | |
| 7. Timeline for activity: <i>(undetermined)</i> | |

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

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

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

(2) Program Description

a. Size of Program

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

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

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:

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

CORHA will:

- 1. Continue to build lender, realtor and builder partnerships to devise homeownership opportunities.***
- 2. Continue to develop homeownership models.***
- 3. Continue to encourage and support family self-sufficiency in asset building activities.***

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

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

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

8. Civil Rights Certifications

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

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

9. Additional Information

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

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

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

GOAL 1

To offer economically disadvantaged people housing assistance programs that provide decent, safe and healthy housing at an affordable rate.

Central Oregon Regional Housing Authority has made significant progress on ensuring a dedicated supply of affordable housing. Working relationships have been developed and continue to be maintained with area housing providers. Outreach programs are established to educate and encourage rental owner participation.

In 2000, Emma's Place (11 units), an innovative, apartment community, to serve and support adults with severe and persistent mental illness (SPMI), was developed in partnership with Deschutes County. Followed by similar developments in FY 03 through FY 05, a 15 bed Crisis Resolution Center and 14 unit Horizon House (Transitional Housing) serving adults with SPMI constructed near St. Charles Hospital in Bend. And an 8 unit apartment community to serve adults with SPMI is under construction in Prineville.

Multi-family housing developments have been built in Bend (56 units) and Sisters (33 units) both with community centers.

In FY 02 – 03, CORHA purchased and redeveloped a 10,000 sq ft office/service delivery site in downtown Redmond. The regional offices of the Central Oregon Boys and Girls Club currently lease space at the downtown site and are partnering in delivery of resident services to CORHA owned properties.

CORHA, the City of Madras and Jefferson County are partnering to redevelop a blighted neighborhood in Madras. When this redevelopment is completed it will provide farm worker housing in cooperation with CASA, multi-family housing and first time homeownership opportunities.

CORHA is also currently redeveloping a 97 unit site in Bend, adjacent to Ariel Glen (a 70 unit, LIHTC property). When reconstruction is complete in late 2005, CORHA will be able to provide extended housing and resident services to the combined properties.

Safety and Crime Prevention Policies have been developed and maintained at Public Housing sites and LIHTC owned properties. Personal safety classes and information from local police and fire departments are available at all sites. Educational forums, fire drills and Neighborhood watch programs at multi-family sites have been implemented and will continue.

GOAL 2

To operate and manage housing service programs that works in the most successful manner for participants, and complies with federal, state, and local laws.

CORHA made a significant technology investment of \$146,000.00 in FY 2003, and subsequently, continues to improve utilization and performance in maintaining accurate and timely accounting and documentation. The Section 8 Administrative Policies and Procedures continue to be updated when necessary. CORHA has implemented QHWRA regulations. CORHA has consistently earned high performance SEMAP ratings.

Public Housing has had the same benefits of the technology improvements and continues to perform at a high rating. CORHA has implemented QHWRA regulations in Public Housing.

GOAL 3

To promote incentive programs to reduce further dependency and achieve self-sufficiency.

CORHA has implemented the Section 8 Homeownership program and currently have 2 participants.

Homeownership has been achieved by 16 Family Self-Sufficiency participants with 39 releasing assistance.

CORHA continues to research of opportunities for homeownership via all available resources.

All 200 Welfare to Work Program vouchers have been fully leased.

CORHA's existing FSS program continues to grow and have had 42 graduates since July 2000.

Public Housing continues its Community Services and Self-Sufficiency Programs.

"Families Forward", a non-profit entity, has been created to capture funds to provide resident services to residents at CORHA controlled properties.

CORHA created a program called SHARE, (Self-Sufficiency, and Homeownership Activities for Resident Empowerment) designed to work on the "Family Self Sufficiency" model, to provide opportunities to residents at CORHA controlled properties.

CORHA has partnered with community agencies, (e.g. Campfire USA, Central Oregon Community College, Oregon State University, Soroptimists International of Redmond, COBRA (Central Oregon Battering & Rape Alliance), COCAAN (Central Oregon Community Action Network), and many others.) to provide children's activities, daycare, counseling, and educational programs to residents at CORHA controlled properties, and participants in the Section 8 and Public Housing programs.

GOAL 4

To network with resource agencies to assist communities in identifying and addressing housing and community development needs.

CORHA has identified community housing needs through assessment studies and continues to update and utilize data to facilitate development of community wide housing needs

CORHA partners with community, state and national resources to most effectively develop and deliver appropriate programs.

GOAL 5

To create and maintain sound real estate purchasing and maintenance practices for all programs.

CORHA continues to define and address Capital Improvements needs. Capital Fund Program Annual Statement have consistently been submitted and approved. Work on the current 5-year Capital Fund Program Plan is continually in development.

Accurate real estate appraisals and inventory of assets have been conducted and refinancing has provided leverage for increased improvement and development. CORHA continues work on the feasibility of disposition of property and acquisition. CORHA continues to maintain and track a sound Asset Management Program, while closely monitoring the performance of contracted property management company.

GOAL 6

To provide services in a cost efficient manner, while being a good steward of public funds with sound operations and management policies.

CORHA evaluates and continues to maintain Operation and Management Policies and maintains an updated Finance Policies and Procedure Manual. All CORHA accounting has been converted to GAAP.

PH reporting is in compliance with PHAS (Public Housing Assessment System) regulations.

CORHA conducts annual reviews of Insurance coverage.

CORHA's management of financial resources policies and practices, including sound reporting practices, insure separation of duties to safeguard against fraud or abuse.

Annual Audits are provided and reports are distributed in Annual Report/Calendar to community for public review.

B. Criteria for Substantial Deviations and Significant Amendments

(1) Amendment and Deviation Definitions

24 CFR Part 903.7(r)

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

Central Oregon Regional Housing Authority Five-Year and/or Annual Agency Plan Substantial Deviation/Significant Amendment Statement

It is the intent of Central Oregon Regional Housing Authority (CORHA) to adhere to the mission, goals and objectives outlined in the Five-Year strategic plan. The plan, however, will be modified and resubmitted to HUD should a substantial deviation from program goals and objectives occur. Any changes involving substantial deviation or significant amendment to either the Annual Plan and/or Five-Year Plan will require additional public review.

A. "Substantial Deviation" to the Five-Year Plan is defined as:

- Any change to the mission or any of the HUD Strategic Goal items. This does not include any change to items under "Other PHA Goals and Objectives."
- Any change in the planned or actual use of federal funds for activities that would prohibit or redirect the Housing Authority's strategic goals of increasing the availability of decent, safe and affordable housing for the citizens of Crook, Deschutes and Jefferson Counties.
- Any single or cumulative annual change in the planned or actual use of federal funds as identified in the Five-Year Plan that exceeds 20% of the Housing Authority's annual program budgets for Section 8 or public housing activities.
- A mandate from local government officials, specifically the governing board of the Housing Authority, to modify, revise, or delete the long-range goals and objectives of the program.

A substantial deviation does not include: any changes in HUD rules and regulations that require or prohibit changes to activities listed herein.

B. "Significant Amendment" to the Annual Plan is defined as:

- Changes of a significant nature to the rent or admissions policies, or the organization of the waiting list for either Public Housing or Section 8 not required by federal regulatory requirements as to effect a change in the Section 8 Administrative Plan or the Public Housing Continued Occupancy Policy (ACOP).
- Any change with regard to demolition or disposition, designation, home ownership programs or conversion activities.
- A change in the planned or use of replacement reserve funds under the Capital Fund that exceeds 20% of the Housing Authority's annual budget.

Revisions that will not be considered a "substantial deviation" or a "significant amendment" are:

- Changes to any of the items in A or B above that is being adopted to reflect changes in HUD regulatory requirements;
- Changes to any category not included in A or B above; and
- Revisions to any attachments to the Agency Plan that would not be a change to any item included in A or B above.

C. Other Information

[24 CFR Part 903.13, 903.15]

(1) Resident Advisory Board Recommendations

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

If yes, provide the comments below:

Members provided the following comments from their review of the agency plan.

- 1.) Members had differing views of opinion about the age at which a single mother with child should be allowed an extra bedroom for the child.
- 2.) Members reached agreed that the physical minimum bedroom size might be too small but were not certainty about what that size should be.
- 3.) Members expressed concern about the types of documents and information required for self-employed business.
- 4.) Members expressed concern about how we determine head of household and how we determine which family member has the right to the voucher if there is a split in the family.
- 5.) Members expressed concern about the wait list not being open until 2006. We discussed the one month wait list with the approval of the entire board. The two public housing board members were in the belief that they could transfer to section-8 at any time. We clarified that they needed to apply for the section-8 wait list
- 6.) The public housing members commented about the change in the families moving into the public housing buildings and suggested we inspect more often.
- 7.) We discussed the process of complaints and appeals to the board's satisfaction that we currently have a good system in place.

All board members agreed that these meetings were very helpful and all requested to be chosen for the board the following year.

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

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

The average age at which a single mother with a child could apply for a two bedroom (18 months) was a result of the RAB meeting.

Other: (list below)

(2) Resident Membership on PHA Governing Board

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

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

Yes No:

If yes, complete the following:

Name of Resident Member of the PHA Governing Board: **Mary Sue Grotjohn**

Method of Selection:

Appointment

The term of appointment is: 4 years (include the date term expires): 6/30/08

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

Description of Resident Election Process

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

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

Other: (describe)

Letters are sent to resident candidates offering each an opportunity to apply for the board position. Those candidates requesting consideration for the resident board position are submitted to the governing board of commissioners. The board makes the final selection.

Eligible candidates: (select one)

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

Eligible voters: (select all that apply)

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

Other (list) CORHA Board of Commissioners.

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

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

Date of next term expiration of a governing board member: 6/30/05

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

Charles M. McGraw, Chair
Occupation City Planner
County of Appointment Jefferson
Initial Term: 1991
Current Term Expiration: 2/7/06

Jan Thackery, Vice Chair
Occupation; Employment Counselor
[Retired]
County of Appointment Jefferson
Initial Term: 1996
Current Term Expiration: 6/30/08

Vesta Johnson
Occupation / Advocate
County of Appointment Jefferson
Initial Term: 2004
Current Term Expiration: 6/30/08

Michael Hinton
Occupation Mortgage Banker
County of Appointment Deschutes
Initial Term: 1998
Current Term Expiration: 6/30/08

Barbara Stone
Occupation Bank Executive [Retired]
County of Appointment Deschutes
Initial Term: 1985
Current Term Expiration: 6/30/05

Craig Unger
Occupation Police Officer
County of Appointment Deschutes
Initial Term: 1997
Current Term Expiration: 6/30/07

Laura Cooper
Occupation Attorney At Law
County of Appointment Crook
Initial Term: 2001
Current Term Expiration: 6/30/05

Barbara Young
Occupation Bank Officer
County of Appointment Crook
Initial Term: 2000
Current Term Expiration: 6/30/07

Ken Nelson
Occupation Developer
County of Appointment Crook
Initial Term: 2004
Current Term Expiration: 6/30/06

Mary Sue Grotjohn
Occupation Retired
County of Appointment NA
Initial Term: 2004
Current Term Expiration: 6/30/08

(3) PHA Statement of Consistency with the Consolidated Plan

[24 CFR Part 903.15]

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

Consolidated Plan jurisdiction: State of Oregon Consolidated Plan

a. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction:

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

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

(4) (Reserved)

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

10. Project-Based Voucher Program

- a. Yes No: Does the PHA plan to “project-base” any tenant-based Section 8 vouchers in the coming year? If yes, answer the following questions.
- b. Yes No: Are there circumstances indicating that the project basing of the units, rather than tenant-basing of the same amount of assistance is an appropriate option?

If yes, check which circumstances apply:

- Low utilization rate for vouchers due to lack of suitable rental units
- Access to neighborhoods outside of high poverty areas
- Other (describe below:)

Disabled, Homeless and Special needs individuals in need of special transitional care and housing

- c. Indicate the number of units and general location of units (e.g. eligible census tracts or smaller areas within eligible census tracts):

14 units Bend, OR, Deschutes County
8 units Prineville, OR, Crook County
8 units Redmond, OR, Deschutes County
20 units to be determined

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

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

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

| List of Supporting Documents Available for Review | | |
|--|---|---|
| Applicable & On Display | Supporting Document | Related Plan Component |
| | Consortium agreement(s). | Annual Plan: Agency Identification and Operations/ Management |
| X | Public housing grievance procedures <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy. | Annual Plan: Grievance Procedures |
| X | Section 8 informal review and hearing procedures. <input checked="" type="checkbox"/> Check here if included in Section 8 Administrative Plan. | Annual Plan: Grievance Procedures |
| X | The Capital Fund/Comprehensive Grant Program Annual Statement /Performance and Evaluation Report for any active grant year. | Annual Plan: Capital Needs |
| X | Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grants. | Annual Plan: Capital Needs |
| | Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans, or any other approved proposal for development of public housing. | Annual Plan: Capital Needs |
| | Self-evaluation, Needs Assessment and Transition Plan required by regulations implementing Section 504 of the Rehabilitation Act and the Americans with Disabilities Act. See PIH Notice 99-52 (HA). | Annual Plan: Capital Needs |
| | Approved or submitted applications for demolition and/or disposition of public housing. | Annual Plan: Demolition and Disposition |
| | Approved or submitted applications for designation of public housing (Designated Housing Plans). | Annual Plan: Designation of Public Housing |
| | Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act, Section 22 of the US Housing Act of 1937, or Section 33 of the US Housing Act of 1937. | Annual Plan: Conversion of Public Housing |
| | Documentation for required Initial Assessment and any additional information required by HUD for Voluntary Conversion. | Annual Plan: Voluntary Conversion of Public Housing |
| | Approved or submitted public housing homeownership programs/plans. | Annual Plan: Homeownership |
| X | Policies governing any Section 8 Homeownership program (Section _____ of the Section 8 Administrative Plan) | Annual Plan: Homeownership |
| X | Public Housing Community Service Policy/Programs <input checked="" type="checkbox"/> Check here if included in Public Housing A & O Policy | Annual Plan: Community Service & Self-Sufficiency |
| X | Cooperative agreement between the PHA and the TANF agency and between the PHA and local employment and training service agencies. | Annual Plan: Community Service & Self-Sufficiency |
| X | FSS Action Plan(s) for public housing and/or Section 8. | Annual Plan: Community Service & Self-Sufficiency |
| X | Section 3 documentation required by 24 CFR Part 135, Subpart E for public housing. | Annual Plan: Community Service & Self-Sufficiency |
| X | Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports for public housing. | Annual Plan: Community Service & Self-Sufficiency |
| X | Policy on Ownership of Pets in Public Housing Family Developments (as required by regulation at 24 CFR Part 960, Subpart G). <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy. | Pet Policy |
| X | The results of the most recent fiscal year audit of the PHA conducted under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings. | Annual Plan: Annual Audit |
| | Consortium agreement(s), if a consortium administers PHA programs. | Joint PHA Plan for Consortia |
| | Consortia Joint PHA Plans ONLY: Certification that consortium agreement is in compliance with 24 CFR Part 943 pursuant to an opinion of counsel on file and available for inspection | Joint PHA Plan for Consortia |
| | Other supporting documents (optional). List individually. | (Specify as needed) |

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

| Annual Statement/Performance and Evaluation Report | | | | | |
|--|---|---|------------|-------------------|--|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary | | | | | |
| PHA Name: Central Oregon Regional Housing Authority | | Grant Type and Number Capital Fund Program Grant No: OR16P034501-02 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2002 |
| <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement 3 <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 12/31/2004 <input type="checkbox"/> Final Performance and Evaluation Report | | | | | |
| Line | Summary by Development Account | Total Estimated Cost | | Total Actual Cost | |
| | | Original | Revised | Obligated | Expended |
| 1 | Total non-CFP Funds | | | | |
| 2 | 1406 Operations | 44,533.25 | 34,265.00 | 34,265.00 | 34,265.00 |
| 3 | 1408 Management Improvements | 11,000.00 | 11,000.00 | 11,000.00 | 8,980.91 |
| 4 | 1410 Administration | 12,047.00 | 12,047.00 | 12,047.00 | 12,047.00 |
| 5 | 1411 Audit | | | | |
| 6 | 1415 Liquidated Damages | | | | |
| 7 | 1430 Fees and Costs | | | | |
| 8 | 1440 Site Acquisition | | | | |
| 9 | 1450 Site Improvement | 29,615.00 | 29,615.00 | 29,615.00 | 29,615.00 |
| 10 | 1460 Dwelling Structures | 23,275.75 | 33,544.00 | 33,544.00 | 23,275.75 |
| 11 | 1465.1 Dwelling Equipment—Nonexpendable | | | | |
| 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 Costs | | | | |
| 18 | 1499 Development Activities | | | | |
| 19 | 1501 Collateralization or Debt Service | | | | |
| 20 | 1502 Contingency | | | | |
| 21 | Amount of Annual Grant: (sum of lines 2 – 20) | 120,471.00 | 120,471.00 | 120,471.00 | 108,183.56 |
| 22 | Amount of line 21 Related to LBP Activities | | | | |
| 23 | Amount of line 21 Related to Section 504 compliance | | | | |
| 24 | Amount of line 21 Related to Security – Soft Costs | | | | |
| 25 | Amount of Line 21 Related to Security – Hard Costs | | | | |
| 26 | Amount of line 21 Related to Energy Conservation Measures | | | | |

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

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages | | | | | | | | |
|--|---|---|--------------------------------|----------------------|------------|---------------------------|-------------------|--|
| PHA Name: Central Oregon Regional Housing Authority | | Grant Type and Number Capital Fund Program Grant No: OR16P034501 - 02 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2002 | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work |
| | | | | Original | Revised | Funds Obligated | Funds Expended | |
| HA - WIDE | PH OPERATIONS | 1406 | | 44,533.25 | 34,265.00 | 34,265.00 | 34,265.00 | Complete, Transfer balance to 1460 |
| HA - WIDE | Management Improvement | 1408 | 3 Trainings & 1 software | 11,000.00 | 11,000.00 | 11,000.00 | 8,980.81 | Complete |
| HA - WIDE | Administration | 1410 | | 12,047.00 | 12,047.00 | 12,047.00 | 12,047.00 | Complete |
| Dev # 03 - 001 | Replace Irrigation Systems | 1450 | 4 sites | 29,615.00 | 29,615.00 | 29,615.00 | 29,615.00 | Complete |
| Dev # 03 - 001 | Replace Roofing & Floors | 1460 | 16 units & 2 units | 23,275.75 | 33,544.00 | 33,544.00 | 23,275.75 | Transfer from 1406 to replace flooring in 2 units, project approved in 502-03 |
| TOTALS | | | | 120,471.00 | 120,471.00 | 120,471.00 | 108,183.56 | |

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

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule | | | | | | | |
|---|---|---------|---|---|------------|--------|----------------------------------|
| PHA Name: Central Oregon Regional Housing Authority | | | Grant Type and Number Capital Fund Program No: OR16P034501 - 02 Replacement Housing Factor No: | | | | Federal FY of Grant: 2002 |
| Development Number Name/HA-Wide Activities | All Fund Obligated (Quarter Ending Date) | | | All Funds Expended (Quarter Ending Date) | | | Reasons for Revised Target Dates |
| | Original | Revised | Actual | Original | Revised | Actual | |
| HA - WIDE | 06/30/2004 | | 06/30/2004 | 09/30/2005 | 06/30/2005 | | |
| DEV #034-001 | 06/30/2004 | | 06/30/2004 | 09/30/2005 | 06/30/2005 | | Completion |
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12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

| Annual Statement/Performance and Evaluation Report | | | | | |
|--|---|---|---------|-------------------|-------------------------------------|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary | | | | | |
| PHA Name: Central Oregon Regional Housing Authority | | Grant Type and Number Capital Fund Program Grant No: OR16P034501-03 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2003 |
| <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement 2 <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 12/31/2004 <input type="checkbox"/> Final Performance and Evaluation Report | | | | | |
| Line | Summary by Development Account | Total Estimated Cost | | Total Actual Cost | |
| | | Original | Revised | Obligated | Expended |
| 1 | Total non-CFP Funds | | | | |
| 2 | 1406 Operations | 35,273.00 | | 21,525.03 | 21,525.03 |
| 3 | 1408 Management Improvements | 5,000.00 | | | |
| 4 | 1410 Administration | 9,912.00 | | 9,912.00 | 9,912.00 |
| 5 | 1411 Audit | | | | |
| 6 | 1415 Liquidated Damages | | | | |
| 7 | 1430 Fees and Costs | | | | |
| 8 | 1440 Site Acquisition | | | | |
| 9 | 1450 Site Improvement | 22,990.00 | | 22,990.00 | 22,990.00 |
| 10 | 1460 Dwelling Structures | 25,937.00 | | | |
| 11 | 1465.1 Dwelling Equipment—Nonexpendable | | | | |
| 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 Costs | | | | |
| 18 | 1499 Development Activities | | | | |
| 19 | 1501 Collateralization or Debt Service | | | | |
| 20 | 1502 Contingency | | | | |
| 21 | Amount of Annual Grant: (sum of lines 2 – 20) | 99,122.00 | | 54,427.03 | 54,427.03 |
| 22 | Amount of line 21 Related to LBP Activities | | | | |
| 23 | Amount of line 21 Related to Section 504 compliance | | | | |
| 24 | Amount of line 21 Related to Security – Soft Costs | | | | |
| 25 | Amount of Line 21 Related to Security – Hard Costs | | | | |
| 26 | Amount of line 21 Related to Energy Conservation Measures | | | | |

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

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages | | | | | | | | |
|--|---|---|-------------|----------------------|---------------------------|--------------------|-------------------|---------------------------------------|
| PHA Name: Central Oregon Regional Housing Authority | | Grant Type and Number Capital Fund Program Grant No: OR16P034501 - 03 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2003 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work |
| | | | | Original | Revised | Funds Obligated | Funds Expended | |
| HA - WIDE | PH OPERATIONS | 1406 | | 35,273.00 | | 21,525.03 | 21,525.03 | Ongoing, balance from 1450 & 1460 |
| HA - WIDE | Management Improvement | 1408 | 4 trainings | 5,000.00 | | | | Training planned |
| HA - WIDE | Administration | 1410 | | 9,912.00 | | 9,912.00 | 9,912.00 | Complete |
| Dev # 03 - 001 | Replace Irrigation Systems | 1450 | 48 units | 23,000.00 | | 22,990.00 | 22,990.00 | Complete, Transfer balance to 1406 |
| Dev # 03 - 001 | Replace Roofing & Floors | 1460 | 28 units | 25,937.00 | | | | Complete |
| TOTALS | | | | 99,122.00 | | 54,427.03 | 54,427.03 | |

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

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

| PHA Name: Central Oregon Regional Housing Authority | | Grant Type and Number Capital Fund Program No: OR16P034501 - 03 Replacement Housing Factor No: | | | | | Federal FY of Grant: 2003 |
|--|---|--|--------|---|---------|--------|----------------------------------|
| Development Number Name/HA-Wide Activities | All Fund Obligated (Quarter Ending Date) | | | All Funds Expended (Quarter Ending Date) | | | Reasons for Revised Target Dates |
| | Original | Revised | Actual | Original | Revised | Actual | |
| HA - WIDE | 09/16/2005 | | | 09/30/2006 | | | |
| DEV #034-001 | 09/16/2005 | | | 09/30/2006 | | | |
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12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

| Annual Statement/Performance and Evaluation Report | | | | | |
|--|---|---|---------|-------------------|-------------------------------------|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary | | | | | |
| PHA Name: Central Oregon Regional Housing Authority | | Grant Type and Number Capital Fund Program Grant No: OR16P034502-03 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2003 |
| <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement 1 <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 12/31/2004 <input type="checkbox"/> Final Performance and Evaluation Report | | | | | |
| Line | Summary by Development Account | Total Estimated Cost | | Total Actual Cost | |
| | | Original | Revised | Obligated | Expended |
| 1 | Total non-CFP Funds | | | | |
| 2 | 1406 Operations | | | | |
| 3 | 1408 Management Improvements | | | | |
| 4 | 1410 Administration | 1,975.00 | | 1,975.00 | 1,975.00 |
| 5 | 1411 Audit | | | | |
| 6 | 1415 Liquidated Damages | | | | |
| 7 | 1430 Fees and Costs | | | | |
| 8 | 1440 Site Acquisition | | | | |
| 9 | 1450 Site Improvement | | | | |
| 10 | 1460 Dwelling Structures | 17,780.00 | | | |
| 11 | 1465.1 Dwelling Equipment—Nonexpendable | | | | |
| 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 Costs | | | | |
| 18 | 1499 Development Activities | | | | |
| 19 | 1501 Collateralization or Debt Service | | | | |
| 20 | 1502 Contingency | | | | |
| 21 | Amount of Annual Grant: (sum of lines 2 – 20) | 19,755.00 | | 1,975.00 | 1,975.00 |
| 22 | Amount of line 21 Related to LBP Activities | | | | |
| 23 | Amount of line 21 Related to Section 504 compliance | | | | |
| 24 | Amount of line 21 Related to Security – Soft Costs | | | | |
| 25 | Amount of Line 21 Related to Security – Hard Costs | | | | |
| 26 | Amount of line 21 Related to Energy Conservation Measures | | | | |

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

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages | | | | | | | | |
|--|---|---|----------|----------------------|---------|---------------------------|-------------------|----------------|
| PHA Name: Central Oregon Regional Housing Authority | | Grant Type and Number Capital Fund Program Grant No: OR16P034502 - 03 Replacement Housing Factor Grant No: | | | | Federal FY of Grant: 2003 | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work |
| | | | | Original | Revised | Funds Obligated | Funds Expended | |
| HA-WIDE | Administration | 1410 | | 1,975.00 | | 1,975.00 | 1,975.00 | Complete |
| Dev # 03 - 001 | Floors | 1460 | 6 units | 17,780.00 | | | | Contracted |
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12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

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|--|---|--|--|---|--|---------------------------|----------------------------------|
| PHA Name: Central Oregon Regional Housing Authority | | Grant Type and Number Capital Fund Program No: OR16P034502 - 03 Replacement Housing Factor No: | | | | Federal FY of Grant: 2003 | |
| Development Number Name/HA-Wide Activities | All Fund Obligated (Quarter Ending Date) | | | All Funds Expended (Quarter Ending Date) | | | Reasons for Revised Target Dates |
| | | | | | | | |
| DEV #034-001 | 3/31/2005 | | | 9/30/2006 | | | |
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12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary | | | | | |
|--|---|--|---------|-------------------|------------------------------------|
| PHA Name: Central Oregon Regional Housing Authority | | Grant Type and Number Capital Fund Program Grant No: OR16P034501-04 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2004 |
| <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement 1 <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 12/31/2004 <input type="checkbox"/> Final Performance and Evaluation Report | | | | | |
| Line | Summary by Development Account | Total Estimated Cost | | Total Actual Cost | |
| | | Original | Revised | Obligated | Expended |
| 1 | Total non-CFP Funds | | | | |
| 2 | 1406 Operations | 30,000.00 | | | |
| 3 | 1408 Management Improvements | | | | |
| 4 | 1410 Administration | 11,479.00 | | | |
| 5 | 1411 Audit | | | | |
| 6 | 1415 Liquidated Damages | | | | |
| 7 | 1430 Fees and Costs | | | | |
| 8 | 1440 Site Acquisition | | | | |
| 9 | 1450 Site Improvement | 43,314.00 | | | |
| 10 | 1460 Dwelling Structures | 30,000.00 | | | |
| 11 | 1465.1 Dwelling Equipment—Nonexpendable | | | | |
| 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 Costs | | | | |
| 18 | 1499 Development Activities | | | | |
| 19 | 1501 Collateralization or Debt Service | | | | |
| 20 | 1502 Contingency | | | | |
| 21 | Amount of Annual Grant: (sum of lines 2 – 20) | 114,793.00 | | | |
| 22 | Amount of line 21 Related to LBP Activities | | | | |
| 23 | Amount of line 21 Related to Section 504 compliance | | | | |
| 24 | Amount of line 21 Related to Security – Soft Costs | | | | |
| 25 | Amount of Line 21 Related to Security – Hard Costs | | | | |
| 26 | Amount of line 21 Related to Energy Conservation Measures | | | | |

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

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages | | | | | | | | |
|--|---|---------------------|---|----------------------|------------|---------------------------|-------------------|----------------|
| PHA Name: Central Oregon Regional Housing Authority | | | Grant Type and Number Capital Fund Program Grant No: OR16P034501 - 04 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2004 | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work |
| | | | | Original | Revised | Funds Obligated | Funds Expended | |
| HA - WIDE | PH OPERATIONS | 1406 | | 30,000.00 | | | | |
| HA - WIDE | Administration | 1410 | | 11,479.00 | | | | |
| Dev # 03 - 001 | Sidewalks & Driveways | 1450 | 2/2 | 43,314.00 | | | | |
| Dev # 03 - 001 | Floor Replacement | 1460 | 12 units | 30,000.00 | | | | |
| TOTAL | | | | | 114,793.00 | | | |

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

| PHA Name: Central Oregon Regional Housing Authority | | Grant Type and Number Capital Fund Program No: OR16P034501 - 04 Replacement Housing Factor No: | | | | | Federal FY of Grant: 2004 |
|--|---|--|--------|---|---------|--------|----------------------------------|
| Development Number Name/HA-Wide Activities | All Fund Obligated (Quarter Ending Date) | | | All Funds Expended (Quarter Ending Date) | | | Reasons for Revised Target Dates |
| | Original | Revised | Actual | Original | Revised | Actual | |
| HA - WIDE | 09/13/2006 | | | 09/13/2008 | | | |
| DEV #034-001 | 09/13/2006 | | | 09/13/2008 | | | |
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12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

| Annual Statement/Performance and Evaluation Report | | | | | |
|--|---|---|---------|-------------------|--|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary | | | | | |
| PHA Name: Central Oregon Regional Housing Authority | | Grant Type and Number Capital Fund Program Grant No: OR16P034501-05 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2005 |
| <input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement <input type="checkbox"/> Performance and Evaluation Report for Period Ending: 12/31/2005 <input type="checkbox"/> Final Performance and Evaluation Report | | | | | |
| Line | Summary by Development Account | Total Estimated Cost | | Total Actual Cost | |
| | | Original | Revised | Obligated | Expended |
| 1 | Total non-CFP Funds | | | | |
| 2 | 1406 Operations | 30,000.00 | | | |
| 3 | 1408 Management Improvements | | | | |
| 4 | 1410 Administration | 11,479.00 | | | |
| 5 | 1411 Audit | | | | |
| 6 | 1415 Liquidated Damages | | | | |
| 7 | 1430 Fees and Costs | | | | |
| 8 | 1440 Site Acquisition | | | | |
| 9 | 1450 Site Improvement | | | | |
| 10 | 1460 Dwelling Structures | 73,314.00 | | | |
| 11 | 1465.1 Dwelling Equipment—Nonexpendable | | | | |
| 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 Costs | | | | |
| 18 | 1499 Development Activities | | | | |
| 19 | 1501 Collateralization or Debt Service | | | | |
| 20 | 1502 Contingency | | | | |
| 21 | Amount of Annual Grant: (sum of lines 2 – 20) | 114,793.00 | | | |
| 22 | Amount of line 21 Related to LBP Activities | | | | |
| 23 | Amount of line 21 Related to Section 504 compliance | | | | |
| 24 | Amount of line 21 Related to Security – Soft Costs | | | | |
| 25 | Amount of Line 21 Related to Security – Hard Costs | | | | |
| 26 | Amount of line 21 Related to Energy Conservation Measures | | | | |

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

| Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages | | | | | | | | |
|--|---|---|----------|----------------------|---------------------------|--------------------|-------------------|----------------|
| PHA Name: Central Oregon Regional Housing Authority | | Grant Type and Number Capital Fund Program Grant No: OR16P034501 - 05 Replacement Housing Factor Grant No: | | | Federal FY of Grant: 2005 | | | |
| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Dev. Acct No. | Quantity | Total Estimated Cost | | Total Actual Cost | | Status of Work |
| | | | | Original | Revised | Funds Obligated | Funds Expended | |
| HA - WIDE | PH OPERATIONS | 1406 | | 30,000.00 | | | | |
| HA - WIDE | Administration | 1410 | | 11,479.00 | | | | |
| Dev # 03 - 001 | Floor Replacement | 1460 | 15 units | 33,314.00 | | | | |
| Dev # 03 - 001 | Heating Systems | 1460 | 8 | 20,000.00 | | | | |
| Dev # 03 - 001 | Cupboard/Countertop Replacement | 1460 | 10 | 20,000.00 | | | | |
| | | | | | | | | |
| | TOTAL | | | 114,793.00 | | | | |

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

| | | | | | | | | |
|--|---|--|--------|---|---------|--------|----------------------------------|--|
| PHA Name: Central Oregon Regional Housing Authority | | Grant Type and Number Capital Fund Program No: OR16P034501 - 05 Replacement Housing Factor No: | | | | | Federal FY of Grant: 2005 | |
| Development Number Name/HA-Wide Activities | All Fund Obligated (Quarter Ending Date) | | | All Funds Expended (Quarter Ending Date) | | | Reasons for Revised Target Dates | |
| | Original | Revised | Actual | Original | Revised | Actual | | |
| HA - WIDE | 07/31/2007 | | | 07/31/2009 | | | | |
| DEV #034-001 | 07/31/2007 | | | 07/31/2009 | | | | |
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Capital Fund-Five Year Plan

| Capital Fund Program Five-Year Action Plan | | | | | |
|---|-----------------------|--|--|---|--|
| Part I: Summary | | | | | |
| PHA Name Central Oregon Regional Housing Authority | | | | <input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No: | |
| Development Number/Name/HA-Wide | Year 1 2005 | Work Statement for Year 2 FFY Grant: PHA FY: 2006 | Work Statement for Year 3 FFY Grant: PHA FY: 2007 | Work Statement for Year 4 FFY Grant: PHA FY: 2008 | Work Statement for Year 5 FFY Grant: PHA FY: 2009 |
| | Annual Statement | | | | |
| Development # 034-001 | | 60,000.00 | 60,000.00 | 60,000.00 | 60,000.00 |
| Operations | | 43,500.00 | 43,500.00 | 43,500.00 | 43,500.00 |
| Administration | | 11,500.00 | 11,500.00 | 11,500.00 | 11,500.00 |
| | | | | | |
| | | | | | |
| | | | | | |
| CFP Funds Listed for 5-year planning | | 115,000.00 | 115,000.00 | 115,000.00 | 115,000.00 |
| Replacement Housing Factor Funds | | | | | |

