

# 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  
(exp 05/31/2006)

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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.

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# Streamlined 5-Year Plan for Fiscal Years 2005 - 2009

## Streamlined Annual Plan for Fiscal Year 2005

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

## Streamlined Five-Year PHA Plan Agency Identification

**PHA Name:** South Milwaukee CDA d/b/a Park Crest Housing

**PHA Number:** W1008

**PHA Fiscal Year Beginning:** 01/2005

**PHA Programs Administered:**

**Public Housing and Section 8**    
 **Section 8 Only**    
 **Public Housing Only**  
Number of public housing units:                      Number of S8 units:                      Number of public housing units: 60  
Number of S8 units:

**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

**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)

- X     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
- X     Public library
- PHA website
- Other (list below)

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

- X     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.

#### **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.

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

- A) PHA Goal: Expand the supply of assisted housing  
Objectives:  
1) Reduce public housing vacancies:  
2) SMHA will not pursue the construction of additional assisted housing units nor demolish any of the existing 60 units.
- B) PHA Goal: Improve the quality of assisted housing  
Objectives:  
1) Improve public housing management: (PHAS score) 94%  
2) Increase customer satisfaction:  
3) Concentrate on efforts to improve specific management functions:  
( list; e.g., public housing finance; voucher unit inspections)  
4) Continue to renovate or modernize public housing units:
- C) PHA Goal: Increase assisted housing choices  
Objectives:  
1) Conduct outreach efforts to potential voucher landlords  
2) Implement public housing site-based waiting lists:

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

A) PHA Goal: Provide an improved living environment

Objectives:

- 1) Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
- 2) Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
- 3) Implement public housing security improvements:

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

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

Objectives:

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

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

A) PHA Goal: Ensure equal opportunity and affirmatively further fair housing

Objectives:

- 1) Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:
- 2) 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:
- 3) Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:

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

**NONE**

PHA Name:  
HA Code:

5-Year Plan for Fiscal Years: 20\_\_ - 20\_\_

Annual Plan for FY 20\_\_

**INTENTIONALLY OMITTED**

**Streamlined Annual PHA Plan**  
**PHA Fiscal Year 2004**  
[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**

1. Housing Needs
2. Financial Resources
3. Policies on Eligibility, Selection and Admissions
4. Rent Determination Policies
5. Capital Improvements Needs
6. Demolition and Disposition
7. Homeownership
8. Civil Rights Certifications (included with PHA Certifications of Compliance)
9. Additional Information
  - a. PHA Progress on Meeting 5-Year Mission and Goals
  - b. Criteria for Substantial Deviations and Significant Amendments
  - c. Other Information Requested by HUD
    - i. Resident Advisory Board Membership and Consultation Process
    - ii. Resident Membership on the PHA Governing Board
    - iii. PHA Statement of Consistency with Consolidated Plan
    - iv. (Reserved)
10. Project-Based Voucher Program
11. Supporting Documents Available for Review
12. FY 2004 Capital Fund Program and Capital Fund Program Replacement Housing Factor, Annual Statement/Performance and Evaluation Report
13. Capital Fund Program 5-Year Action Plan
14. Other (List below, providing name for each item)

**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-LLL a, 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.

**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			
X 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	48		16
Extremely low income <=30% AMI	30	63%	
Very low income (>30% but <=50% AMI)	17	35%	
Low income (>50% but <80% AMI)	1	2%	
Families with children	40	85%	
Elderly families	6	13%	
Families with Disabilities	4	2%	
Race/ethnicity	23 white	47%	
Race/ethnicity	13 Hispanic	27%	
Race/ethnicity	10 black	22%	
Race/ethnicity	2 other	4%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	8	17%	0
2 BR	20	42%	16
3 BR	11	22%	0
4 BR	9	19%	0
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input type="checkbox"/> No X Yes			
If yes:			
How long has it been closed (# of months)? 2			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No X Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? X No Yes			

## B. Strategy for Addressing Needs

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

Parkcrest Housings' strategies would include expediting vacant unit turnarounds to ensure that Parkcrest Housing is making available housing in a timely manner. This would include hiring outside contractors to do work such as painting, cleaning and other duties necessary to expedite the availability of the unit in the event Parkcrest Housing has a number of units which become vacant at the same time.

Parkcrest Housing also inquires to whether an applicant wishes to claim a disability status and if so, to make sure all reasonable accommodations are met.

### (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:**

- 1) Employ effective maintenance and management policies to minimize the number of public housing units off-line
- 2) Reduce turnover time for vacated public housing units
- 3) Reduce time to renovate public housing units
- 4) Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- 5) Participate in the Consolidated Plan development process to ensure coordination with broader community strategies

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

Select all that apply

NOT APPLICABLE, NOT PART OF PLAN'S STRATEGY

**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

- 1) Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing
- 2) Employ admissions preferences aimed at families with economic hardships
- 3) Adopt rent policies to support and encourage work

**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

- 1) Employ admissions preferences aimed at families who are working
- 2) Adopt rent policies to support and encourage work

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

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

Select all that apply

- 1) Maintain designation of public housing for the elderly in two, one bedroom unit buildings.

**Need: Specific Family Types: Families with Disabilities**

**Strategy 1: Target available assistance to Families with Disabilities:**

Select all that apply

- 1) Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing.

**Need: Specific Family Types: Races or ethnicity's with disproportionate housing needs**

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

Select if applicable

- 1) Affirmatively market to races/ethnicities shown to have disproportionate housing needs

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

Select all that apply

NONE

**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:

1. Funding constraints

2. Staffing constraints
  3. Limited availability of sites for assisted housing
  4. Extent to which particular housing needs are met by other organizations in the community
  5. Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
  6. Influence of the housing market on PHA programs
  7. Community priorities regarding housing assistance
8. Results of consultation with residents and/or the Resident Advisory Board

**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.

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY ____ grants)</b>		
a) Public Housing Operating Fund	\$68,701	
b) Public Housing Capital Fund		
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance		
f) Resident Opportunity and Self-Sufficiency Grants		
g) Community Development Block Grant		
h) HOME		
Other Federal Grants (list below)		
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
W139P008501-03	\$58,445	Improvements
W1008-001-04D	\$18,803	Operations
W139P008501-04	\$28,785	Operations
W139P008501-04	\$75,860	Dwelling improvements
<b>2. Sub Total PRIOR YEAR FEDERAL GRANTS</b>	<b>\$181,893</b>	Operations & improvements
<b>3. Public Housing Dwelling Rental Income</b>	<b>\$209,145</b>	Operations
<b>4. Other income (list below)</b>	<b>\$22,107</b>	Fees ( late fees, maintenance, repairs, dryer, etc.)
<b>4. Non-federal sources (list below)</b>		

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>Total resources</b>	<b>\$481,846</b>	

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

**(2)Waiting List Organization**

- a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)
  - 1) Community-wide list
- b. Where may interested persons apply for admission to public housing?
  - 1) PHA main administrative office
- 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. NO.

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? NONE

3. How many unit offers may an applicant turn down before being removed from the site-based waiting list? NOT APPLICABLE

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? NONE
2.  Yes  No: Are any or all of the PHA’s site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD-approved site based waiting list plan)?  
If yes, how many lists?

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

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

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

**(3) Assignment**

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

- One
- X  Two
- Three or More

b. Yes: 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:

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

b. Transfer policies:

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

1. Emergencies
2. Over-housed
3. Under-housed
4. Medical justification
5. Administrative reasons determined by the PHA (e.g., to permit modernization work)
6. Resident choice: (state circumstances below)

c. Preferences

1. 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:

NONE

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

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

Date and Time

Former Federal preferences:

NONE

Other preferences (select all that apply)

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

4. Relationship of preferences to income targeting requirements:

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)

- 1) The PHA-resident lease
- 2) The PHA's Admissions and (Continued) Occupancy policy
- 3) PHA briefing seminars or written materials

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

apply)

- 1) At an annual reexamination and lease renewal
- 2) Any time family composition changes
- 3) At family request for revision

**(6) Deconcentration and Income Mixing**

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)]

**B. Section 8**

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

**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 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)  
\$29

2. 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

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: DOES NOT APPLY.

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

NONE

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

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

1) For all developments

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

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

1) Market comparability study

2) Fair market rents (FMR)

3) The "rental value" of the unit

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)

1) Any time the family experiences an income increase

g. 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.)

- 1) Survey of rents listed in local newspaper
- 2) Survey of similar unassisted units in the neighborhood
- 3) Fair Market Rents

## **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.

## **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                      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. 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. 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:
- c. 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. 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. 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. 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.)

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

7. Timeline for activity:
- a. Actual or projected start date of activity:
  - b. Projected end date of activity:

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

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

- (1) 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 (DOES NOT APPLY / NOT APPLICABLE)**

a. Size of Program

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

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

b. PHA established eligibility criteria

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

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

### **(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 - 2005).*

➤ **The status of the following capital improvement goals are as follows:**

- Toddler playscape built (2000) and demolished (2003). Demolished because it attracted gangs, alcohol, and unknown individuals were removing screws and bolts so residents could potentially be seriously injured.
- Replacement exterior faucets: completed.
- General landscape: completed
- Replacement steel storm doors: completed
- Basement stationary tubs and faucet fixtures: completed
- Screening of dumpsters: completed
- Replace all parking lot asphalt surfaces: replaced westerly parking area only, resurfaced remainder
- Sidewalk replacement: approximately 10% replaced. Determined to be done on a case by case basis as needed.
- Replace hot water tanks: completed
- Basement foundation and waterproofing: completed.

➤ **Policy and Procedure Changes:**

- New Admissions, Occupancy and Rental Policy completed 2/2003.
- New lease document completed 2003.
- Grievance filing days from 14 to 5 days changed.

➤ **Safety and Crime Prevention Measures:**

- On-site maintenance quick response to repairing damaged locks, screens, and broken windows for safety and crime prevention preventive measures.
- Increased level of lighting around the development.
- Hired outside security guard firm.
- Continue to accurately screen and process new tenant applicants.

### **B. Criteria for Substantial Deviations and Significant Amendments**

#### **(1) Amendment and Deviation Definitions**

24 CFR Part 903.7(r)

a. Substantial Deviations / Modifications and Significant Amendments:

- Changes to rent or admissions policies or organization of the waiting list;
- Additions of non-emergency work items
- Any change with regard to demolition or disposition, designations, homeownership programs or conversion activities.

### **C. Other Information**

[24 CFR Part 903.13, 903.15]

#### **(1) Resident Advisory Board Recommendations**

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

If yes, provide the comments below:

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: (list below)

#### **(2) Resident Membership on PHA Governing Board**

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

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

No: PHA about to convene an election for a new member. Two tenants volunteered to serve on governing board. Election held March 2004.

If yes, complete the following:

Name of Resident Member of the PHA Governing Board: Jodie Marlowe

Method of Selection:

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)

Self-nomination: Candidates registered with the PHA and requested a place on ballot

Eligible candidates: (select one)

1) Any head of household receiving PHA assistance or head of household in the lease agreement if not receiving any PHA assistance.

Eligible voters: (select all that apply)

Other (list): head of household receiving PHA receiving PHA assistance or head of household in the lease agreement if not receiving any PHA assistance

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

NOT APLICABLE

Date of next term expiration of a governing board member: not applicable

Name and title of appointing official(s) for governing board (indicate appointing official for the next available position): John W. Leupold, Executive Director of PHA, to recommend appointment to board after election is held and board will approve appointment for a term of one year.

### **(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: (provide name here)**

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):

X The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.

X Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)

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

#### **(4) (Reserved)**

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

### **10. Project-Based Voucher Program**

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

If yes, check which circumstances apply:

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

- 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.

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Related Plan Component</b>
YES	<i>PHA Certifications of Compliance with the PHA Plans and Related Regulations and Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans.</i>	Standard 5 Year and Annual Plans; streamlined 5 Year Plans
	State/Local Government Certification of Consistency with the Consolidated Plan.	5 Year Plans
YES	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
	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
YES	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources
YES	Public Housing Admissions and (Continued) Occupancy Policy (A&O/ACOP), which includes the Tenant Selection and Assignment Plan [TSAP] and the Site-Based Waiting List Procedure.	Annual Plan: Eligibility, Selection, and Admissions Policies
	Any policy governing occupancy of Police Officers and OverIncome 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
	Section 8 Administrative Plan	Annual Plan: Eligibility,

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Related Plan Component</b>
		Selection, and Admissions Policies
YES	Public housing rent determination policies, including the method for setting public housing flat rents. <input type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
	Schedule of flat rents offered at each public housing development. <input type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
	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 type="checkbox"/> Check here if included in Section 8 Administrative Plan.	Annual Plan: Rent Determination
YES	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
YES	Results of latest Public Housing Assessment System (PHAS) Assessment (or other applicable assessment).	Annual Plan: Management and Operations
	Follow-up Plan to Results of the PHAS Resident Satisfaction Survey (if necessary)	Annual Plan: Operations and Maintenance and Community Service & Self-Sufficiency
	Results of latest Section 8 Management Assessment System (SEMAP)	Annual Plan: Management and Operations
	Any policies governing any Section 8 special housing types <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Operations and Maintenance
	Consortium agreement(s).	Annual Plan: Agency Identification and Operations/ Management
YES	Public housing grievance procedures <input type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Grievance Procedures
	Section 8 informal review and hearing procedures. <input type="checkbox"/> Check here if included in Section 8 Administrative Plan.	Annual Plan: Grievance Procedures
YES	The Capital Fund/Comprehensive Grant Program Annual Statement /Performance and Evaluation Report for any active grant year.	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grants.	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans, or any other approved proposal for development of public housing.	Annual Plan: Capital Needs
	Self-evaluation, Needs Assessment and Transition Plan required by regulations implementing Section 504 of the Rehabilitation Act and the Americans with Disabilities Act. See PIH Notice 99-52 (HA).	Annual Plan: Capital Needs
	Approved or submitted applications for demolition and/or disposition of public housing.	Annual Plan: Demolition and Disposition
	Approved or submitted applications for designation of public housing (Designated Housing Plans).	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act, Section 22 of the US Housing Act of 1937, or Section 33 of the US Housing Act of 1937.	Annual Plan: Conversion of Public Housing
	Documentation for required Initial Assessment and any additional information required by HUD for Voluntary Conversion.	Annual Plan: Voluntary Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans.	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program (Section _____ of the Section 8 Administrative Plan)	Annual Plan: Homeownership

PHA Name:  
HA Code:

5-Year Plan for Fiscal Years: 20\_\_ - 20\_\_

Annual Plan for FY 20\_\_

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Related Plan Component</b>
	Public Housing Community Service Policy/Programs <input type="checkbox"/> Check here if included in Public Housing A & O Policy	Annual Plan: Community Service & Self-Sufficiency
	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
	FSS Action Plan(s) for public housing and/or Section 8.	Annual Plan: Community Service & Self-Sufficiency
	Section 3 documentation required by 24 CFR Part 135, Subpart E for public housing.	Annual Plan: Community Service & Self-Sufficiency
	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
YES	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
YES	The results of the most recent fiscal year audit of the PHA conducted under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings.	Annual Plan: Annual Audit
	Consortium agreement(s), if a consortium administers PHA programs.	Joint PHA Plan for Consortia
	Consortia Joint PHA Plans ONLY: Certification that consortium agreement is in compliance with 24 CFR Part 943 pursuant to an opinion of counsel on file and available for inspection	Joint PHA Plan for Consortia
	Other supporting documents (optional). List individually.	(Specify as needed)

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

<b>Annual Statement/Performance and Evaluation Report</b>					
<b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary</b>					
<b>PHA Name:</b> South Milwaukee CDA d/b/a Parkcrest Housing		<b>Grant Type and Number</b> WI39P008501-05 Capital Fund Program Grant No: Replacement Housing Factor Grant No:			<b>Federal FY of Grant:</b>
<input checked="" type="checkbox"/> <b>Original Annual Statement</b> <input type="checkbox"/> <b>Reserve for Disasters/ Emergencies</b> <input type="checkbox"/> <b>Revised Annual Statement (revision no: )</b> <input type="checkbox"/> <b>Performance and Evaluation Report for Period Ending:</b> <input type="checkbox"/> <b>Final Performance and Evaluation Report</b>					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	\$70,000			
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit	\$5,000			
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$6,600			
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	\$78,900			
11	1465.1 Dwelling Equipment—Nonexpendable	\$15,300			
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	\$29,900			
14	1485 Demolition				
15	1490 Replacement Reserve	\$59,400			
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency	\$8,900			
21	Amount of Annual Grant: (sum of lines 2 – 20)	<b>\$274,000</b>			
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	\$80,000			
25	Amount of Line 21 Related to Security – Hard Costs	\$74,600			
26	Amount of line 21 Related to Energy Conservation Measures	\$24,000			

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

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: South Milwaukee CDA d/b/a/ Parkcrest Housing			Grant Type and Number WI39P008501-05 Capital Fund Program Grant No: Replacement Housing Factor Grant No:			Federal FY of Grant: 2005		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
Operations	Annual Negative Net Operating Income	1406	N/A	\$70,000				
Audit	Annual audit fee	1411	1	\$5,000				
Fees & costs	Architectural, construction management, etc.	1430	N/A	\$6,600				
Dwelling structures	energy efficient water closets	1460	60	\$24,000				
Dwelling structures	Replace basement stairs	1460	60	\$54,000				
Dwelling structures	Repair & paint fire escapes	1460	200 S.F.	\$900				
Dwelling equipment non-expendable	Dryer vent covers	1465.1	60	\$1,500				
Dwelling equipment non-expendable	Bathroom exhausts	1465.1	60	\$13,800				
Non-dwelling equipment	Sump pump units	1475	60	\$900				
Replacement reserves	Windows, roof, parking lot	1490	N/A	\$59,400				
Contingency		1502	N/A	\$8,900				
Non-dwelling equipment	New truck with plow	1475	1	\$29,000				
<b>Total</b>				<b>\$274,000</b>				

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

<b>Annual Statement/Performance and Evaluation Report</b> <b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)</b> <b>Part II: Supporting Pages</b>								
PHA Name: South Milwaukee CDA d/b/a/ Parkcrest Housing		Grant Type and Number <b>WI39P008501-05</b> Capital Fund Program Grant No: Replacement Housing Factor Grant No:			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	

### 13. Capital Fund Program Five-Year Action Plan

Annual Statement/Performance and Evaluation Report							
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)							
Part III: Implementation Schedule							
PHA Name: South Milwaukee CDA d/b/a/ Parkcrest Housing			Grant Type and Number Capital Fund Program No: WI39P008501-05 Replacement Housing Factor No:				Federal FY of Grant: 2005
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
1406-Operations	On going						
1411-Audit	12/2005						
1430-Fees & costs	On going						
1460-Dwelling structures water closets	03/2005						
1460-Dwelling structures replace basement stairs	06/2005						
1460-dwelling structures repair a& paint fire escapes	06/2005						
1465.1-Dwelling equip. non exp. Dryer vent covers	03/2005						
1465.1-Dwelling equip. non exp. Bathroom exhausts	09/2005						
1475 non dwelling equip. sump pump units	09/2005						
1490-Replacement reserves	On going						
1502-Contingency	On going						
1475-Nondwelling equip. truck & plow	03/2005						

**13. Capital Fund Program Five-Year Action Plan**

<b>Annual Statement/Performance and Evaluation Report</b> <b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)</b> <b>Part III: Implementation Schedule</b>							
PHA Name: South Milwaukee CDA d/b/a/ Parkcrest Housing		<b>Grant Type and Number</b> Capital Fund Program No: WI39P008501-05 Replacement Housing Factor No:			<b>Federal FY of Grant: 2005</b>		
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	

### **13. Capital Fund Program Five-Year Action Plan**

<b>Capital Fund Program Five-Year Action Plan</b>					
<b>Part I: Summary</b>					
PHA Name South Milwaukee CDA d/b/a/ Parkcrest Housing					<input checked="" type="checkbox"/> <b>Original 5-Year Plan</b> <input type="checkbox"/> <b>Revision No:</b>
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: WI39P008501-05 PHA FY: 2006	Work Statement for Year 3 FFY Grant: WI39P008501-05 PHA FY: 2007	Work Statement for Year 4 FFY Grant: WI39P008501-05 PHA FY: 2008	Work Statement for Year 5 FFY Grant: WI39P008501-05 PHA FY: 2009
	Annual Statement				
1460- dwelling structure replace entry doors/frames & hardware		\$75,000	\$75,000		
1430-fees & costs		\$6,000	\$6,800	\$6,800	\$7,400
1475- tractor with snow plow			\$15,000		
1465.1 replace sump pumps in all units			\$16,200		
1490 Replacement Reserves		\$55,000	\$55,000	\$55,000	\$55,000
1450 sidewalk repair				\$5,000	

### 13. Capital Fund Program Five-Year Action Plan

1460 install leaf guard gutter				\$20,200	
1460 replace bath tubs and shower modules, vanity, and lavatory				\$89,000	
1460-replace kitchen cabinets incl. Sink & toilets					\$110,000
1450 - reconstruct parking lot					
1465.1 hot water heater replacements					\$24,600
1465.1 replace refrigerators					\$30,000
1460 replace flooring					\$27,000
1460 replace windows Phase 1					\$40,000
					\$70,000
<b>Total</b>				<b>\$136,000</b>	<b>\$168,000</b>
				<b>\$176,000</b>	<b>\$364,000</b>
CFP Funds Listed for 5-year planning					
Replacement Housing Factor Funds					



### 13. Capital Fund Program Five-Year Action Plan

Total CFP Estimated Cost			\$136,000		\$168,000

Capital Fund Program Five-Year Action Plan					
Part II: Supporting Pages—Work Activities					
Activities for Year : 2008 FFY Grant: WI39P008501-05 PHA FY: 2008			Activities for Year: 2009 FFY Grant: WI39P008501-05 PHA FY: 2009		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
Fees & costs 1430	Architecture, construction management, etc	\$6,800	Fees & costs 1430	Architecture, construction management, etc	\$7,400
Replacement reserve 1490	Kitchen cabinets, parking lot, hot water heaters, refrigerators, flooring, windows	\$55,000	Replacement reserve 1490	Kitchen cabinets, parking lot, hot water heaters, refrigerators, flooring, windows	\$55,000
Site improvement 1450	Replace / repair sidewalk	\$5,000	Dwelling structure 1460	Replace kitchen cabinets, incl. Sink	\$110,000
1460 Dwelling structure	Install leaf gutter guard	\$20,200	Site improvement 1450	Reconstruct parking lot	\$24,600
Dwelling structure 1460	Replace bath tub, shower modules, vanity & lavatory	\$89,000	Dwelling equipment 1465.1	Replace hot water heaters	\$30,000
			Dwelling equipment 1465.1	Replace refrigerators	\$27,000
			Dwelling structure 1460	Replace flooring	\$40,000
			Dwelling structure 1460	Replace windows Phase 1	\$70,000



### **13. Capital Fund Program Five-Year Action Plan**

c) **Funding source**: normal-operating funds from rent and other income.

#### 2) **Communication**:

a) **Action**: PHA prides itself on communicating to tenants about upcoming activities and projects with monthly Newsletter delivered to tenants door. Newsletter monthly circulation ongoing for past three years.

b) **Target date of completion**: 03/01/05.

c) **Funding source**: not applicable.

#### 3) **Neighborhood appearance**

a) **Action**: Newsletter announcement to tenants that Public Park immediately adjacent to PHA with soccer fields, baseball diamonds, and general recreation area for picnics, etc. are available to tenants throughout the year.

b) **Target date of completion**: 4/1/05.

c) **Source of funds**: not applicable.