

PHA Plans

Streamlined 5-Year/Annual Version

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

OMB No. 2577-0226
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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

Beaufort Housing Authority
PO Box 1104
Beaufort, S.C. 29901

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: Beaufort Housing Authority

PHA Number: SC026

PHA Fiscal Year Beginning: 10/2005

PHA Programs Administered:

- Public Housing and Section 8**
 Section 8 Only
 Public Housing Only
 Number of public housing units:295
 Number of S8 units:
 Number of public housing units:
 Number of S8 units:
 554

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

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

Public Access to Information

Information regarding any activities outlined in this plan can be obtained by contacting:

(select all that apply)

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

Display Locations For PHA Plans and Supporting Documents

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

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

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

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

Streamlined Five-Year PHA Plan

PHA FISCAL YEARS 2005 - 2009

[24 CFR Part 903.12]

A. Mission

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

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- The PHA's mission is: The mission of the Beaufort Housing Authority is to provide affordable housing in a safe community environment and to assist those we serve as they strive to achieve self-sufficiency.

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: When Available
 - Reduce public housing vacancies:
 - Leverage private or other public funds to create additional housing opportunities: possibly a tax credit development .
 - Acquire or build units or developments
 - Other (list below)
Work with a for profit developer to place 7 or 8 affordable units in a new subdivision.

- X PHA Goal: Improve the quality of assisted housing
Objectives:
 - Improve public housing management: (PHAS score)Maintain High Performer Designation.(Score 90 or above)

- Improve voucher management: (SEMAP score) Maintain High Performer Designation. (Score 90 or above)
 - 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: Continue using CFP Program
 - 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
 - Continue voucher homeownership program:
 - Implement public housing or other homeownership programs:
 - Implement public housing site-based waiting lists:
 - Convert public housing to vouchers:
 - Other: Achieve a minimum of 5 closings in the Section 8 Homeownership Program/

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: Maintain decent, safe, affordable housing making residents proud of their homes.

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: Maintain effective resident organizations in each community.

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

- PHA Goal: Ensure equal opportunity and affirmatively further fair housing
Objectives:
 - Maintain 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)

1. Renovate administrative & maintenance facilities to improve staff efficiency & services to our customers.
2. Apply for grants from the State Housing Authority & other sources to increase the inventory of affordable housing .
3. Foster public/ private partnerships for to provide affordable housing and/or services.
4. Work with the Beaufort County Affordable Housing Consortium to seek solutions to the shortage of affordable housing in our community.

Streamlined Annual PHA Plan PHA Fiscal Year 2005 [24 CFR Part 903.12(b)]

Table of Contents

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

A. ANNUAL STREAMLINED PHA PLAN COMPONENTS

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	C. Leveraging of Capital Funds (sc026c01)	
	D. FY 2005 Capital Fund Program (sc026d01)	
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	H. Performance & Evaluation SC26-501-04 (sc026h01)	
	I. Progress Regarding 5 Year Goals (sc026i01)	
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	K. Pet Ownership (sc026k01)	
	L. Deconcentration Plan (sc026l01)	

M. Homeownership Capacity Statement (sc026m01)

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.

The Beaufort Housing Authority has prepared this plan in compliance with Section 511 of the Quality Housing and Work Responsibility Act of 1998 and the ensuing HUD requirements.

Our Annual Plan is based on the premise that if we accomplish our goals and objectives as shown in our Five Year Plan we will be working towards the achievement of our mission.

The plans, statements, budget summary and policies set forth herein will lead toward the accomplishment of our mission. Taken as a whole, they outline a comprehensive approach and are consistent with the Consolidated Plan for our area. Here are just a few highlights of our Annual Plan:

- We will retain the calculation of rent payments at the greater of 30% of adjusted monthly income, 10% of monthly income or shelter rent.
- We will utilize Voucher Payment Standards below the 90% HUD threshold in concert with reduced program funding. This action is not expected to have a significant impact on unit choice but will help us to achieve 98% to 99% occupancy.
- We have retained our local preference for working families and those who are pursuing or have recently graduated from an educational program.
- We have implemented a homeownership program, for Section 8 FSS participants using HOME funds.
- We will administer a Tenant Based Rental Assistance (TBRA) Program using HOME funds.
- We will provide down payment and closing cost assistance using HOME funds.
- We plan to re-open the Housing Voucher waiting list for disabled families only.
- We will complete the disposition plan for SC026-01 by selling two vacant lots to the City of Beaufort. We will give a 50' x 50' parcel located at Oak Hill Terrace to the Beaufort Jasper Water and Sewer Authority for a lift station.
- We will pledge a portion of future year capital funds as security for private borrowing to provide an improved administrative and maintenance facility.

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

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

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

Housing Needs of Families on the PHA's Waiting Lists			
Waiting list type: (select one)			
<input 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	132		90
Extremely low income <=30% AMI	98	74%	
Very low income (>30% but <=50% AMI)	33	25%	
Low income (>50% but <80% AMI)	1	1%	
Families with children	66	50%	
Elderly families	5	4%	
Families with Disabilities	19	14%	
Race/ethnicity White	19	14%	
Race/ethnicity Black	113	85%	
Race/ethnicity Hispanic	3	1%	
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	62	47%	
2 BR	51	39%	
3 BR	18	13%	
4 BR	1	1%	
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?			
<input type="checkbox"/> No <input type="checkbox"/> Yes			
Housing Needs of Families on the PHA's Waiting Lists			

Housing Needs of Families on the PHA's Waiting Lists			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	320		150
Extremely low income <=30% AMI	260	81%	
Very low income (>30% but <=50% AMI)	58	18%	
Low income (>50% but <80% AMI)	2	1%	
Families with children	257	80%	
Elderly families	6	2%	
Families with Disabilities	16	5%	
Race/ethnicity White	43	13%	
Race/ethnicity Black	277	86%	
Race/ethnicity Hispanic	3	1%	
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)? 8 months			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes Disabled Only			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?			
<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes Will open to disabled families only this year.			

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.

The Workforce Housing Needs Assessment prepared for Beaufort County in March 2004 (for the period 2004/2009) reported a much greater demand for affordable rental units over homeownership units. The Beaufort Housing Authority has traditionally provided rental units and this will continue to be our main focus. We currently provide rental units or assistance to 867 families. We will continue homeownership activities to a lesser degree primarily through the Section 8 Homeownership program.

We have historically maintained a 98% lease rate in public housing with the down time attributed to turnover and renovation for the next tenant. There is no special strategy planned other than those items

checked below to reduce the “make ready” time. Good planning and optimal allocation of staff and resources will help accomplish this.

Funding for the Section 8 Program has been significantly reduced and presents a special challenge to increase the lease rate. Policy changes were implemented last year regarding minimum rents and lowering payment standards in an effort to reduce the per unit cost (PUC). The PUC is coming down but remains above the funding rate. As the PUC continues to drop, we will make a concerted effort to achieve and maintain a 98% to 99% lease rate. The current rate is 93% and is consuming all funding at this time. We have been successful in applying for Tenant Based Rental Assistance Vouchers through the HOME program and will continue to apply when available. These vouchers are above and beyond regular HUD allocations and help meet the increasing demand. The Section 8 waiting list has been closed for 8 months, and there are currently 320 families on the list representing a wait time in excess of 2 years. There is a relatively small number of disabled families on the list (16), and we have 22 vouchers allocated for this group. Our plan is to reopen the list for the disabled only during this plan year.

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

Select all that apply

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

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

Select all that apply

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

- assistance.
- Other: (list below)
Apply for SC Housing Trust Funds &/ or HOME funds to increase affordable housing units.

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

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

Select all that apply

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

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

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

Select all that apply

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

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

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

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

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

- Affirmatively market to local non-profit agencies that assist families with disabilities
- Other: (list below)
Work with local advocacy groups to determine additional housing needs for persons with disabilities. Continue relationship with landlord who has a significant number of handicapped units.

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

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

Select if applicable

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

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

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

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

(2) Reasons for Selecting Strategies

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

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

2. Statement of Financial Resources

[24 CFR Part 903.12 (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	59,281	
b) Public Housing Capital Fund	403,324	
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	2,717,527	
f) Resident Opportunity and Self-Sufficiency Grants		
g) Community Development Block Grant		
h) HOME		
Other Federal Grants (list below)		
2. Prior Year Federal Grants (unobligated funds only) (list below)		
HOME	74,059	Ten.Bases Rental Vouchers
P.H.Capital Fund	225,089	
3. Public Housing Dwelling Rental Income	800,000	
4. Other income (list below)		
Investments	4,800	Public Housing
Late Fees	15,000.	Public Housing
4. Non-federal sources (list below)		
SC Housing Trust Fund or HOME	500,000	Construct Rental Units
Total resources	4,799,080	

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: (state time)
- Other: (describe) Within 45 days of receiving the application.

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

- Criminal or Drug-related activity
- Rental history
- Housekeeping
- Other (describe) Credit history
Sex Offenders Registry

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)

When the applicant is out of state a National records check is performed through our computer software vendor.

(2)Waiting List Organization

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

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

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

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

c. Site-Based Waiting Lists-Previous Year

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

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

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

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

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

d. Site-Based Waiting Lists – Coming Year

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

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

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

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

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

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

(3) Assignment

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

- One
- Two
- Three or More

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

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

(4) Admissions Preferences

a. Income targeting:

- Yes No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income? **Due to the median income levels in our jurisdiction, we traditionally exceed the 30% income level for over 40% of new admissions. We do not specifically target these families however.**

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)
Single applicants that are elderly, disabled, or displaced over other single applicants

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

1 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

- 2 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
- 2 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)
- 2 Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes

3 Other preference(s) (list below)
 Single applicants that are not elderly, disabled, or displaced

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)]
Scattered S.F. Homes	30	Size & configuration promote deconcentration	
Single Duplex	2	Size & configuration promote deconcentration	

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)

Past history if previous Section 8 participant

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)

When the applicant is from out of state a National records check is performed through our computer software vendor.

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

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

Sex Offenders Registry

Rental history if known and requested

(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)
Section 8 Office

The list is currently closed however it will open this plan year for disabled/handicapped only.

(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:

Extenuating circumstances such as illness or hospitalization
Extremely large families
Persons seeking handicapped accessible units

(4) Admissions Preferences

- a. Income targeting

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

- b. Preferences

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

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

Former Federal preferences

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in your jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs

- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)

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

1 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

- 2 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
- 2 Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- 2 Households that contribute to meeting income requirements (targeting)
- 2 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 as necessary
 Other (list below)
Contact human service providers

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 to employ (select all that apply)

For the earned income of a previously unemployed household member

For increases in earned income

Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

Fixed percentage (other than general rent-setting policy)

If yes, state percentage/s and circumstances below:

For household heads

For other family members

For transportation expenses

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

Other (describe below)

e. Ceiling rents

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

Yes for all developments

Yes but only for some developments

No

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

For all developments

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

For specified general occupancy developments

For certain parts of developments; e.g., the high-rise portion

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

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

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

f. Rent re-determinations:

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

- Never
- At family option
- Any time the family experiences an income increase (except regular increases in wages at the same job or periodic increases in government benefits) The threshold for upward adjustment \$1200 annually or \$30 in total tenant payment.
- Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold)_____
- Other (list below)

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

(2) Flat Rents

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

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

B. Section 8 Tenant-Based Assistance

Exemptions: PHAs that do not administer Section 8 tenant-based assistance are not required to complete sub-

component 4B. **Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

(1) Payment Standards

Describe the voucher payment standards and policies.

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

- At or below **90%** and 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)

HUD approved payment standards below the basic range of 90%-110% of the Fair Market Rents (FMRs) .The standards are based on BHA survey data analyzed by HUD in accordance with 24 CFR 982.503(b)(2) and 982.503(d).

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)
Available funding

(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)

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: Scattered Units 1b. Development (project) number: SC026001
2. Activity type: Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one) Approved <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: <u>06/15/2005</u>
5. Number of units affected: (0)
6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development—(2) vacant lots SC026001—No dwelling units involved <input type="checkbox"/> Total development

7. Timeline for activity: a. Actual or projected start date of activity: October 2004 b. Projected end date of activity: September 2005

Demolition/Disposition Activity Description
1a. Development name: Oak Hill Terrace 1b. Development (project) number: SC026002
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: (07/15/2005)
5. Number of units affected: (0)
6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development 50 ft. X 50 ft. section for sewage lift station <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: July 2005 b. Projected end date of activity: December 2005

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? 16

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:

Family or individual must have been assisted by Section 8 or lived in public housing for the previous nine (9) months. During this assistance period, all program requirements must have been complied with.

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

1. Applied for and received funding for a Home Ownership Coordinator
The position has been fill and the employee has received training in the Housing Choice Voucher Home Ownership Program provided by HUD.
2. Use the Family Self Sufficiency Program (FSS) to identify prospective participants for home ownership.
3. Investigate mortgage funds provided by the State Housing Authority programs as a source of financing.
4. Utilize program income earned through the HOME program as a source of gap funding.
5. Continue our Budget & Credit Repair Program. Utilize the Home Ownership Counseling Program administered by the Lowcountry Community Development Corporation.

(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.)

See Attachment I

B. Criteria for Substantial Deviations and Significant Amendments

(1) Amendment and Deviation Definitions

24 CFR Part 903.7(r)

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

a. Substantial Deviation from the 5-Year Plan

Substantial deviation is defined as significant changes to the stated goals that fundamentally change the mission, objectives, or plans of the agency and require formal approval of the Board of Commissioners.

a. Significant Amendment or Modification to the Annual Plan

Substantial deviations or significant amendments or modifications are defined as discretionary changes in the plans or policies of the agency that fundamentally change the mission, goals, objectives, or plans and require formal approval of the Board of Commissioners.

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:

- * The Board expressed concern regarding the future of Marsh Pointe apartments as a result of a recent newspaper article stating the property may be sold. It was a consensus of the Board that the apartments remain where they are and part of the housing authority inventory.
- * The Board is in agreement with the "working preference" but feels the preference for attending school or participating in a job training program should state that the individual applying must be attending full time. The concern is that a person taking one class and not working could be given a preference.
- * The Board discussed the reopening of the Section 8 waiting list for handicapped / disabled only. They feel if a child is disabled then the mother, guardian or head of household should be able to apply under this opening.

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:
- Other: **A Public Hearing was held June 15, 2005. There was no one in attendance.**

(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:

Dorothyann V. Mullen

Method of Selection:

- Appointment
The term of appointment is (include the date term expires):
- 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) Resident Advisory Board consists of Presidents of Resident Councils elected by residents. Resident Advisory Board elects Resident Commissioner.

Eligible candidates: (select one)

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

Eligible voters: (select all that apply)

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

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

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

Date of next term expiration of a governing board member: February 2007

Name and title of appointing official(s) for governing board (indicate appointing official for the next available position): Bill Rauch – Mayor-City of Beaufort

(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 South Carolina

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

- 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)

1. Provide affordable homeownership opportunities
2. Increase low income rental units
3. Seek additional Section 8 funding when available (HOME Program)
4. Provide economic development opportunities by administering a Family Self Sufficiency Program.
5. Utilize ceiling rents as an incentive for family economic improvement

Other: (list below)

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

The State Housing Authority administers programs which provide funding for housing programs utilized by the Beaufort Housing Authority.

(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:)

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

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

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
X	<i>PHA Certifications of Compliance with the PHA Plans and Related Regulations and Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans.</i>	Standard 5 Year and Annual Plans; streamlined 5 Year Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan.	5 Year Plans
X	Fair Housing Documentation Supporting Fair Housing Certifications: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans
X	Housing Needs Statement of the Consolidated Plan for the jurisdiction(s) in which the PHA is located and any additional backup data to support statement of housing needs for families on the PHA’s public housing and Section 8 tenant-based waiting lists.	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O/ACOP), which includes the Tenant Selection and Assignment Plan [TSAP] and the Site-Based Waiting List Procedure.	Annual Plan: Eligibility, Selection, and Admissions Policies
NA	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
X	Schedule of flat rents offered at each public housing development. <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies (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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
X	Results of latest Public Housing Assessment System (PHAS) Assessment (or other applicable assessment).	Annual Plan: Management and Operations
NA	Follow-up Plan to Results of the PHAS Resident Satisfaction Survey (if necessary)	Annual Plan: Operations and Maintenance and Community Service & Self-Sufficiency
X	Results of latest Section 8 Management Assessment System (SEMAP)	Annual Plan: Management and Operations
NA	Any policies governing any Section 8 special housing types <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Operations and Maintenance
NA	Consortium agreement(s).	Annual Plan: Agency Identification and Operations/ Management
X	Public housing grievance procedures <input 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
NA	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grants.	Annual Plan: Capital Needs
NA	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans, or any other approved proposal for development of public housing.	Annual Plan: Capital Needs
X	Self-evaluation, Needs Assessment and Transition Plan required by regulations implementing Section 504 of the Rehabilitation Act and the Americans with Disabilities Act. See PIH Notice 99-52 (HA).	Annual Plan: Capital Needs
X	Approved or submitted applications for demolition and/or disposition of public housing.	Annual Plan: Demolition and Disposition
NA	Approved or submitted applications for designation of public housing (Designated Housing Plans).	Annual Plan: Designation of Public Housing
NA	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
NA	Documentation for required Initial Assessment and any additional information required by HUD for Voluntary Conversion.	Annual Plan: Voluntary Conversion of Public Housing
X	Approved or submitted public housing homeownership programs/plans.	Annual Plan: Homeownership
X	Policies governing any Section 8 Homeownership program (Section 23 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
NA	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports for public housing.	Annual Plan: Community Service & Self-Sufficiency
X	Policy on Ownership of Pets in Public Housing Family Developments (as required by regulation at 24 CFR Part 960, Subpart G). <input type="checkbox"/> Check here if included in the public housing A & O Policy.	Pet Policy

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
X	The results of the most recent fiscal year audit of the PHA conducted under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings.	Annual Plan: Annual Audit
NA	Consortium agreement(s), if a consortium administers PHA programs.	Joint PHA Plan for Consortia
NA	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)

Attachments:

- A. sc026a01 FY 2004 Capital Fund Loan Program
- B. sc026b01 Justification for Admin./Maint.Facility
- C. sc026c01 Leveraging of Capital Funds
- D. sc026d01 FY 2005 Capital Funf Program SC26-501-05
- E. sc026e01 FY2005 Capital Fund 5 Year Plan
- F. sc026f01 Performance & Evaluation SC26-501-03
- G. sc026g01 Performance & Evaluation SC26-502-03
- H. sc026h01 Performance & Evaluation SC26-501-04
- I. sc026i01 Progress 5 Year Goals
- J. sc026j01 Membership Resident Advisory Board
- K. sc026k01 Pet Ownership
- L. sc026l01 Deconcentration Plan
- M. sc026m01 Homeownership Capacity Statement

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: Beaufort Housing Authority		Grant Type and Number Capital Fund SC26-501-05			Federal FY of Grant:
		Capital Fund Program Grant No: Replacement Housing Factor Grant No:			
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures				
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)				
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				

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan					
Part I: Summary					
PHA Name				<input type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:	
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: PHA FY:	Work Statement for Year 3 FFY Grant: PHA FY:	Work Statement for Year 4 FFY Grant: PHA FY:	Work Statement for Year 5 FFY Grant: PHA FY:
	Annual Statement				
CFP Funds Listed for 5-year planning					
Replacement Housing Factor Funds					

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan						
Part II: Supporting Pages—Work Activities						
Activities for Year 1	Activities for Year : ____ FFY Grant: PHA FY:			Activities for Year: ____ FFY Grant: PHA FY:		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See						
Annual						
Statement						
Total CFP Estimated Cost			\$			\$

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

PHA Name: Beaufort Housing Authority	Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No:	Bond Funds Attachment A	Federal FY of Grant: 2004
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Original Annual Statement
 Reserve for Disasters/Emergencies
 Revised Annual Statement (revision no.)
 Performance and Evaluation Report for Program Year Ending -
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	-	-	-	-
3	1408 Management Improvements	-	-	-	-
4	1410 Administration	1,000.00	-	-	-
	1411 Debt Service Bonds				
5	1415 Liquidated Damages	-	-	-	-
6	1420 Debt Service Bonds	-	-	-	-
7	1430 Fees and Costs	108,874.00	-	-	-
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	-	-	-	-
10	1460 Dwelling Structures	-	-	-	-
11	1465.1 Dwelling Equipment - Nonexpendable	-	-	-	-
12	1470 Nondwelling Structures	475,355.00	-	-	-
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)	\$ 585,229.00	\$ -	\$ -	\$ -
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 Conversation Measures	-	-	-	-

Attachment B

Justification for new Administrative / Maintenance Facility

The current building began as a single project facility consisting of two offices, a community room and a maintenance shop. There have been three renovations since 1982, and there are now five offices, a small meeting area and a larger shop area. The community room has been absorbed except for the meeting area, which also contains a computer work station and work areas for two employees. The Section 8 office is in a converted two-bedroom unit. The building has three offices and a small bathroom which is used by the staff and general public. The waiting area is a hallway with two chairs. The current Administrative/Maintenance facility will be converted to all administrative bringing the entire staff to one location. This will improve management capabilities and will provide better services to our clients. The facility will have the following major features.

- Reception area
- Office space for eleven employees
- Staff training room
- Board room

For maintenance, we propose to construct a facility of approximately 4000 square feet on land leased from the City of Beaufort (long term for \$1.00 per year). This facility will be approximately 2 miles away and will not pose any problems we cannot overcome.

Attachment C

Leveraging of Capital Funds

The Beaufort Housing Authority is in need of additional office space, and the City of Beaufort would like for us to remain within their boundaries. To accomplish this, the existing building will be renovated to house all administrative staff (other than Sandalwood Terrace staff). A maintenance facility will be constructed at the City public works site on property leased long term for \$1.00 per year. To fund the new facility, the Authority has elected to join a pool of other South Carolina housing authorities to enter into a loan agreement with Fannie Mae. Subject to HUD approval, the loan will be secured and paid from future funds received by the Authority under HUD's Capital Fund Program. Approximately 12% of the annual funds will be pledged leaving 88% for other capital and management improvements. The estimated amount of the annual interest and principal payment over the next 20 years is expected to be approximately \$45,000.

The amount of funds expected to be received and the costs of financing are as follows:

SOURCE OF FUNDS:

Gross Borrowing	\$585,229
-----------------	-----------

USE OF FUNDS

New Admin. / Maint. Build	\$509,355
---------------------------	-----------

Cost of Financing	\$24,071
Debt Service Reserve Req.	45,000
Capitalized Interest	<u>6,803</u>

Total	\$585,229
-------	-----------

Construction of the facility is expected to be completed within 2 years after receiving the funds.

Budget line item 1501 will show the budgeted use of capital funds for the payment of debt service.

As stated above, we propose to utilize 12% our annual capital funds for this endeavor. We have already installed heating and air conditioning in our units, and there are currently no problems which cannot be addressed with the remaining capital fund appropriations of about \$314,000 annually. Refer to the five year plan.

We included work items in this plan exceeding \$314,000 to have the opportunity to utilize fungibility.

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

PHA Name: Beaufort Housing Authority	Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No:	CFP 501-05 Attachment D	Federal FY of Grant: 2005
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Original Annual Statement
 Reserve for Disasters/Emergencies
 Revised Annual Statement (revision no.)
 Performance and Evaluation Report for Program Year Ending -
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	3,000.00	-	-	-
3	1408 Management Improvements	-	-	-	-
4	1410 Administration	16,500.00	-	-	-
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	13,000.00	-	-	-
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	82,824.00	-	-	-
10	1460 Dwelling Structures	239,900.00	-	-	-
11	1465.1 Dwelling Equipment - Nonexpendable	-	-	-	-
12	1470 Nondwelling Structures	-	-	-	-
13	1475 Nondwelling Equipment	3,100.00	-	-	-
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	45,000.00	-	-	-
20	1502 Contingency	-	-	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	\$ 403,324.00	\$ -	\$ -	\$ -
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 Conversation Measures	-	-	-	-

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

PHA Name:		Grant Type and Number			Federal FY of Grant:			
Beaufort Housing Authority		Capital Fund Program Grant No: CFP 501-05 Replacement Housing Factor Grant Attachment D			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	Administration	1410.00		6,000.00				
	Revise Employee Handbook	1410.00		4,000.00				
	Salary Comparability Study	1410.00		4,000.00				
	Receipt System	1410.00		2,500.00				
	A/E Fees	1430.00		13,000.00				
	Chainsaw	1475.00		400.00				
	Sewer Machine	1475.00		1,700.00				
	Mulching Machine	1475.00		1,000.00				
	Prune Trees	1450.00		12,824.00				
	Battery Operated Smoke Alarms	1460.00	200 Units	3,000.00				
	Cycle Paint	1460.00	49 units	22,400.00				
	Transfer to Operating	1406.00		3,000.00				
SC26-2								
Oakhill Terr.	Weatherstrip Doors	1460.00	38 units	10,000.00				
SC26-6	Replace Storage Doors	1460.00	50 units	20,000.00				
Yemassee H	Replace Ceiling Texture	1460.00	50 units	63,000.00				
	Replace Kitchen Light	1460.00	50 units	9,000.00				
	Resurface Parking Lot	1450.00	50 units	62,000.00				
SC26-7								
Marsh Pointe	Replace Roof	1460.00	30 units	67,000.00				
SC26-8	Replace Drain Field	1450.00	4 units	8,000.00				
SF Homes	Replace Windows	1460.00	6 units	12,000.00				
	Replace Roofs	1460.00	7 units	31,500.00				
SC26-9								
Duplex	Paint Exterior	1460.00	2 units	2,000.00				
HA Wide	Debt Servise	1501.00		45,000.00				
	Total			403,324.00				

Capital Fund Program Five-Year Action Plan
Part 1: Summary

PHA Name Beaufort Housing Authority		<input checked="" type="checkbox"/> Original 5-Year <input type="checkbox"/> Revision No.			
Development Number/Name/HA-Wide	Year 1 2005	Work Statement for Year 2 FFY Grant: 2006 PHA FY: 10/1/2006	Work Statement for Year 3 FFY Grant: 2007 PHA FY: 10/2/2007	Work Statement for Year 4 FFY Grant: 2008 PHA FY: 10/1/2008	Work Statement for Year 5 FFY Grant: 2009 PHA FY: 10/1/2009
	Annual Statement				
HA Wide		162,000.00	87,000.00	73,000.00	79,000.00
SC26-1 Scattered Apts.		199,000.00	125,000.00		30,000.00
SC26-2 Oak Hill Terrace		5,000.00	286,000.00		12,000.00
SC26-4 Sandalwood Terrace				323,000.00	152,500.00
SC26-6 Yemassee Heights				49,300.00	38,000.00
SC26-7 Marsh Pointe		19,500.00		145,000.00	
SC26-8 Single Family Homes		40,000.00			149,000.00
SC26-9 Duplex		10,500.00			
CFP Funds Listed for 5-year planning		436,000.00	498,000.00	590,300.00	460,500.00
Replacement Housing Factor Funds					

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

Activities for Year 1	Activities for Year: <u>2007</u> FFY Grant: <u>2006</u> PHA FY: <u>10/1/2006</u>			<u>2008</u> Activities for Year: FFY Grant: <u>2007</u> PHA FY:			
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost	
See Annual Statement							
		Total CFP Estimated Cost		€ -			€ -

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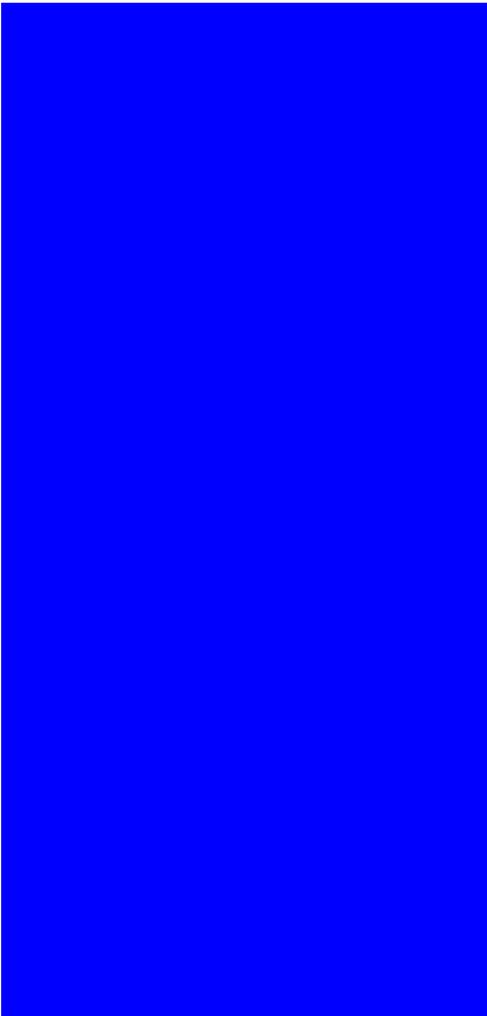
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wprq{d 9}~/WGPE{QUIT}

·:wprq{d 10}~/WGPE{QUIT}

}~:wprq{d 7}{r 1}~/WGPE{QUIT}

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

PHA Name: Beaufort Housing Authority	Grant Type and Number Capital Fund Program Grant No: CFP 501-03 Replacement Housing Factor Grant No: Attachment F	Federal FY of Grant: 2003
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Original Annual Statement
 Reserve for Disasters/Emergencies
 Revised Annual Statement (revision no.)

Performance and Evaluation Report for Program Year Ending -
 Final Performance and Evaluation Report **March 31,2005**

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	10,000.00	15,963.00	963.00	963.00
3	1408 Management Improvements	-	-	-	-
4	1410 Administration	1,800.00	2,000.00	-	-
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	13,500.00	29,000.00	29,000.00	29,000.00
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	92,000.00	73,000.00	3,950.00	3,950.00
10	1460 Dwelling Structures	305,000.00	194,420.00	56,464.00	17,050.00
11	1465.1 Dwelling Equipment - Nonexpendable	19,300.00	12,000.00	-	-
12	1470 Nondwelling Structures	-	-	-	-
13	1475 Nondwelling Equipment	7,720.00	32,542.00	31,055.00	31,055.00
14	1485 Demolition	-	-	-	-
15	1490 Replacement Reserve	-	-	-	-
16	1492 Moving to Work Demonstration	-	-	-	-
17	1495.1 Relocation Costs	-	-	-	-
18	1499 Development Activities	-	-	-	-
19	1501 Collaterization or Debt Service	-	-	-	-
20	1502 Contingency	-	-	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	\$ 449,320.00	\$ 358,925.00	\$ 121,432.00	\$ 82,018.00
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 Conversation Measures	-	-	-	-

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

PHA Name:		Grant Type and Number				Federal FY of Grant:		
Beaufort Housing Authority		Capital Fund Program Grant No: CFP 501-03 Replacement Housing Factor Grant Attachment F				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	Transfer to Operating	1406.00		10,000.00	15,963.00	963.00	963.00	
	Computer Software	1408.00						Delete
	Administration	1410.00		1,800.00	2,000.00			
	A/E Fees	1430.00		13,500.00	29,000.00	29,000.00	29,000.00	
	Cycle Painting	1460.00	30 Units	30,000.00	21,500.00	16,200.00	16,200.00	
	Prune Trees	1450.00		15,000.00	10,000.00	1,450.00	1,450.00	
	Replace Mower	1475.00		7,720.00	7,600.00	7,591.00	7,591.00	
	Admin Vehicle	1475.00			17,500.00	16,022.00	16,022.00	From 501-02
	Computer Hardware	1475.00			7,442.00	7,442.00	7,442.00	5 Yr Plan
SC26-1								
Scattered	Bath Vanity w/ Lavatory	1460.00	65 Units	30,000.00	40,000.00			
	Water Saver Toilets	1460.00	65 Units	22,000.00	15,000.00			
SC26-2								
Oak Hill T.	Upstairs Floor Repair	1460.00	14 Units	15,000.00				Delay
	New Floor Tile & Base	1460.00	39 Units	95,000.00				To 501-02
	Repairs to Lift Station	1450.00		27,000.00				To 501-02
SC26-4	Light Fixtures Kitchen	1460.00	80 Units		11,277.00			5 Yr Plan
Sandalwood	Water Saver Toilets	1460.00	80 Units	46,000.00	59,729.00			
	Replace Damaged Int.Doors	1460.00	40 Units		-			Delay
	Resurface Parking Lot	1450.00			50,000.00			5 Yr Plan
	Erosion Repairs	1450.00			8,000.00			5Yr Plan
SC26-6								
Yemassee H	Replace Exterior Door Locks	1460.00	50 Units	10,000.00				To 501-01
	Resurface Parking Lot	1450.00		50,000.00				Delay

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

PHA Name: Beaufort Housing Authority	Grant Type and Number Capital Fund Program Grant No: SC16P026502-03 Replacement Housing Factor Grant No: Attachment G	Federal FY of Grant: 2003
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Original Annual Statement
 Reserve for Disasters/Emergencies
 Revised Annual Statement (revision no.)

Performance and Evaluation Report for Program Year Ending -
 Final Performance and Evaluation Report **March 31,2005**

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	-	-	-	-
3	1408 Management Improvements	-	-	-	-
4	1410 Administration	-	-	-	-
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	-	-	-	-
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	-	-	-	-
10	1460 Dwelling Structures	71,531.00	-	71,531.00	68,531.00
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 Collaterization or Debt Service	-	-	-	-
20	1502 Contingency	-	-	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	\$ 71,531.00	\$ -	\$ 71,531.00	\$ 68,531.00
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 Conversation Measures	-	-	-	-

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

PHA Name: Beaufort Housing Authority	Grant Type and Number Capital Fund Program Grant No: CFP 501-04 Replacement Housing Factor Grant No: Attachment H	Federal FY of Grant: 2004
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Original Annual Statement
 Reserve for Disasters/Emergencies
 Revised Annual Statement (revision no.)
 Performance and Evaluation Report for Program Year Ending -
 Final Performance and Evaluation Report March 31,2005

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds				
2	1406 Operations	-	-	-	-
3	1408 Management Improvements	-	-	-	-
4	1410 Administration	2,000.00	2,000.00	-	-
5	1411 Audit	-	-	-	-
6	1415 Liquidated Damages	-	-	-	-
7	1430 Fees and Costs	11,500.00	11,500.00	11,500.00	5,250.00
8	1440 Site Acquisition	-	-	-	-
9	1450 Site Improvement	7,500.00	7,500.00	-	-
10	1460 Dwelling Structures	292,394.00	292,394.00	-	-
11	1465.1 Dwelling Equipment - Nonexpendable	47,200.00	47,200.00	-	-
12	1470 Nondwelling Structures	-	-	-	-
13	1475 Nondwelling Equipment	4,780.00	10,080.00	-	-
14	1485 Demolition	-	-	-	-
15	1490 Replacement Reserve	-	-	-	-
16	1492 Moving to Work Demonstration	-	-	-	-
17	1495.1 Relocation Costs	-	-	-	-
18	1499 Development Activities	-	-	-	-
19	1501 Collaterization or Debt Service	45,000.00	45,000.00	-	-
20	1502 Contingency	-	-	-	-
21	Amount of Annual Grant (Sum of lines 2-20)	\$ 410,374.00	\$ 415,674.00	\$ 11,500.00	\$ 5,250.00
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 Conversation Measures	-	-	-	-

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

PHA Name:		Grant Type and Number				Federal FY of Grant:		
Beaufort Housing Authority		Capital Fund Program Grant No: CFP 501-04 Replacement Housing Factor Grant Attachment H				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								
	Administration	1410.00		2,000.00	2,000.00			
	A/E Fees	1430.00		11,500.00	11,500.00	11,500.00	5,250.00	
	Cycle Painting	1460.00	25 Units	15,000.00	15,000.00			
	Maint. Utility Vehicle	1475.00			5,300.00			5 Year Plan
	Debt Service-Admin Build.	1501.00		45,000.00	45,000.00			
	HD Paper Shredder	1475.00						Delete
SC26-2	Replace Refrigerators	1465.10	38 units	15,200.00	15,200.00			
Oak Hill T.								
SC26-4	Replace Refrigerators	1465.10	80 Units	32,000.00	32,000.00			
Sandalwood								
SC26-6	New Mail Boxes w/Shelter	1450.00		7,500.00	7,500.00			
Yemassee H	Replace Floor Tile & Base	1460.00	50 units	104,989.00	104,989.00			
	New Water Saver Toilet	1460.00	50 units	10,000.00	10,000.00			
	New Vanities w/Sink	1460.00	50 units	30,000.00	30,000.00			
	Counter Tops & Cabinets Kitch.	1460.00	50 units	110,085.00	110,085.00			
SC26-8								
SF Homes	Replace Carpet w/ Floor Tile	1460.00	5 units	15,820.00	15,820.00			
	Replace Refrigerators	1475.00	12 Units	4,780.00	4,780.00			
	Install Window in Unit	1460.00	1 Unit	500.00	500.00			Emergency
	Replace Windows	1460.00	2 Units	6,000.00	6,000.00			Emergency
	TOTAL			415,674.00	415,674.00	11,500.00	5,250.00	

Attachment I–Progress Statement Regarding Five Year Goals

Goal: Expand the supply of assisted housing

1. BHA has increased its regular voucher program by 70 slots since the goal was established and has added an additional 22 vouchers in the HOME TBRA Program.
2. BHA leveraged \$50,000 in County funds with a \$300,000 HOME grant to create new single family homes for a lease purchase program. One home was sold and three are now in the HOME Rental Program.
3. BHA has leveraging Section 8 Administrative reserves to acquire additional housing for low income families / individuals. Four (4) homes have been acquired and are leased to low income families.

Goal: Improve the quality of assisted housing

1. BHA received high performer designation on the FY2000, FY 2001, FY 2002 FY 2003 and FY 2004 PHAS and SEMAP Programs.
2. HVAC has now been installed in all public housing units . We have improved curb appeal by increasing grounds keeping efforts and have implemented a “YARD OF THE MONTH” recognition program for residents.
3. We have made application to pledge a portion of future year capital funds as security for private borrowing to accelerate our capital and management improvement program.

Goal: Increase assisted housing choices

1. BHA has implemented a Voucher Homeownership Program
2. A homeownership counselor position has been added to the staff.

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

1. BHA continues to administer on FSS Program consisting of approximately 65 participants. We were successful in securing two grants totaling \$8,000 from a local bank for homebuyer development.
2. BHA has effective Resident Organizations in all developments.
3. BHA has a local preference for those families who are working or in a self-

improvement program. The percentage of families whose primary income source is employment or social security is 80% for public housing and 73% for Vouchers.

Goal: Ensure equal opportunity and affirmatively further fair housing objectives.

1. BHA continues to administer its housing programs ensuring that all applicants/residents are treated equally regardless of race, religion, natural origin, sex, or disability.

Required Attachment J - Membership of the Resident Advisory Board or Boards

List members of the Resident Advisory Board or Boards: (If the list would be unreasonably long, list organizations represented or otherwise provide a description sufficient to identify how members are chosen.)

Chairman Public Housing Marsh Pointe Representative	Ms. Annette Frazier 1730 Greenlawn Dr. # 114 Marsh Pointe Beaufort,SC 29902
Vice Chairman Section 8 Representative FSS	Ms.Michelle Green 15 Hillstead Lane Port Royal,SC 29935
Public Housing Sandalwood Terrace Representative	Ms. Betty Habersham 8 Southwood Park Drive #112 Sandalwood Terrace Hilton Head, South Carolina 29926
Public Housing Yemassee Heights Representative	Ms. Deborah Maxwell 21 Castle Hall Road #114 Yemassee Heights Yemassee, South Carolina 29945
Public Housing Oak Hill Terrace Representative	Mr. Freddie Whitaker 1650 Ribaut Rd. #103 Oak Hill Terrace Port Royal,SC 29936
Section 8 Representative FSS	Ms. Tanya Thomas 12 Doe Drive Beaufort, SC 29907

The BHA has Resident Councils in each development. Presidents of these Councils are elected by the residents and become members of the Resident Advisory Board. Section 8 representatives are appointed by staff and are FSS participants.

Attachment K

In accordance with 24CFR Part 960 the Beaufort Housing Authority adopted a Pet Ownership Policy on August 9,2000.A copy of this policy is on file at the Central Office and Development Offices.

Attachment L Deconcentration

The Beaufort Housing Authority shall endeavor to maintain a cross – section of incomes in its public housing developments. Family incomes for all HA developments will be analyzed to determine the adjusted average income by bedroom size. This same analysis will be performed for each development. The average incomes of each development will be compared with the average income for all developments. The goal is to have developments with an average income between 85% and 115% of the average income for all developments.

The Housing Authority may offer incentives to eligible families to locate in certain developments where income mix does not meet the goal. Additionally, the Housing Authority may utilize the practice of skipping a family's name on the waiting list as needed to accomplish the necessary income mix when offering a specific unit in a public housing development. Such necessary skipping will be specifically documented in the resident's file.

Attachment M– Section 8 Homeownership Capacity Statement

The Beaufort Housing Authority establishes a minimum homeowner downpayment requirement of at least 3 percent of the purchase price for participation in its Section 8 homeownership program, and requires that at least one percent of the purchase price come from the family's personal resources.