

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

Housing Authority of the City of Lakeland, Florida

PHA Plans

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

**NOTE: THIS PHA PLANS TEMPLATE (HUD 50075) IS TO BE COMPLETED IN ACCORDANCE WITH
INSTRUCTIONS LOCATED IN APPLICABLE PIH NOTICES**

**PHA Plan
Agency Identification**

PHA Name: Lakeland Housing Authority

PHA Number: FL 011

PHA Fiscal Year Beginning: 1/2006

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

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

Display Locations For PHA Plans and Supporting Documents: The PHA Plans (including attachments) are available for public inspection at: (select all that apply)

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

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

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

5-YEAR PLAN
PHA FISCAL YEARS 2005 - 2009
[24 CFR Part 903.5]

A. Mission

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

The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.

The PHA's mission is: (state mission here):

To provide quality, affordable housing and self-sufficiency opportunities in an effective and professional manner.

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 through development of new units under HOPE VI, other affordable housing opportunities and acquisition of additional housing vouchers.**

Objectives:

- Apply for additional rental vouchers:
- Reduce public housing vacancies:
- Leverage private or other public funds to create additional housing opportunities:
- Acquire or build units or developments:
- Other (list below):

PHA Goal: Improve the quality of assisted housing

Objectives:

- Improve public housing management: (PHAS score)
- Improve voucher management: (SEMAP score)
- Increase customer satisfaction
- Concentrate on efforts to improve specific management functions
- Renovate or modernize public housing units:.

- Demolish or dispose of obsolete public housing
- Provide replacement public housing:
- Provide replacement vouchers:
- Other: (list below)

PHA Goal: Increase assisted housing choices

Objectives:

- Provide voucher mobility counseling:
- Conduct outreach efforts to potential voucher landlords
- Increase voucher payment standards
- Implement voucher homeownership program:
- Implement public housing or other homeownership programs:
- Implement public housing site-based waiting lists:
- Convert public housing to vouchers:
- Other: (list below)

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

PHA Goal: Provide an improved living environment

Objectives:

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

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

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

Objectives:

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

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

PHA Goal: Ensure equal opportunity and affirmatively further fair housing

Objectives:

- Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, gender, 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, gender, familial status, and disability:
- Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
- Other: (list below)

Other PHA Goals and Objectives: (list below)

Goal #1: Having become a high performing housing authority in both the Public Housing and Section 8 programs, LHA shall sustain it.

Objective #1: Improve the accuracy of rent calculation and the sufficiency of the documentation in tenant files in both public housing and Section 8 so that quality control indicates an accuracy rate in excess of HUD program high performance standards by December 31, 2006 and sustain it thereafter.

Objective #2: Maintain a Section 8 lease-up rate of at least 98%.

Objective #3: Continue and improve task tracking / management by objectives which incorporates appropriate elements of PHAS, SEMAP, CSS Workplan and similar existing measures.

Goal #2: Continue to improve our public image through enhanced communication, coordination, and accountability with outside entities, among the staff and with residents.

Objective #1: Continue to meet monthly with the Resident Advisory Board and other residents in a variety of forums to provide the opportunity for input and feedback about agency operations.

Objective #2: Generate at least 8 positive media stories a year.

Objective #3: Deliver at least 24 talks to groups a year about the activities of LHA, including; but not limited to, governmental, private sector, public sector, civic, religious, women, and minority organizations.

Goal #3: Be the premier innovative and effective affordable housing provider in Florida.

Objective #1: Utilize LHA's role as the HOPE VI developer to implement the remaining phases by end of the HOPE VI grant period.

Objective #2: Develop staff and organizational capability so that LHA or an affiliate is prepared to manage its third-party owned rental properties by December 31, 2005.

Objective #3: Maintain eligibility to apply for additional housing choice vouchers as they become available.

Objective #4: Partner with the Lakeland Polk Housing Corporation and other housing providers to increase the availability of affordable housing in its jurisdiction by 500 units by December 31, 2009.

Objective #5: Assist at least 20 families into homeownership through the Section 8 Homeownership Program by December 31, 2009.

Objective #6: Expand the LHA business plan to include non-traditional entrepreneurial methods and practices that positively impact affordable housing in LHA's jurisdiction.

Goal #4: Implement income generating and cost saving measures while increasing operational efficiency in order to reduce LHA's dependency on HUD funding.

Objective #1: Complete implementation of the Energy and Water Cost savings programs by December 31, 2007.

Objective #2: By December 31, 2006 begin marketing LHA staffing assets to others.

Objective #3: Develop and implement a plan to obtain \$50 million of grant or leveraged funds by December 31, 2009 and ensure compliance with all grant agreements.

Objective #4: Maximize the HUD funding systems (including the Tenant Integrity Program) to better fund LHA without unduly burdening the residents.

Goal #5: Increase and encourage the self-sufficiency efforts of all residents.

Objective # 1: Assist children who reside in LHA properties to attain academic success as measured by increases in FCAT scores so that the percentage passing the FCAT equals or exceeds the Polk County average.

Objective #2: Increase the number of children using LHA educational and computer literacy programs by 20% by December 31, 2009.

Objective #3: Adult residents will be afforded the opportunity to increase their literacy skills and to continue their adult educational goals through the use of Technical Learning Centers so that at least an additional 20% have either a high school diploma or GED by December 31, 2009.

Objective #4: LHA shall assist its non-elderly non-disabled public housing residents increase the LHA average annual household income by 35% by December 31, 2009.

Objective #5: substantially increase the number of LHA seniors and people with disabilities using LHA sponsored programs by December 31, 2009.

Objective #6: Increase the number of people participating in the LHA Public Housing Family Self-Sufficiency Program to 50 by December 31, 2009.

Goal #6: Improve employee relations and morale.

Objective #1: Improve lines of communications through staff meetings and other necessary internal communications to provide updates and progress reports about agency activities.

Objective #2: Continue to reward performance through the timely implementation of the performance evaluation / merit increase system.

Objective #3: Encourage and support staff partaking in continuing education opportunities to the greatest degree possible within funding constraints.

Annual PHA Plan
PHA Fiscal Year 2006
[24 CFR Part 903.7]

i. Annual Plan Type:

Select which type of Annual Plan the PHA will submit.

Standard Plan

Streamlined Plan:

High Performing PHA

Small Agency (<250 Public Housing Units)

Administering Section 8 Only

Troubled Agency Plan

ii. Executive Summary of the Annual PHA Plan

[24 CFR Part 903.7 9 (r)]

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

According to the latest HUD instructions, this section does not have to be completed.

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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

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Attachments

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

Required Attachments:

- Admissions Policy for Deconcentration (Attachment A)
- FY 2006 Capital Fund Program Annual Statement (Attachment B)
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

Optional Attachments:

- PHA Management Organizational Chart (Attachment C)
- FY 2006 Capital Fund Program 5 Year Action Plan (Attachment D)
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text) – Attachment Q
- Other (List below, providing each attachment name)
 - Definition of Substantial Modification (Attachment E)
 - Resident Membership on the Board (Attachment F)
 - RAB Membership (Attachment G)
 - Progress on the 5-Year Plan (Attachment H)
 - 2003 CFP P&E (Attachment I)
 - 2004 CFP (Attachment J)
 - 2004 HRF (Attachment K)
 - 2005 CFP and HRF P&E (Attachment L)
 - 2006 HRF (Attachment M)
 - Pet Policy (Attachment N)
 - Voluntary Conversion Insert (Attachment O)
 - Section 8 Homeownership Capacity Statement (Attachment P)
 - Community Service Description (Attachment R)

Supporting Documents Available for Review

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
Tab A	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
Tab B	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
Tab C	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	5 Year and Annual Plans
Tab D	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
Tab E	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
Tab F	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
Tab G	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
Tab H	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
	Public housing rent determination policies, including the methodology 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
Tab I	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	Annual Plan: Rent

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	<input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Determination
Tab J	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
Tab K	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 checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
Tab L	Approved HOPE VI Revitalization Plans 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
Tab M	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
Tab N	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
Tab O	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program <input checked="" type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
Tab P	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
Tab Q	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
	The most recent Public Housing Drug Elimination Program (PHDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
Tab R	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
Tab S	Dakota Park Management Plan	Public Housing/LIHTC
Tab T	Washington Ridge Management Plan	Public Housing/LIHTC
Tab U	Dakota Park Regulatory and Operating Agreement	Public Housing/LIHTC
Tab V	Washington Ridge Regulatory and Operating Agreement	Public Housing/LIHTC
Tab W	Dpark/Wridge Closing Doc's (See Ex.Dir. bookshelf #4)	Public Housing/LIHTC
Tab X	HOME Grant application	Public Housing/LIHTC
Tab Y	FHLB Afford. Hsg. Program Grant application	Public Housing/LIHTC
Tab Z	Washington Ridge Senior Center Management Plan	Public Housing/LIHTC
N/A	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

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

Based upon the information contained in the Consolidated Plan/s applicable to the jurisdiction, and/or other data available to the PHA, provide a statement of the housing needs in the jurisdiction by completing the following table. In the "Overall" Needs column, provide the estimated number of renter families that have housing needs. For the remaining characteristics, rate the impact of that factor on the housing needs for each family type, from 1 to 5, with 1 being

“no impact” and 5 being “severe impact.” Use N/A to indicate that no information is available upon which the PHA can make this assessment.

Housing Needs of Families in the Jurisdiction							
By Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ability	Size	Location
Income <= 30% of AMI	1997	5	5	5	5	5	5
Income >30% but <=50% of AMI	1520	4	4	4	4	4	4
Income >50% but <80% of AMI	2403	3	3	3	3	3	3
Elderly	1662	4	4	4	4	4	4
Families with Disabilities	Un-known						
Black	1952	3	3	3	3	3	3
Hispanic	259	3	3	3	3	3	3
Race/Ethnicity							
Race/Ethnicity							

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

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

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

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

Housing Needs of Families on the Waiting List

Waiting list type: (select one)

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

	# of families	% of total families	Annual Turnover
Waiting list total	391		88
Extremely low income <=30% AMI	281	72	
Very low income (>30% but <=50% AMI)	91	23	
Low income (>50% but <80% AMI)	19	5	
Families with children	273	70	
Elderly families	34	9	
Families with Disabilities	84	21	
Race/ethnicity - Mixed	5	1	
Race/ethnicity - Black	227	58	
Race/ethnicity - White	158	40	
Race/ethnicity - Indian	0	0	
Race/ethnicity - Asian	1	1	

Characteristics by Bed-room Size (PH Only)			
1BR	153	39	8
2 BR	141	36	62
3 BR	78	20	17
4 BR	17	4	1
5 BR	2	1	0
5+ BR			

Is the waiting list closed (select one)? No Yes If yes: How long has it been closed (# of months)?

Does the PHA expect to reopen the list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even if generally closed? No Yes

This was accurate as of July 6, 2005

Housing Needs of Families on the Waiting List

Waiting list type: (select one)			
<input checked="" type="checkbox"/>	Section 8 tenant-based assistance		
<input type="checkbox"/>	Public Housing		
<input type="checkbox"/>	Combined Section 8 and Public Housing		
<input type="checkbox"/>	Public Housing Site-Based or sub-jurisdictional waiting list (optional)		
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	803		125
Extremely low income <=30% AMI	659	82	
Very low income (>30% but <=50% AMI)	136	17	
Low income (>50% but <80% AMI)	8	1	
Families with children	699	87	
Elderly families	44	5	
Families with Disabilities	60	7	
Mixed	6	1	
White	227	28	
Black	567	71	
Native American	1	<1	
Asian	2	<1	
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)? August, 2004 except for FUP			
Does the PHA expect to reopen the list in the PHA Plan year? <input checked="" 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 checked="" type="checkbox"/> Yes, FUP only			

This was accurate as of July 6, 2005.

C. Strategy for Addressing Needs

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

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

Select all that apply

- Employ effective maintenance and management policies to minimize the number of public housing units off-line
- Reduce turnover time for vacated public housing units:
- Reduce time to renovate public housing units:
- Seek replacement of public housing units lost to the inventory through mixed finance development. **See Supporting Document: HOPE VI Revitalization Plan.**
- 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)

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

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)

Maintain designation of Cecil Gober for elderly occupancy.

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

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

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

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

Select if applicable

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

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

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

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

(2) Reasons for Selecting Strategies

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

- Funding constraints
- Staffing constraints
- Limited availability of sites for assisted housing
- Extent to which particular housing needs are met by other organizations in the community

- Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
- Influence of the housing market on PHA programs
- Community priorities regarding housing assistance
- Results of consultation with local or state government
- Results of consultation with residents and the Resident Advisory Board
- Results of consultation with advocacy groups
- Other: (list below)

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

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

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2006 grants)		
a) Public Housing Operating Fund	1,032,234	
b) Public Housing Capital Fund	650,000	
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	6,215,593	
f) Public Housing Neighborhood Networks	300,000 & 150,000	
g) Resident Opportunity and Self-Sufficiency Grants-Homeown.	250,000	
Resident Opportunity and Self-Sufficiency Grants-Elderly	250,000	
	250,000	
h) Community Development Block Grant	0	

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
i) Youthbuild	400,000	
Other Federal Grants (list below)		
RHF Funds	601,210	Replacement Units
Self-Sufficiency Coordinator	64,900	Section 8 Supportive Services
2. Prior Year Federal Grants (unobligated funds only) (list below)		
HOPE VI	4,998,746	Capital Improvements
CFP03	216,513	Capital Improvements
CFP04	416,555	Capital Improvements
CFP04-RHF	177,310	Replacement Housing
CFP05	547,158	Capital Improvements
CFP05-RHF	580,540	Replacement Housing
3. Public Housing Dwelling Rental Income	396,915	Public Housing Operations
4. Other income (list below)		
Administrative Reserve Interest	4,575	Section 8 Tenant Based Assistance
Investment Income	12,000	Public Housing Operations
Entrepreneurial Activities	57,000	Public Housing Operations
4. Non-federal sources (list below)		
AHP Grant	\$500,000	Public Housing Capital Improvements
Total resources	\$18,071,249	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.7 9 (c)]

A. Public Housing

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

(1) Eligibility

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

- When families are within a certain number of being offered a unit: (state number)
- When families are within a certain time of being offered a unit: (state time)

Other: (describe) **When they get near the top of the waiting list or immediately if there is no waiting list.**

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

- Criminal or Drug-related activity
- Rental history
- Housekeeping
- Other (describe)

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

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

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

(2)Waiting List Organization

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

- Community-wide list
- Sub-jurisdictional lists
- Site-based waiting lists (HOPE VI sites only)
- Other (describe)

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

- PHA main administrative office
- PHA development site management office (mgmt. offices at H6 developments)
- Other (list below)

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

1. How many site-based waiting lists will the PHA operate in the coming year? **4 Dakota Park, Washington Ridge, The Manor, and Greater Lakeland**

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 **2 – The Manor and Greater Lakeland (name change)**

3. Yes No: May families be on more than one list simultaneously
If yes, how many lists? **5**

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 **If a unit is refused for other than a valid reason, they are not housed for six months**
- Two
- Three

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

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

(4) Admissions Preferences

a. Income targeting:

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

b. Transfer policies:

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

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

c. Preferences

- 4 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)

Lived in Washington Park or Lake Ridge Homes after August, 1999, or Dakota Park after January 2002 and who desire to move into HOPE VI sponsored replacement rental housing

A qualified purchaser of a HOPE VI sponsored Homeownership unit

Absence of a Proscribed Crime Preference (see ACOP glossary)

Absence of Misdemeanors

Voter Registration

Enrolled in School (school-aged children)

3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on.

If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

Date and Time

Former Federal preferences:

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

5 Victims of domestic violence

Substandard housing

Homelessness

High rent burden

Other preferences (select all that apply)

3 Working families and those unable to work because of age or disability

Veterans and veterans' families

5 Residents who live and/or work in the jurisdiction

5 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)

- 1 Lived in Washington Park or Lake Ridge Homes after August, 1999, or Dakota Park after January 2002 and who desire to move into HOPE VI sponsored replacement rental housing**
- 1 A qualified purchaser of a HOPE VI sponsored Homeownership unit**
 - 2 Absence of Proscribed Crime Preference (see ACOP Glossary)**
 - 4 Absence of Misdemeanors**
 - 5 Voter Registration**

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 as follows:

Deconcentration Policy for Covered Developments			
Development Name:	Number of Units	Explanation (if any) [see step 4 at §903.2(c)(1)(iv)]	Deconcentration policy (if no explanation) [see step 5 at §903.2(c)(1)(v)]
		Although Dakota Park is above 115%, it is less than 30% of AMI	

B. Section 8

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

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

(1) Eligibility

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

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

See Section 4.7 of the Section 8 Administrative Plan for various Grounds for Denial.

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

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

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

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

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

Forwarding address of departing tenant when there is a balance on the tenant's account.

(2) Waiting List Organization

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

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

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

- PHA main administrative office
- Other (list below)

(3) Search Time

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

If yes, state circumstances below:

- Hospitalization or medical hardship.**
- Hardship due to shortage of family units.**
- Other valid reason.**

(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)

Lived in Washington Park or Lake Ridge Homes after August, 1999, or Dakota Park after January 2002 and who desire to move into HOPE VI sponsored replacement rental housing

A qualified purchaser of a HOPE VI sponsored Homeownership unit

Not currently living in standard, affordable housing

Absence of a Proscribed Crime Preference (see ACOP glossary)

Absence of Misdemeanors

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

Date and Time

Former Federal preferences

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

Other preferences (select all that apply)

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

Other preference(s) (list below)

1. Lived in Washington Park or Lake Ridge Homes after August, 1999, or Dakota Park after January 2002 and who desire to move into HOPE VI sponsored replacement rental housing

1. A qualified purchaser of a HOPE VI sponsored Homeownership unit

2. Not currently living in standard, affordable housing

3. Absence of a Proscribed Crime Preference (see ACOP glossary)

4. Absence of Misdemeanors

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

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

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

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

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

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

(5) Special Purpose Section 8 Assistance Programs

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

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

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

- Through published notices
 Other (list below)

Through Partner Agency: State Department of Children & Families, the One-Stop Shop and also their sub-contractor.

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

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

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

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

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

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

For the earned income of a previously unemployed household member

For increases in earned income

Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

Fixed percentage (other than general rent-setting policy)

If yes, state percentage/s and circumstances below:

For household heads

For other family members

For transportation expenses

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

Other (describe below)

e. Ceiling rents

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

Yes for all developments

Yes but only for some developments

No

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

For all developments

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

For specified general occupancy developments

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

For certain size units; e.g., larger bedroom sizes

Other (list below)

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

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

f. Rent re-determinations:

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

- Never
- At family option
- Any time the family experiences an income increase - **The rent only changes if the increase is at least \$250 a month.**
- 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

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

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

B. Section 8 Tenant-Based Assistance

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

(1) Payment Standards

Describe the voucher payment standards and policies.

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

- At or above 90% but below 100% of FMR
- 100% of FMR
- Above 100% but at or below 110% of FMR
- Above 110% of FMR (if HUD approved; describe circumstances below)
- b. If the payment standard is lower than FMR, why has the PHA selected this standard? (select all that apply)
- FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area
- The PHA has chosen to serve additional families by lowering the payment standard
- Reflects market or submarket
- Other (list below)
- c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply)
- FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area
- Reflects market or submarket
- To increase housing options for families
- Other (list below)
- d. How often are payment standards reevaluated for adequacy? (select one)
- Annually
- Other (list below)
- e. What factors will the PHA consider in its assessment of the adequacy of its payment standard? (select all that apply)
- Success rates of assisted families
- Rent burdens of assisted families
- Other (list below)

(2) Minimum Rent

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

5. Operations and Management:

[24 CFR Part 903.7 9 (e)]

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

A. PHA Management Structure

Describe the PHA's management structure and organization.

(select one)

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

B. HUD Programs Under PHA Management

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

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	453	88
Section 8 Vouchers	745	125
Section 8 Certificates		
Section 8 Mod Rehab		
Welfare to Work		
Family Unification	473	91
Disabled	25	2
HOPE VI	343	0
ROSS	324	24

C. Management and Maintenance Policies

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

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

- Admissions and Continued Occupancy Policy**
- Human Resource Policy**
- Investment Policy**
- Public Presentations During Commission Meetings**
- Procurement Policy**
- Grievance Policy**
- Parking Policy**
- Trash Disposal Policy**
- Records Retention Policy**
- Safety Policy**
- Dakota Park Management Plan**
- Washington Ridge Management Plan**

(2) Section 8 Management: (list below)
Administrative Plan

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

Exemptions from component 6: High performing PHAs are not required to complete component 6. Section 8-Only PHAs are exempt from sub-component 6A.

A. Public Housing

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

If yes, list additions to federal requirements below:

2. Which PHA office should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)

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

B. Section 8 Tenant-Based Assistance

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

If yes, list additions to federal requirements below:

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

- PHA main administrative office
 Other (list below)

7. Capital Improvement Needs

[24 CFR Part 903.7 9 (g)]

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

A. Capital Fund Activities

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

(1) Capital Fund Program Annual Statement

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

Select one:

The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment B

-or-

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

(2) Optional 5-Year Action Plan

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

a. Yes No: Is the PHA providing an optional 5-Year Action Plan for the Capital Fund? (if no, skip to sub-component 7B)

b. If yes to question a, select one:

The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment C

-or-

The Capital Fund Program 5-Year Action Plan is provided below: (if selected, copy the CFP optional 5-Year Action Plan from the Table Library and insert here)

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

Applicability of sub-component 7B: All PHAs administering public housing. Identify any approved HOPE VI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

Yes No: a) Has the PHA received a HOPE VI revitalization grant? (if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary)

b) Status of HOPE VI revitalization grant (complete one set of questions for each grant)

1. Development name: **Washington Ridge**

2. Development (project) number: **FL011-001, FL011-003, and FL011-005**

3. Status of grant: (select the statement that best describes the current status)

Revitalization Plan under development

Revitalization Plan submitted, pending approval

Revitalization Plan approved

Activities pursuant to an approved Revitalization Plan underway

Yes No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year? If yes, list development name/s below:

Yes No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year? If yes, list developments or activities below: **Washington Ridge Rentals and Greater Lakeland (see Revitalization Plan).**

Yes No: e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?

If yes, list developments or activities below:

Acquiring lots and in-fill development in the Paul A. Diggs neighborhood pursuant to HOPE VI Implementation; Begin acquisition/new development of units in Greater Lakeland area pursuant to HOPE VI Implementation; Rehabilitation, and homeownership units at Magnolia Pointe (formerly Lakeview Gardens).

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

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

1. Yes No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 of the U.S. Housing Act of 1937 (42 U.S.C. 1437p)) in the plan Fiscal Year? (If “No”, skip to component 9; if “yes”, complete one activity description for each development.)

2. Activity Description

Yes No: Has the PHA provided the activities description information in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 9. If “No”, complete the Activity Description table below.)

Demolition/Disposition Activity Description
1a. Development name: Washington Ridge
1b. Development (project) number: FL011- 01 and 03
2. Activity type: Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one) Approved <input checked="" type="checkbox"/> for 55 homeownership lots Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/> (for commercial development)
4. Date application approved, submitted, or planned for submission: 10/03 and later in 06
5. Number of units affected:
6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 12/31/03

b. Projected end date of activity: 12/31/06

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

[24 CFR Part 903.7 9 (i)]

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

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

2. Activity Description

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

Designation of Public Housing Activity Description	
1a. Development name: Cecil Gober	
1b. Development (project) number: FL-011-006	
2. Designation type:	
Occupancy by only the elderly	
Occupancy by families with disabilities	<input type="checkbox"/>
Occupancy by only elderly families and families with disabilities	<input checked="" type="checkbox"/>
3. Application status (select one)	
Approved; included in the PHA's Designation Plan	<input type="checkbox"/>
Submitted, pending approval	<input checked="" type="checkbox"/>
Planned application	<input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: xxxxx	
5. If approved, will this designation constitute a	
<input type="checkbox"/> New Designation Plan	
<input checked="" type="checkbox"/> Revision of a previously approved Designation Plan?	
6. Number of units affected: 33 elderly and 4 disabled	
7. Coverage of action (select one)	
<input type="checkbox"/> Part of the development	
<input checked="" type="checkbox"/> Total development	

Designation of Public Housing Activity Description	
1a. Development name: The Manor	
1b. Development (project) number: FL-011-015 (Mid-rise portion –78 units)	
2. Designation type:	Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one)	Approved; included in the PHA's Designation Plan <input type="checkbox"/> Submitted, pending approval <input checked="" type="checkbox"/> Planned application
4. Date this designation approved, submitted, or planned for submission: xxxxxx	
5. If approved, will this designation constitute a	<input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously approved Designation Plan?
7. Number of units affected: 30	
7. Coverage of action (select one)	<input type="checkbox"/> <input checked="" type="checkbox"/> Part of the development Total development

Designation of Public Housing Activity Description	
1a. Development name: Washington Oaks	
1b. Development (project) number: FL-011-015 (duplex portion – 30 units)	
2. Designation type:	Occupancy by only the elderly <input type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input checked="" type="checkbox"/>
3. Application status (select one)	Approved; included in the PHA's Designation Plan <input type="checkbox"/> Submitted, pending approval <input checked="" type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission xxxxx	
5. If approved, will this designation constitute a	<input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously approved Designation Plan?
8. Number of units affected: 12	
7. Coverage of action (select one)	<input checked="" type="checkbox"/> Part of the development Total development

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

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

A. Assessments of Reasonable Revitalization Pursuant to section 202 of the HUD FY 1996 HUD Appropriations Act

1. Yes No: Have any of the PHA's developments or portions of developments been identified by HUD or the PHA as covered under section 202 of the HUD FY 1996 HUD Appropriations Act? (If "No", skip to component 11; if "yes", complete one activity description for each identified development, unless eligible to complete a streamlined submission. PHAs completing streamlined submissions may skip to component 11.)

2. Activity Description

- Yes No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If "yes", skip to component 11. If "No", complete the Activity Description table below.

Conversion of Public Housing Activity Description	
1a. Development name:	
1b. Development (project) number:	
2. What is the status of the required assessment?	
<input type="checkbox"/> Assessment underway <input type="checkbox"/> Assessment results submitted to HUD <input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question) <input type="checkbox"/> Other (explain below)	
3. <input type="checkbox"/> Yes <input type="checkbox"/> No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to block 5.)	
4. Status of Conversion Plan (select the statement that best describes the current status)	
<input type="checkbox"/> Conversion Plan in development <input type="checkbox"/> Conversion Plan submitted to HUD on: (DD/MM/YYYY) <input type="checkbox"/> Conversion Plan approved by HUD on: (DD/MM/YYYY) <input type="checkbox"/> Activities pursuant to HUD-approved Conversion Plan underway	
5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one)	
<input type="checkbox"/> Units addressed in a pending or approved demolition application (date submitted or approved:) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved:) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved:)	

- Requirements no longer applicable: vacancy rates are less than 10 percent
- Requirements no longer applicable: site now has less than 300 units
- Other: (describe below)

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

C. Reserved for Conversions pursuant to Section 33 of the U.S. Housing Act of 1937

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

Exemptions from Component 11A: Section 8 only PHAs are not required to complete 11A.

1. Yes No: Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under section 5(h), the HOPE I program, or section 32 of the U.S. Housing Act of 1937 (42 U.S.C. 1437z-4). (If “No”, skip to component 11B; if “yes”, complete one activity description for each applicable program/plan, unless eligible to complete a streamlined submission due to **small PHA** or **high performing PHA** status. PHAs completing streamlined submissions may skip to component 11B.)

2. Activity Description
 Yes No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 12. If “No”, complete the Activity Description table below.)

Public Housing Homeownership Activity Description (Complete one for each development affected)	
1a. Development name: Magnolia Pointe	
1b. Development (project) number: FL-011-005	
2. Federal Program authority:	
<input type="checkbox"/> HOPE I <input checked="" type="checkbox"/> 5(h) <input type="checkbox"/> Turnkey III <input type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)	
3. Application status: (select one)	
<input checked="" type="checkbox"/> Approved; included in the PHA’s Homeownership Plan/Program <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application	
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: (01/08/2002)	
5. Number of units affected: 44	

6. Coverage of action: (select one)

- Part of the development
 Total development

B. Section 8 Tenant Based Assistance

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

2. Program Description:

a. Size of Program

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

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

- 25 or fewer participants
 26 - 50 participants
 51 to 100 participants
 more than 100 participants

b. PHA established eligibility criteria

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

If yes, list criteria below:

12. PHA Community Service and Self-sufficiency Programs:

[24 CFR Part 903.7 9 (1)]

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

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

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

If yes, what was the date that agreement was signed? 27/04/99

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

- Client referrals
 Information sharing regarding mutual clients (for rent determinations and otherwise)

- Coordinate the provision of specific social and self-sufficiency services and programs to eligible families
- Jointly administer programs
- Partner to administer a HUD Welfare-to-Work voucher program
- Joint administration of other demonstration program
- Other (describe)

B. Services and programs offered to residents and participants

(1) General

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

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

b. Economic and Social self-sufficiency programs

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

Services and Programs					
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)	
FSS	129	Self Selected	Main Office	Both	
HOPE VI CSS	343	Residence	West Lake Office	Public Housing	

(2) Family Self Sufficiency program/s

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2003 Estimate)	Actual Number of Participants (As of: 06/22/2004)
Public Housing	0	29
Section 8	65	88

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

C. Welfare Benefit Reductions

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)

- Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies
- Informing residents of new policy on admission and reexamination
- Actively notifying residents of new policy at times in addition to admission and reexamination.
- Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
- Establishing a protocol for exchange of information with all appropriate TANF agencies
- Other: (list below)

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

13. PHA Safety and Crime Prevention Measures:

[24 CFR Part 903.7 9 (m)]

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

A. Need for measures to ensure the safety of public housing residents

1. Describe the need for measures to ensure the safety of public housing residents (select all that apply)

- High incidence of violent and/or drug-related crime in some or all of the PHA's developments

- High incidence of violent and/or drug-related crime in the areas surrounding or adjacent to the PHA's developments
- Residents fearful for their safety and/or the safety of their children
- Observed lower-level crime, vandalism and/or graffiti
- People on waiting list unwilling to move into one or more developments due to perceived and/or actual levels of violent and/or drug-related crime
- Other (describe below)

2. What information or data did the PHA use to determine the need for PHA actions to improve safety of residents (select all that apply).

- Safety and security survey of residents
- Analysis of crime statistics over time for crimes committed "in and around" public housing authority
- Analysis of cost trends over time for repair of vandalism and removal of graffiti
- Resident reports
- PHA employee reports
- Police reports
- Demonstrable, quantifiable success with previous or ongoing anticrime/anti drug programs
- Other (describe below)

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

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

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

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

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

C. Coordination between PHA and the police

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

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

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

D. Additional information as required by PHDEP/PHDEP Plan

PHAs eligible for FY 2004PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

- Yes No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes No: Has the PHA included the PHDEP Plan for FY 2003 in this PHA Plan?
- Yes No: This PHDEP Plan is an Attachment. (Attachment Filename: ____)

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

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

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

1. Yes No: Is the PHA required to have an audit conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h))?
(If no, skip to component 17.)
2. Yes No: Was the most recent fiscal audit submitted to HUD?
3. Yes No: Were there any findings as the result of that audit?
4. Yes No: If there were any findings, do any remain unresolved?
If yes, how many unresolved findings remain?
5. Yes No: Have responses to any unresolved findings been submitted to HUD?
If not, when are they due (state below)?

17. PHA Asset Management:

[24 CFR Part 903.7 9 (q)]

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

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

Comprehensive stock assessment

Other: (list below)

3. Yes No: Has the PHA included descriptions of asset management activities in the **optional** Public Housing Asset Management Table?

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

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

2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)

Attached at Attachment Q

Provided below:

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

Considered comments, but determined that no changes to the PHA Plan were necessary.

The PHA changed portions of the PHA Plan in response to comments

List changes below:

Other: (list below) See Attachment

B. Description of Election process for Residents on the PHA Board

1. Yes No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)

2. Yes No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)

3. Description of Resident Election Process

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

Candidates were nominated by resident and assisted family organizations

Candidates could be nominated by any adult recipient of PHA assistance

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

Other: (describe):

b. Eligible candidates: (select one)

Any recipient of PHA assistance

Any head of household receiving PHA assistance

Any adult recipient of PHA assistance

Any adult member of a resident or assisted family organization

Other (list)

c. Eligible voters: (select all that apply):

All adult recipients of PHA assistance (public housing and section 8 tenant-based assistance)

Representatives of all PHA resident and assisted family organizations

Other (list)

C. Statement of Consistency with the Consolidated Plan

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

1. Consolidated Plan jurisdiction: (provide name here): **City of Lakeland, Florida and Polk County, Florida**

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

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

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

The City of Lakeland is as supportive as possible in their Consolidated Plan. They are particularly strong with HOPE VI, supportive services, and homeownership areas. They refund our PILOT payments. However, we do not anticipate any CDBG funding for the next fiscal year.

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

As can be seen by the above, the City of Lakeland has been very generous in cooperating with the LHA. Polk County has not traditionally gotten involved with LHA, because most of LHA's properties are located within the corporate city limits of Lakeland.

D. Other Information Required by HUD

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

Attachments

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

Attachment A: Deconcentration

10.4 DECONCENTRATION POLICY

It is the Lakeland Housing Authority's policy to provide for deconcentration of poverty and encourage income mixing by bringing higher income families into lower income developments and lower income families into higher income developments. Toward this end, we will skip families on the waiting list to reach other families with a lower or higher income. We will accomplish this in a uniform and non-discriminating manner.

The Lakeland Housing Authority will affirmatively market our housing to all eligible income groups. Lower income residents will not be steered toward lower income developments and higher income people will not be steered toward higher income developments.

Prior to the beginning of each fiscal year, we will analyze the income levels of families residing in each of our developments and the income levels of the families on the waiting list. Based on this analysis, we will determine the level of marketing strategies and deconcentration incentives to implement.

10.5 DECONCENTRATION INCENTIVES

The Lakeland Housing Authority may offer one or more incentives to encourage applicant families whose income classification would help to meet the deconcentration goals of a particular development.

Various incentives may be used at different times, or under different conditions, but will always be provided in a consistent and nondiscriminatory manner.

Attachment B

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14P011501-06 Replacement Housing Factor Grant No:			Federal FY of Grant: 2006
<input checked="" 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 No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds	0			
2	1406 Operations	61,500			
3	1408 Management Improvements	5,000			
4	1410 Administration	61,500			
5	1411 Audit	0			
6	1415 Liquidated Damages	0			
7	1430 Fees and Costs	16,000			
8	1440 Site Acquisition	0			
9	1450 Site Improvement	21,000			
10	1460 Dwelling Structures	402,000			
11	1465.1 Dwelling Equipment— Nonexpendable	2,000			
12	1470 Nondwelling Structures	1,000			
13	1475 Nondwelling Equipment	10,000			
14	1485 Demolition	0			
15	1490 Replacement Reserve	0			
16	1492 Moving to Work Demonstration	0			
17	1495.1 Relocation Costs	500			
18	1499 Development Activities	1,000			
19	1501 Collaterization or Debt Service	0			

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

PHA Name: Lakeland Housing Authority	Grant Type and Number Capital Fund Program Grant No: FL14P011501-06 Replacement Housing Factor Grant No:	Federal FY of Grant: 2006
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Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending: Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
20	1502 Contingency	37,030			
21	Amount of Annual Grant: (sum of lines 2 – 20)	618,530			
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				

Annual Statement/Performance and Evaluation Report

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

Part II: Supporting Pages

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14P011501-06 Replacement Housing Factor Grant No:			Federal FY of Grant: 2006			
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	
1406	Operations							
PHA-Wide	- Operating Subsidy	1406	>20%	61,500				
	Total 1406			61,500				
1408	Management Improvements							
PHA-Wide	- Develop & Update Agency Plan	1408	Lump Sum	3,000				
	- Vacancy Reduction	1408	Lump Sum	400				
	- Develop Resident Initiatives	1408	Lump Sum	400				
	- Computer Software	1408	Lump Sum	400				
	- Grant Writing	1408	Lump Sum	400				
	- Security Camera System	1408	Lump Sum	400				
	Total 1408			5,000				
1410	Administration							
PHA-Wide	- Facilities Director-25%, Maintenance Sup-50%, Operations Support Assoc- 50%, Purchasing Agent-35%	1410	Lump Sum	30,000				
	- Employee Benefits	1410	Lump Sum	11,000				
	- Proration of Admin Support	1410	Lump Sum	20,500				
	Total 1410			61,500				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14P011501-06 Replacement Housing Factor Grant No:			Federal FY of Grant: 2006			
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	
1430	Fees & Costs							
PHA-Wide	- Clerk-of-the-Works Salary-50% (15 hours per week)	1430	Lump Sum	6,300				
	- Security Camera Maintenance Contract	1430	Lump Sum	500				
	- A&E Fees	1430	Lump Sum	7,300				
	-Sundry Planning and In-House Design	1430	Lump Sum	1,900				
	Total 1430			16,000				
1450	Site Improvements							
PHA-Wide	- Tree Trimming	1450	Lump Sum	5,150				
	- Sidewalk Repairs	1450	Lump Sum	500				
	- Erosion Control	1450	Lump Sum	500				
	- Fencing	1450	Lump Sum	1,300				
	- Reseal/Paving Repair	1450	Lump Sum	1,200				
	- Drainage Repair/Gutters	1450	Lump Sum	1,200				
	- Landscaping	1450	Lump Sum	5,150				
	- Signage	1450	Lump Sum	900				
	- Add Parking Central	1450	Lump Sum	0				
	- Misc. Repairs - PHAS		Lump Sum	550				
FL11-4 Westlake Addition	- Playground Equipment/Basketball Court	1450	Lump Sum	900				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14P011501-06 Replacement Housing Factor Grant No:			Federal FY of Grant: 2006			
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	
FL11-5 Lakeview Gardens	Site Improvements	1450	Lump Sum	0				
FL11-6 Cecil Gober & John Wright	-Playground Improvements (forced account labor)	1450	Lump Sum	2,050				
	-Water Line Replacement & Individual Meters (forced account labor)	1450	Lump Sum	550				
FL11-7 Paul Colton & Bonnet Shores	-Water Line Replacement & Individual Meters (forced account labor)	1450	Lump Sum	500				
	-Playground Improvements (forced account labor)	1450	Lump Sum	550				
	Total 1450			21,000				
1460	Dwelling Structures							
PHA-Wide	- Exterior Painting	1460	Lump Sum	500				
	- Pressure Washing	1460	Lump Sum	500				
	- Exterior/Screen Doors	1460	Lump Sum	500				
	- Security Window Screens	1460	Lump Sum	500				
	- Exterior Masonry Repairs	1460	Lump Sum	500				
	- Soffet, Fascia, & Gable Repairs	1460	Lump Sum	500				
	- Fire Suppression System	1460	Lump Sum	500				
	- Misc. Repairs PHAS	1460	Lump Sum	500				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14P011501-06 Replacement Housing Factor Grant No:			Federal FY of Grant: 2006			
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	
FL11-2 Westlake	- Comprehensive Modernization to include: Exterior Paint, Mildew Control, Central HVAC, Dryer/Vent/Wiring, Range Vent Hoods	1460	Lump Sum	500				
FL11-4 Westlake Add	-Exterior Paint	1460	Lump Sum	500				
FL11-6 Cecil Gober & John Wright	-Comprehensive Modernization to include: Utility Doors, Exterior Windows, Kitchen & Bath Modernization, VCT Flooring Replacement, Water Supply Line Replacement, Emergency Call System, Dryer Vents, Central HVAC, Interior & Exterior Doors and Attic Insulation, Repair Termite Damage, Drywall Replacement, HW Heater Replacement, & Upgrade Electric Service (replace aluminum wire & devices) (forced account labor)	1460	Lump Sum	500				

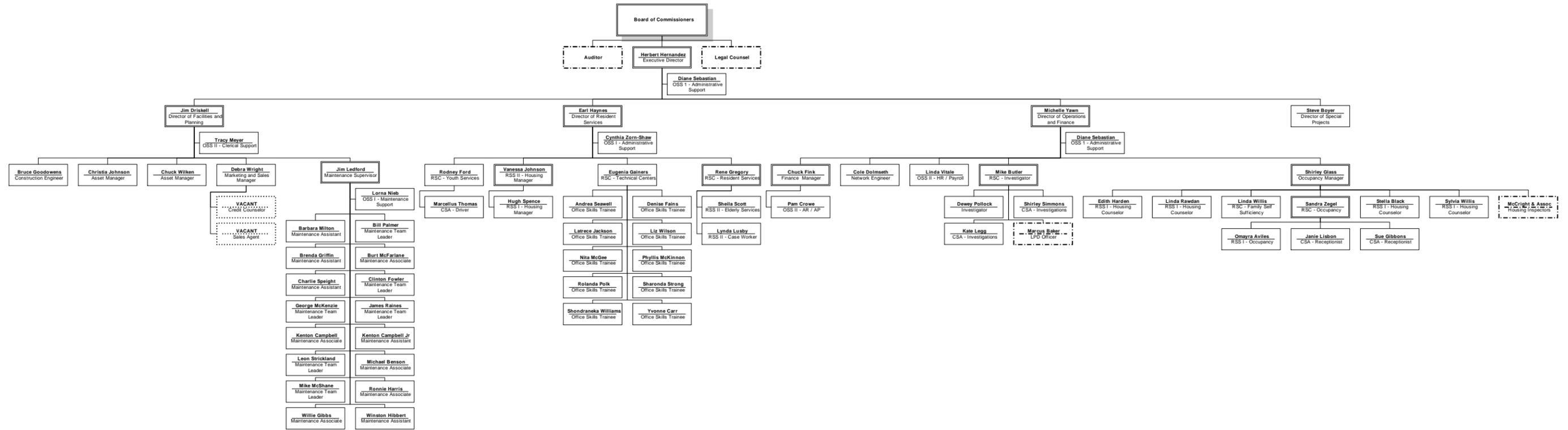
Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages

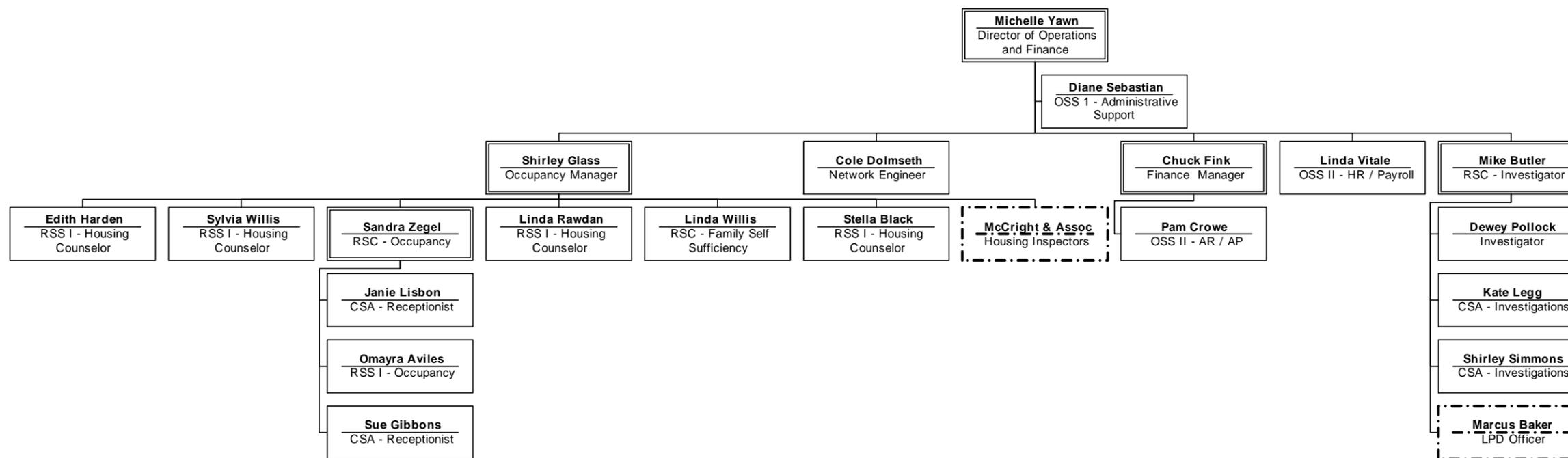
PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14P011501-06 Replacement Housing Factor Grant No:			Federal FY of Grant: 2006			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-7 Paul Colton & Bonnet Shores	-Comprehensive Modernization to include: Utility Doors, Exterior Windows, Kitchen & Bath Modernization, VCT Flooring Replacement, Water Supply Line Replacement, Emergency Call System, Dryer Vents, Central HVAC, Attic Insulation, Gutters & Downspouts, Interior & Exterior Doors, Repair Termite Damage, Drywall Replacement, HW Heater Replacement, & Upgrade Electric Service (replace aluminum wire & devices) (forced account labor)	1460	Lump Sum	396,500				
	Total 1460			402,000				
1465.1	Dwelling Equipment							
PHA-Wide	- Appliance Replacement	1465.1	Lump Sum	2,000				
	Total 1465.1			2,000				
1470	Non-Dwelling Structures							
PHA-Wide	- Renovation of Community Buildings	1470	Lump Sum	1,000				
	Total 1470			1,000				

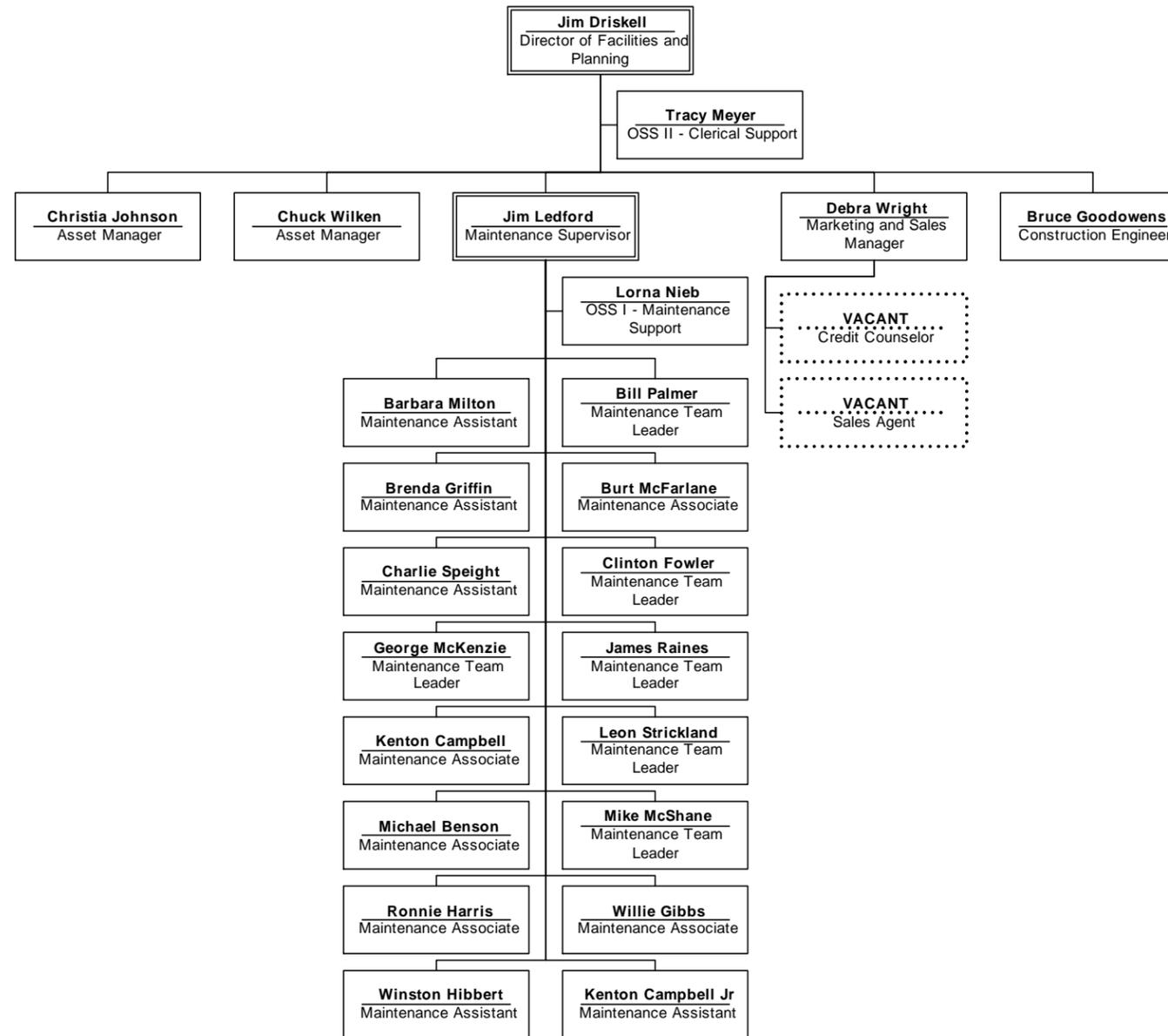
Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages

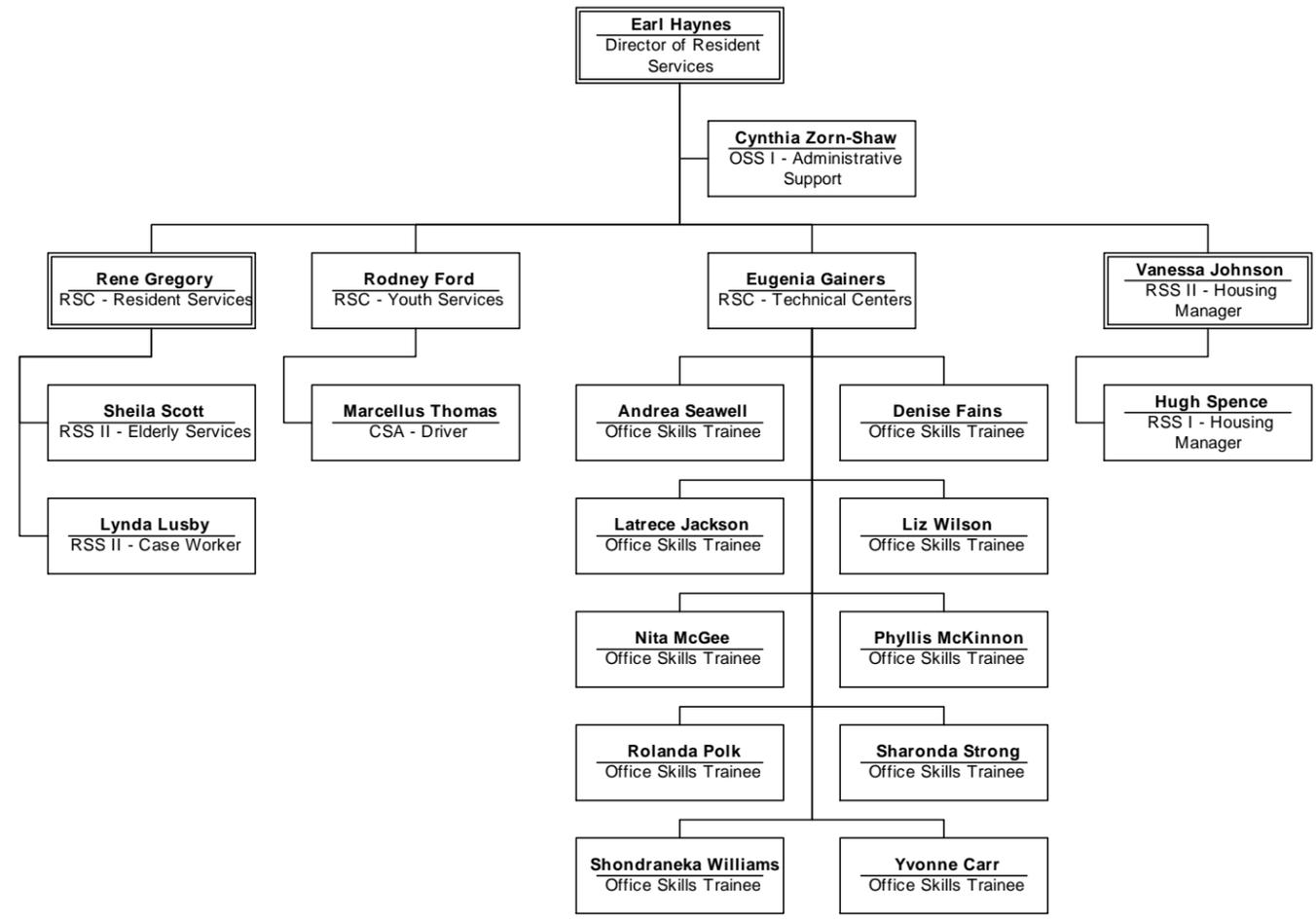
PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14P011501-06 Replacement Housing Factor Grant No:			Federal FY of Grant: 2006			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
1475	Non-Dwelling Equipment							
PHA-Wide	- Replace Office Furniture & Equipment	1475	Lump Sum	500				
	- Common Area Furniture & Fixtures	1475	Lump Sum	500				
	- Purchase Maintenance Vehicles	1475	Lump Sum	4,000				
	- Replacement Equipment including: Handtruck, Floor Buffers, Wet Vacs, Spray Paint Equipment, Chainsaws, Backpack Sprayers, HVAC Recovery Equipment, and Drywall Spray Texture Machine	1475	Lump Sum	4,000				
	- Replacement Mower	1475	Lump Sum	500				
	- Replacement Dump Trailer	1475	Lump Sum	500				
	Total 1475			10,000				
1495.1	Relocation Costs							
	- Relocation	1495.1	Lump Sum	500				
	Total 1495.1			500				
1498	Mod Used for Development							
	- Development	1498	Lump Sum	1,000				
	Total 1498			1,000				

ATTACHMENT C









Attachment D

Capital Fund Program Five-Year Action Plan					
Part I: Summary					
PHA Name Lakeland Housing Authority					<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2	Work Statement for Year 3	Work Statement for Year 4	Work Statement for Year 5
		FFY Grant: 2007 PHA FY: 2007	FFY Grant: 2008 PHA FY: 2008	FFY Grant: 2009 PHA FY: 2009	FFY Grant: 2010 PHA FY: 2010
	Annual Statement				
PHA-Wide		263,481	260,581	317,637	314,570
FL11-2 Westlake		500	500	500	500
FL11-4 Westlake Addition		1,600	1,550	1,800	1,800
FL11-6 John Wright & Cecil Gober		3,650	3,570	4,300	4,235
FL11-7 Paul Colton & Bonnet Shores		486,750	482,220	590,500	584,485
CFP Funds Listed for 5-year planning		755,981	748,421	914,737	905,590
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>2</u> FFY Grant: PHA FY:			Activities for Year: <u>3</u> FFY Grant: PHA FY:		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	PHA-Wide	Operations	75,000	PHA-Wide	Operations	74,500
Annual		Management Improvements	5,000		Management Improvements	5,000
Statement		Administration	75,000		Administration	74,500
		Fees & Costs	16,000		Fees & Costs	16,000
		Site Improvements	20,000		Site Improvements	19,660
		Dwelling Structures	4,000		Dwelling Structures	4,000
		Dwelling Equipment	2,000		Dwelling Equipment	2,000
		Non-Dwelling Structures	1,000		Non-Dwelling Structures	1,000
		Non-Dwelling Equipment	10,000		Non-Dwelling Equipment	10,000
		Relocation	500		Relocation	500
		Mod Used for Development	1,000		Mod Used for Development	1,000
		Contingency	53,981		Contingency	52,421
	FL11-2 Westlake	Dwelling Structures	500	FL11-2 Westlake	Dwelling Structures	500

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year : <u>2</u> FFY Grant: PHA FY:			Activities for Year: <u>3</u> FFY Grant: PHA FY:		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
	FL11-4 Westlake Addition	Site Improvements	1,100	FL11-4 Westlake Addition	Site Improvements	1,050
		Dwelling Structures	500		Dwelling Structures	500
	FL11-6 John Wright & Cecil Gober	Site Improvements	3,150	FL11-6 John Wright & Cecil Gober	Site Improvements	3,070
		Dwelling Structures (Comprehensive Modernization)	500		Dwelling Structures (Comprehensive Modernization)	500
	FL11-7 Paul Colton & Bonnet Shores	Site Improvements	1,250	FL11-7 Paul Colton & Bonnet Shores	Site Improvements	1,220
		Dwelling Structures (Comprehensive Modernization)	485,500		Dwelling Structures (Comprehensive Modernization)	481,000

Capital Fund Program Five-Year Action Plan						
Part II: Supporting Pages—Work Activities						
Activities for Year 1	Activities for Year : <u>2</u> FFY Grant: PHA FY:			Activities for Year: <u>3</u> FFY Grant: PHA FY:		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
Total CFP Estimated Cost			755,981			748,421

Capital Fund Program Five-Year Action Plan					
Part II: Supporting Pages—Work Activities					
Activities for Year : <u>4</u> FFY Grant: PHA FY:			Activities for Year: <u>5</u> FFY Grant: PHA FY:		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
PHA-Wide	Operations	91,000	PHA-Wide	Operations	90,500
	Management Improvements	5,000		Management Improvements	5,000
	Administration	91,000		Administration	90,500
	Fees & Costs	16,000		Fees & Costs	16,000
	Site Improvements	24,400		Site Improvements	23,980
	Dwelling Structures	4,000		Dwelling Structures	4,000
	Dwelling Equipment	2,000		Dwelling Equipment	2,000
	Non-Dwelling Structures	1,000		Non-Dwelling Structures	1,000
	Non-Dwelling Equipment	10,000		Non-Dwelling Equipment	10,000

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

Activities for Year : <u>4</u>			Activities for Year: <u>5</u>		
FFY Grant:			FFY Grant:		
PHA FY:			PHA FY:		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
	Relocation	500		Relocation	500
	Mod Used for Development	1,000		Mod Used for Development	1,000
	Contingency	71,737		Contingency	70,090
FL11-2 Westlake	Dwelling Structures	500	FL11-2 Westlake	Dwelling Structures	500
FL11-4 Westlake Addition	Site Improvements	1,300	FL11-4 Westlake Addition	Site Improvements	1,300
	Dwelling Structures	500		Dwelling Structures	500
FL11-6 John Wright & Cecil Gober	Site Improvements	3,800	FL11-6 John Wright & Cecil Gober	Site Improvements	3,735
	Dwelling Structures (Comprehensive Modernization)	500		Dwelling Structures (Comprehensive Modernization)	500
FL11-7 Paul Colton & Bonnet Shores	Site Improvements	1,500	FL11-7 Paul Colton & Bonnet Shores	Site Improvements	1,485

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

Activities for Year : <u>4</u> FFY Grant: PHA FY:			Activities for Year: <u>5</u> FFY Grant: PHA FY:		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
	Dwelling Structures (Comprehensive Modernization)	589,000		Dwelling Structures (Comprehensive Modernization)	583,000
Total CFP Estimated Cost		914,737			905,590

Attachment E

Definition

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

Required Attachment _F_: Resident Member on the PHA Governing Board

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

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

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

- Elected
- Appointed

C. The term of appointment is (include the date term expires): **May, 2009**

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

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

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

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

Required Attachment G : 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.)

Lilly Brown, Interim President
Tonda Jiles, Secretary
Nita McGee, Treasurer
Victoria Young Smith, Sergeant of Arms

Attachment H
Lakeland Housing Authority 2005 Strategic Goals and Objectives

Goal #1: Having become a high performing housing authority in both the Public Housing and Section 8 programs, LHA shall sustain it.

Objective #1: Improve the accuracy of rent calculation and the sufficiency of the documentation in tenant files in both public housing and Section 8 so that quality control indicates an accuracy rate in excess of HUD program high performance standards by December 31, 2006 and sustain it thereafter. EH, SG 100% Complete

Objective #2: Maintain a Section 8 lease-up rate of at least 98%. SG, CF 100% Complete

Objective #3: Continue and improve task tracking / management by objectives which incorporates appropriate elements of PHAS, SEMAP, CSS Workplan and similar existing measures. DS, CD, SZ 50% complete, will complete by the end of 2005.

Goal #2: Continue to improve our public image through enhanced communication, coordination, and accountability with outside entities, among the staff and with residents.

Objective #1: Continue to meet monthly with the Resident Advisory Board and other residents in a variety of forums to provide the opportunity for input and feedback about agency operations. HH, EH LHA staff have renewed their commitment related to monthly meetings with the RAB and other residents. Additionally, Executive Director will meet every two months with RAB.

Objective #2: Generate at least 8 positive media stories a year. SB, HH 100% complete

Objective #3: Deliver at least 24 talks to groups a year about the activities of LHA, including; but not limited to, governmental, private sector, public sector, civic, religious, women, and minority organizations. SB, HH 100% complete

Goal #3: Be the premier innovative and effective affordable housing provider in Florida.

Objective #1: Utilize LHA's role as the HOPE VI developer to implement the remaining phases by end of the HOPE VI grant period. JD, DW Ongoing, HUD approved amended revitalization plan, pending, 09% LIHTC award notification.

Objective #2: Develop staff and organizational capability so that LHA or an affiliate is prepared to manage its third-party owned rental properties by December 31, 2005. JD, EH, MY, SB Incomplete and under reconsideration.

Objective #3: Maintain eligibility to apply for additional housing choice vouchers as they become available. SG, MY 100% complete

Objective #4: Partner with the Lakeland Polk Housing Corporation and other housing providers to increase the availability of affordable housing in its jurisdiction by 500 units by December 31, 2009. HH, JD Ongoing

Objective #5: Assist at least 20 families into homeownership through the Section 8 Homeownership Program by December 31, 2009. JD, MY Ongoing

Objective #6: Expand the LHA business plan to include non-traditional entrepreneurial methods and practices that positively impact affordable housing in LHA's jurisdiction. HH, JD Ongoing

Goal #4: Implement income generating and cost saving measures while increasing operational efficiency in order to reduce LHA's dependency on HUD funding.

Objective #1: Complete implementation of the Energy and Water Cost savings programs by December 31, 2007. JD, JL, BG Under review by staff and consultants

Objective #2: By December 31, 2006 begin marketing LHA staffing assets to others. JD, HH Ongoing

Objective #3: Develop and implement a plan to obtain \$50 million of grant or leveraged funds by December 31, 2009 and ensure compliance with all grant agreements. SB, HH Completed and ongoing.

Objective #4: Maximize the HUD funding systems (including the Tenant Integrity Program) to better fund LHA without unduly burdening the residents. Ongoing

Goal #5: Increase and encourage the self-sufficiency efforts of all residents.

Objective # 1: Assist children who reside in LHA properties to attain academic success as measured by increases in FCAT scores so that the percentage passing the FCAT equals or exceeds the Polk County average. RF, EG Data is being gathered to measure this objective.

Objective #2: Increase the number of children using LHA educational and computer literacy programs by 20% by December 31, 2009. RF, EG Data is being gathered to measure this objective.

Objective #3: Adult residents will be afforded the opportunity to increase their literacy skills and to continue their adult educational goals through the use of Technical Learning Centers so that at least an additional 20% have either a high school diploma or GED by December 31, 2009. EG Data is being gathered to measure this objective.

Objective #4: LHA shall assist its non-elderly non-disabled public housing residents increase the LHA average annual household income by 35% by December 31, 2009. EH, RG Data is being gathered to measure this objective.

Objective #5: Increase the number of LHA seniors and people with disabilities using LHA sponsored programs by 20% by December 31, 2009. EH, RG Data is being gathered to measure this objective.

Objective #6: Increase the number of people participating in the LHA Public Housing Family Self-Sufficiency Program to 50 by December 31, 2009. EH, RG Ongoing, enrollment is now 30%.

Goal #6: Improve employee relations and morale.

Objective #1: Improve lines of communications through staff meetings and other necessary internal communications to provide updates and progress reports about agency activities.

HH,SB,MY Complete

Objective #2: Continue to reward performance through the timely implementation of the performance evaluation / merit increase system. All Mgmt. Staff Complete, timeliness has room for improvement.

Objective #3: Encourage and support staff partaking in continuing education opportunities to the greatest degree possible within funding constraints All Mgmt. Staff. Complete

Attachment I

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 1) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 06-30-2005 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	\$239,000	\$144,087	\$144,087	\$144,087
3	1408 Management Improvements	\$11,000	\$11,000	\$6,453	\$6,453
4	1410 Administration	\$120,000	\$120,000	\$120,000	\$120,000
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$40,000	\$40,000	\$24,869	\$24,869
8	1440 Site Acquisition				
9	1450 Site Improvement	\$128,000	\$128,000	\$56,549	\$56,549
10	1460 Dwelling Structures	\$510,000	\$510,000	\$399,637	\$399,637
11	1465.1 Dwelling Equipment— Nonexpendable	\$1,000	\$1,000	\$1,000	\$1,000
12	1470 Nondwelling Structures	\$1,000	\$1,000	\$800	\$800
13	1475 Nondwelling Equipment	\$48,800	\$48,800	\$39,979	\$39,979
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	\$1,000	\$1,000		
18	1499 Development Activities	\$5,000	\$5,000		
19	1501 Collaterization or Debt Service				

Annual Statement/Performance and Evaluation Report

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

PHA Name: Lakeland Housing Authority	Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:	Federal FY of Grant: 2003
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no: 1)
 Performance and Evaluation Report for Period Ending: 06-30-2005
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
20	1502 Contingency	\$95,200	0		
21	Amount of Annual Grant: (sum of lines 2 – 20)	\$1,200,000	\$1,009,887	\$793,374	\$793,374
22	Amount of line 21 Related to LBP Activities	0	0		
23	Amount of line 21 Related to Section 504 compliance	0	0		
24	Amount of line 21 Related to Security – Soft Costs	0	0		
25	Amount of Line 21 Related to Security – Hard Costs	0	0		
26	Amount of line 21 Related to Energy Conservation Measures	\$205,000	\$205,000		

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA-Wide	Operations							
	- Operating Subsidy	1406	>20%	\$144,087		\$144,087	\$144,087	
	Total 1406			\$144,087				
PHA-Wide	Management Improvements							
	- Develop & Update Agency Plan	1408	Lump Sum	\$6,000		\$4,000	\$4,000	
	- Vacancy Reduction	1408	Lump Sum	\$1,000				
	- Develop Resident Initiatives	1408	Lump Sum	\$1,000				
	- Computer Software	1408	Lump Sum	\$1,000		\$2,453	\$2,453	
	- Grant Writing	1408	Lump Sum	\$1,000				
	- Security Camera System	1408	Lump Sum	\$1,000				
	Total 1408			\$11,000		\$6,453	\$6,453	
PHA – Wide	Administration							

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	- Facilities Director – 25%, Maintenance Sup 50% Operations Support Assoc. – 50%, Purchasing Agent – 35%	1410	Lump Sum	\$58,000		\$58,000	\$58,000	
	- Employee Benefits	1410	Lump Sum	\$22,000		\$22,000	\$22,000	
	- Proration of Admin Support	1410	Lump Sum	\$40,000		\$40,000	\$40,000	
	Total 1410			\$120,000		\$120,000	\$120,000	
PHA-Wide	Fees and Costs							
	- Clerk-of-the-Works Salary 50% (15 hours per week)	1430	Lump Sum	\$15,500		\$4,369	\$4,369	
	- Security Camera Maintenance Contract	1430	Lump Sum	\$1,000				
	- A/E Fees	1430	Lump Sum	\$19,000		\$19,000	\$19,000	
	- Sundry Planning and In-house Design	1430	Lump Sum	\$4,500		\$1,500	\$1,500	
	Total 1430			\$40,000		\$24,869	\$24,869	
PHA-Wide	Site Improvements							

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	- Tree Trimming	1450	Lump Sum	\$10,000		\$10,000	\$10,000	
	- Sidewalk Repairs	1450	Lump Sum	\$10,000		\$10,000	\$10,000	
	- Erosion Control	1450	Lump Sum	\$6,000		\$6,000	\$6,000	
	- Fencing	1450	Lump Sum	\$5,000				
	- Reseal/Paving Repair	1450	Lump Sum	\$15,000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	

Annual Statement/Performance and Evaluation Report

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

Part II: Supporting Pages

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	- Drainage Repair/Gutters	1450	Lump Sum	\$4,000				
	- Landscaping	1450	Lump Sum	\$15,000		\$3,120	\$3,120	
	- Signage	1450	Lump Sum	\$1,000				
	- Add Parking Central	1450	Lump Sum	\$15,000				
	- Misc Repairs –PHAS	1450	Lump Sum	\$2,000				
FL11-4 Westlake Addition.	- Playground Equipment/ Basketball Court	1450	Lump Sum	\$1,000		\$444	\$444	
FL11-5 Lakeview Gardens	Site improvements	1450	Lump Sum	\$1,000				
		1450	Lump Sum					
FL11-6 Cecil Gober & John Wright	- Playground Improvements (Forced account labor)	1450	Lump Sum	\$1,000				
	- Water Line Replacement and Individual Meters (Forced account labor)	1450	Lump Sum	\$1,000				

Annual Statement/Performance and Evaluation Report

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

Part II: Supporting Pages

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-7 Paul Colton & Bonnet Shores	- Water Line Replacement and Individual Meters (Force account labor)	1450	Lump Sum	\$40,000		\$26,985	\$26,985	
	- Playground Improvements (Force account labor)	1450	Lump Sum	\$1,000				
	Total 1450			\$128,000		\$56,549	\$56,549	
PHA-Wide	Dwelling Structures							
	- Exterior Painting	1460	Lump Sum	\$3,000		\$1,274	\$1,274	
	- Pressure Washing	1460	Lump Sum	\$1,000				
	- Exterior/ Screen Doors	1460	Lump Sum	\$1,000				
	- Security Window Screens	1460	Lump Sum	\$1,000				
	- Exterior Masonry Repairs	1460	Lump Sum	\$1,000				
	- Soffet, Fascia, & Gable Repairs	1460	Lump Sum	\$1,000				
	- Fire Suppression System	1460	Lump Sum	\$20,000				
	- Misc Repairs PHAS	1460	Lump Sum	\$2,000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-2 Westlake	- Comprehensive Modernization to include –Exterior Paint, mildew control, central HVAC, dryer/vent/wiring, and range vent hoods	1460	Lump Sum	\$85,000		\$8,669	\$8,669	
FL11-4 Westlake Add	Exterior Paint	1460	Lump Sum	\$1,000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-6 Cecil Gober & John Wright	- Comprehensive Modernization to include utility doors, exterior windows, kitchen and bath modernization, VCT flooring replacement, water supply line replacement, emergency call system, dryer vents, central HVAC, interior & exterior doors and attic insulation, repair termite damage, drywall replacement, HW heater replacement, upgrade elec service (replace aluminum wire and devices) (Forced account labor)	1460	Lump Sum	\$1,000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-7 Paul Colton & Bonnet Shores	- Comprehensive Modernization to include utility doors, exterior windows, kitchen and bath modernization,VCT flooring replacement, water supply line replacement, emergency call system, dryer vents, central HVAC, attic insulation, gutters and downspouts, and interior & exterior doors, repair termite damage,drywall replacement,HW heater replacement,upgrade elec service (replace aluminum wire and devices) (Forced account labor)	1460	Lump Sum	\$393,000		\$389,694	\$389,694	
	Total 1460			\$510,000		\$399,637	\$399,637	
1465.1 PHA-Wide	Dwelling Equipment - Appliance Replacement	1465.1	Lump Sum	\$1,000		\$1,000	\$1,000	

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	Total 1465.1			\$1,000		\$1,000	\$1,000	
1470	Non-Dwelling Structures							
PHA-Wide	- Renovation of Community Buildings	1470	Lump Sum	\$1,000		\$800	\$800	
	Total 1470			\$1,000		\$800	\$800	
1475	Non-Dwelling Equipment							
PHA-Wide	- Replace Office furniture and equipment	1475	Lump Sum	\$5,000		\$1,908	\$1,908	
	- Common Area furniture and fixtures	1475	Lump Sum	\$1,000				
	Purchase maintenance vehicles	1475	2	\$30,000		\$30,000	\$30,000	

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150103 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	Replacement Equipment including handtruck, floor buffers, wet vacs, spray paint equip., chain saws, backpack sprayers, hvac recovery equip., and drywall spray texture machine)	1475	Lump Sum	\$4,000		\$3,271	\$3,271	
	Replacement mower	1475	Lump Sum	\$4,800		\$4,800	\$4,800	
	Replacement dump trailer	1475	Lump Sum	\$4,000				
	Total 1475			\$48,800		\$8,966	\$8,966	
1495.1	Relocation Costs							
	- Relocation	1495.1	Lump Sum	\$1,000				
	Total 1495.1			\$1,000				
1498	Mod Used for Development							
	- Development	1498	Lump Sum	\$5,000				
	Total 1498			\$5,000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program No: FL29P01150103 Replacement Housing Factor No:					Federal FY of Grant: 2003	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates	
	Original	Revised	Actual	Original	Revised	Actual		
1406	12/04			6/06				
1408	12/04			6/06				
1410	12/04			6/06				
1430	12/04			6/06				
1450	12/04			6/06				
1460	12/04			6/06				
1465.1	12/04			6/06				
1470	12/04			6/06				
1475	12/04			6/06				
1495.1	12/04			6/06				
1499	12/04			6/06				
1502	12/04			6/06				

Attachment J

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Lakeland Housing Authority			Grant Type and Number Capital Fund Program Grant No: FL29P0115204 Replacement Housing Factor Grant No:		Federal FY of Grant: 2004
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no:1) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: 06-30-2005 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	\$60,000		\$60,000	\$60,000
3	1408 Management Improvements	\$5,500		\$4,460	\$4,460
4	1410 Administration	\$60,000		\$60,000	\$60,000
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$18,500		\$2,985	\$2,985
8	1440 Site Acquisition				
9	1450 Site Improvement	\$20,500			
10	1460 Dwelling Structures	\$372,500			
11	1465.1 Dwelling Equipment— Nonexpendable	\$1,000		\$1,000	\$1,000
12	1470 Nondwelling Structures	\$1,000			
13	1475 Nondwelling Equipment	\$4,500			
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	\$500			
18	1499 Development Activities	\$1,000			
19	1501 Collaterization or Debt Service				

Annual Statement/Performance and Evaluation Report

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

PHA Name: Lakeland Housing Authority	Grant Type and Number Capital Fund Program Grant No: FL29P0115204 Replacement Housing Factor Grant No:	Federal FY of Grant: 2004
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no:1)
 Performance and Evaluation Report for Period Ending: 06-30-2005
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
20	1502 Contingency	\$35,540		\$35,540	\$35,540
21	Amount of Annual Grant: (sum of lines 2 – 20)	\$580,540		\$163,985	\$163,985
22	Amount of line 21 Related to LBP Activities	0			
23	Amount of line 21 Related to Section 504 compliance	0			
24	Amount of line 21 Related to Security – Soft Costs	0			
25	Amount of Line 21 Related to Security – Hard Costs	0			
26	Amount of line 21 Related to Energy Conservation 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: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115204 Replacement Housing Factor Grant No:				Federal FY of Grant: 2004		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA-Wide	Operations							
	- Operating Subsidy	1406	>20%	60,000		60,000	60,000	
	Total 1406			60,000		60,000	60,000	
PHA-Wide	Management Improvements							
	- Develop & Update Agency Plan	1408	Lump Sum	3,000		2,960	2,960	
	- Vacancy Reduction	1408	Lump Sum	500		500	500	
	- Develop Resident Initiatives	1408	Lump Sum	500		500	500	
	- Computer Software	1408	Lump Sum	500				
	- Grant Writing	1408	Lump Sum	500				
	- Security Camera System	1408	Lump Sum	500		500	500	
	Total 1408			5,500		4,460	4,460	
PHA – Wide	Administration							

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115204 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	- Facilities Director – 25%, Maintenance Sup 50% Operations Support Assoc. – 50%, Purchasing Agent – 35%	1410	Lump Sum	29,000		29,000	29,000	
	- Employee Benefits	1410	Lump Sum	11,000		11,000	11,000	
	- Proration of Admin Support	1410	Lump Sum	20,000		20,000	20,000	
	Total 1410			60,000		60,000	60,000	
PHA-Wide	Fees and Costs							
	- Clerk-of-the-Works Salary 50% (15 hours per week)	1430	Lump Sum	7,250				
	- Security Camera Maintenance Contract	1430	Lump Sum	500				
	- A/E Fees	1430	Lump Sum	8,500		2,985	2,985	
	- Sundry Planning and In-house Design	1430	Lump Sum	2,250				
	Total 1430			18,500		2,985	2,985	
PHA-Wide	Site Improvements							

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P0115204 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	- Tree Trimming	1450	Lump Sum	5,000				
	- Sidewalk Repairs	1450	Lump Sum	500				
	- Erosion Control	1450	Lump Sum	500				
	- Fencing	1450	Lump Sum	1,500				
	- Reseal/Paving Repair	1450	Lump Sum	1,000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150204 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	

Annual Statement/Performance and Evaluation Report

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

Part II: Supporting Pages

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150204 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	- Drainage Repair/Gutters	1450	Lump Sum	1,000				
	- Landscaping	1450	Lump Sum	5,000				
	- Signage	1450	Lump Sum	1,000				
	- Add Parking Central	1450	Lump Sum	0				
	- Misc Repairs –PHAS	1450	Lump Sum	500				
FL11-4 Westlake Addition.	- Playground Equipment/ Basketball Court	1450	Lump Sum	1,000				
FL11-5 Lakeview Gardens	Site improvements	1450	Lump Sum	0				
		1450	Lump Sum					
FL11-6 Cecil Gober & John Wright	- Playground Improvements (Forced account labor)	1450	Lump Sum	2,000				
	- Water Line Replacement and Individual Meters (Forced account labor)	1450	Lump Sum	500				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150204 Replacement Housing Factor Grant No:				Federal FY of Grant: 2004		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-7 Paul Colton & Bonnet Shores	- Water Line Replacement and Individual Meters (Force account labor)	1450	Lump Sum	500				
	- Playground Improvements (Force account labor)	1450	Lump Sum	500				
	Total 1450			20,500				
PHA-Wide	Dwelling Structures							
	- Exterior Painting	1460	Lump Sum	1,000				
	- Pressure Washing	1460	Lump Sum	500				
	- Exterior/ Screen Doors	1460	Lump Sum	500				
	- Security Window Screens	1460	Lump Sum	500				
	- Exterior Masonry Repairs	1460	Lump Sum	500				
	- Soffet, Fascia, & Gable Repairs	1460	Lump Sum	500				
	- Fire Suppression System	1460	Lump Sum	500				
	- Misc Repairs PHAS	1460	Lump Sum	1,000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150204 Replacement Housing Factor Grant No:				Federal FY of Grant: 2004		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-2 Westlake	- Comprehensive Modernization to include –Exterior Paint, mildew control, central HVAC, dryer/vent/wiring, and range vent hoods	1460	Lump Sum	500				
FL11-4 Westlake Add	Exterior Paint	1460	Lump Sum	500				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150204 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-6 Cecil Gober & John Wright	- Comprehensive Modernization to include utility doors, exterior windows, kitchen and bath modernization, VCT flooring replacement, water supply line replacement, emergency call system, dryer vents, central HVAC, interior & exterior doors and attic insulation, repair termite damage, drywall replacement, HW heater replacement, upgrade elec service (replace aluminum wire and devices) (Forced account labor)	1460	Lump Sum	500				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150204 Replacement Housing Factor Grant No:				Federal FY of Grant: 2004		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL11-7 Paul Colton & Bonnet Shores	- Comprehensive Modernization to include utility doors, exterior windows, kitchen and bath modernization, VCT flooring replacement, water supply line replacement, emergency call system, dryer vents, central HVAC, attic insulation, gutters and downspouts, and interior & exterior doors, repair termite damage, drywall replacement, HW heater replacement, upgrade elec service (replace aluminum wire and devices) (Forced account labor)	1460	Lump Sum	366,000				
	Total 1460			372,500				
1465.1 PHA-Wide	Dwelling Equipment - Appliance Replacement	1465.1	Lump Sum	1,000		1,000	1,000	

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150204 Replacement Housing Factor Grant No:				Federal FY of Grant: 2004		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	Total 1465.1			1,000		1,000	1,000	
1470	Non-Dwelling Structures							
PHA-Wide	- Renovation of Community Buildings	1470	Lump Sum	1,000				
	Total 1470			1,000				
1475	Non-Dwelling Equipment							
PHA-Wide	- Replace Office furniture and equipment	1475	Lump Sum	500				
	- Common Area furniture and fixtures	1475	Lump Sum	500				
	Purchase maintenance vehicles	1475	2	500				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL29P01150204 Replacement Housing Factor Grant No:				Federal FY of Grant: 2004		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	Replacement Equipment including handtruck, floor buffers, wet vacs, spray paint equip., chain saws, backpack sprayers, hvac recovery equip., and drywall spray texture machine)	1475	Lump Sum	2,000				
	Replacement mower	1475	Lump Sum	500				
	Replacement dump trailer	1475	Lump Sum	500				
	Total 1475			4,500				
1495.1	Relocation Costs							
	- Relocation	1495.1	Lump Sum	500				
	Total 1495.1			500				
1498	Mod Used for Development							
	- Development	1498	Lump Sum	1,000				
	Total 1498			1,000				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program No: FL29P01150204 Replacement Housing Factor No:					Federal FY of Grant: 2004	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates	
	Original	Revised	Actual	Original	Revised	Actual		
1406	12/05			6/07				
1408	12/05			6/07				
1410	12/05			6/07				
1430	12/05			6/07				
1450	12/05			6/07				
1460	12/05			6/07				
1465.1	12/05			6/07				
1470	12/05			6/07				
1475	12/05			6/07				
1495.1	12/05			6/07				
1499	12/05			6/07				
1502	12/05			6/07				

Attachment K

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

PHA Name: Lakeland Housing Authority	Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: FL14R011501-04	Federal FY of Grant: 2004
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Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no: 1)
 Performance and Evaluation Report for Period Ending: 06-30-2005 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
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	\$0	\$423,900	\$423,900	\$423,900
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 Replacement Affordable Housing	\$601,210	\$ 177,310	\$0.00	\$0.00
19	1501 Collaterization or Debt Service				
20	1502 Contingency				

Annual Statement/Performance and Evaluation Report

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

PHA Name: Lakeland Housing Authority	Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: FL14R011501-04	Federal FY of Grant: 2004
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no: 1)

Performance and Evaluation Report for Period Ending: 06-30-2005
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
21	Amount of Annual Grant: (sum of lines 2 – 20)	\$601,210	\$601,210	\$423,900	\$423,900
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				

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: FL29P011xxx				Federal FY of Grant: 2004		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA-Wide	Acquisition			0	\$423,900	\$423,900	\$423,900	
	Total 1440			0	\$423,900	\$423,900	\$423,900	
PHA-Wide	Replacement Affordable Housing			\$601,210	\$177,310			
	Total 1499			\$601,210	\$177,310			

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

PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program No: Replacement Housing Factor No: FL29P011xxx					Federal FY of Grant: 2004	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates	
	Original	Revised	Actual	Original	Revised	Actual		
1440		1/05		2/05				
1499	12/04			6/06				

Attachment L

There is no P&E Report for either the 2005 CFP or RHF funds because they had not been distributed to the Lakeland Housing Authority on June 30, 2005.

Attachment M

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary						
PHA Name: Lakeland Housing Authority		Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: FL14R011501-06			Federal FY of Grant: 2006	
<input checked="" 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 No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost		
		Original	Revised	Obligated	Expended	
1	Total non-CFP Funds	0				
2	1406 Operations	0				
3	1408 Management Improvements	0				
4	1410 Administration	0				
5	1411 Audit	0				
6	1415 Liquidated Damages	0				
7	1430 Fees and Costs	0				
8	1440 Site Acquisition	0				
9	1450 Site Improvement	0				
10	1460 Dwelling Structures	0				
11	1465.1 Dwelling Equipment— Nonexpendable	0				
12	1470 Nondwelling Structures	0				
13	1475 Nondwelling Equipment	0				
14	1485 Demolition	0				
15	1490 Replacement Reserve	0				
16	1492 Moving to Work Demonstration	0				
17	1495.1 Relocation Costs	0				
18	1499 Development Activities	303,949				
19	1501 Collaterization or Debt Service	0				

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

PHA Name: Lakeland Housing Authority	Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: FL14R011501-06	Federal FY of Grant: 2006
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Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending: Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
20	1502 Contingency	0			
21	Amount of Annual Grant: (sum of lines 2 – 20)	303,949			
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				

Attachment N Pet Policy

The Lakeland Housing Authority allows for pet ownership in its developments with the written pre-approval of the Housing Authority.

The Lakeland Housing Authority adopts the following reasonable requirements as part of the Pet Policy:

1. Residents are responsible for any damage caused by their pets, including the cost of fumigating or cleaning their units.
2. In exchange for this right, resident assumes full responsibility and liability for the pet and agrees to hold the Lakeland Housing Authority harmless from any claims caused by an action or inaction of the pet.
3. Residents must have the prior written approval of the Housing Authority before moving a pet into their unit.
4. Residents must request approval on the Authorization for Pet Ownership Form that must be fully completed before the Housing Authority will approve the request.
5. Residents must give the Housing Authority a picture of the pet so it can be identified if it is running loose.
6. A pet deposit of \$300 is required at the time of registering a pet.
7. The Lakeland Housing Authority will allow only common household pets. This means only domesticated animals such as a dog, cat, bird, rodent (including a rabbit), fish in aquariums or a turtle will be allowed in units. Common household pets do not include reptiles (except turtles).

All dogs and cats must be spayed or neutered before they become six months old. A licensed veterinarian must verify this fact.

Only one four-legged pet per unit and other non- four-legged pets will be allowed according to this schedule.

Unit Size	Pets
Zero Bedroom	1
One Bedroom	1
Two Bedrooms	1
Three Bedrooms	2
Four or More Bedrooms	2

Any animal deemed to be potentially harmful to the health or safety of others, including attack or fight trained dogs, will not be allowed.

No animal may exceed twenty (20) pounds in weight projected to full adult size.

8. In order to be registered, pets must be appropriately inoculated against rabies, distemper and other conditions prescribed by state and/or local ordinances. They must comply with all other state and local public health, animal control, and anti-cruelty laws including any licensing requirements. A certification signed by a licensed veterinarian or state or local official shall be annually filed with the Lakeland Housing Authority to attest to the inoculations.
9. The Lakeland Housing Authority, or an appropriate community authority, shall require the removal of any pet from a project if the pet's conduct or condition is determined to be a nuisance or threat to the health or safety of other occupants of the project or of other persons in the community where the project is located.

Attachment O
Conversion Analysis

- a. How many of the PHA’s developments are subject to the Required Initial Assessments? **4**
- b. How many of the PHA’s developments are not subject to the Required Initial Assessments based on exemptions (e.g., elderly and/or disabled developments not general occupancy projects)? **1**
- c. How many Assessments were conducted for the PHA’s covered developments? **4**
- d. Identify PHA developments that may be appropriate for conversion based on the Required Initial Assessments:

Development Name	Number of Units
None	

d. If the PHA has not completed the Required Initial Assessments, describe the status of these assessments:

Attachment P
Section 8 Homeownership Capacity Statement

The Lakeland Housing Authority's Section 8 Homeownership Program has the required capacity because a purchasing family must invest at least three percent of the purchase price of the home they are buying in the property. This can take the form of either a down payment, closing costs, or a combination of the two. Of this sum, at least one percent of the purchase price must come from the family's personal resources.

In addition, the family must qualify for the mortgage loan under a lender's normal lending criteria taking into account the fact that this is by definition a low-income family.

RESPONSES

**LAKELAND HOUSING AUTHORITY
RESIDENT ADVISORY ASSOCIATION (LHARAA)**
(September 29, 2005 Resident Board Meeting @ Central Offices)

QUESTION 1	LHARAA Board Members indicated they only have one binder of the LHA 2006 Agency Plan; therefore they have not completed their review of the plan thus requiring more time to provide their feedback.
RESPONSE	Earl believed that there was a second agency plan binder prepared.
ACTION	One copy provided to Lillie Brown on 10/03/05.
QUESTION 2	Objectives under Goal #2 are not 100% complete and needs to be changed.
RESPONSE	Steve had previously noted this change and will see that it is made on the PowerPoint Presentation.
ACTION	Steve to make the above described change to the PowerPoint Presentation.
QUESTION 3	Regarding Goal #5. Resident children @ Westlake not enrolled in the After School Program went to the computer lab and were asked to leave. LHA needs to insure that these children have access to the computer lab.
RESPONSE	Earl indicated that when the After School Program is in session, children not enrolled in the program may use the Kid's House Program. LHA has other service providers who can assist in this area. Earl confirmed with the board that the children mentioned by LHARAA were ages 15 and up.
ACTION	Youth Services Coordinator will schedule the overflow of computer access, for this age group, if necessary, for service providers such as YMCA Par 3, Boys & Girls Club, Simpson Park, New Life Outreach Ministry, Inc., and/or the Larry R. Jackson Public Library.
QUESTION 4	How does LHA plan to obtain Goal Number 5, Objective Number 5? Increase the number of LHA seniors and people with disabilities using LHA sponsored programs by 20% by December 31, 2009.
RESPONSE	Seniors were surveyed to determine how many residents are currently participating in LHA offered programs in order to determine how many more residents to solicit for their participation in the programs.
ACTION	LHA will continue collaboration with VISTE, Polk County Opportunity Council and the Polk County Elderly Services. These agencies will also assist with encouraging the involvement of elderly residents. PCOC is currently providing on-site service at Gober Villas. Luncheons (Social Security Workshop) will be held on 10/06/05 at Gober Villa and will be scheduled at The Manor in the near future.
QUESTION 5	When the term "LHA Seniors" is used, does that include Section 8, HOPE VI, public housing and tax credit seniors?
RESPONSE	Yes; however, LHA cannot spend Public Housing dollars on Section 8 or other residents.

RESPONSES

QUESTION 6	<ol style="list-style-type: none"> 1. Does LHA have a volunteer coordinator in place to assist in the tracking and deficiency notification to residents regarding community service hours performed by residents? 2. Is this being tracked monthly? 3. Is the CSS department meeting with the family before sending a notice of non-compliance? 4. When are the notifications of non-compliance being sent to the residents? 5. If notifications are not being sent to the residents monthly, it is recommended that LHA send the notifications quarterly. Maybe quarterly, since residents have all year to perform the hours. 6. Does LHA have agreements concerning community service hours with all residents? 7. Ms. Tonda Jiles asked several times if our paperwork was correct and people were signing the documents that make it clear about the requirement for hours, and the repercussion of eviction.
RESPONSE	<ol style="list-style-type: none"> 1. No. The coordinator is the individual who signs the volunteer's time sheet. Mr. Hugh was in charge of this process and had a volunteer who helped him. Earl personally monitors the service hour commitments of the residents. 2. No; however, LHA staff will look into how to track this data. 3. This meeting takes place prior to the resident's initial move-in by PH Managers. 4. Ninety (90) days prior to the resident's re-certification date. Earl also tries to put a reminder to the residents, in the newsletter every six months regarding community service hours. 5. Non-compliance notification regarding community service hours is a congressional non-funded mandate. Earl to review paragraph in the ACOP regarding these notifications and to insure that it only states exactly what LHA is going to do. Monthly reminders sounds like an administrative burden. Since we mail monthly rent statements, we could have Pam stuff the reminder in the non-compliant resident statements quarterly. 6. Yes. The community service hour resident commitment is included in their lease as well as a separate agreement that outlines the resident's community service hour commitment. 7. Earl to show LHA's paperwork to the LHARAA Board concerning this matter. <p>Note: HUD recently completed an audit of the CSS Department's community service forms and indicated while here that, if anything, the CSS Department is lenient concerning community service hours. Herb will review the written findings of this audit upon LHA's receipt of it.</p> <p>Earl stated that LHA has about seventy (70) residents that are coming up on re-certification that owe community service hours.</p>

RESPONSES

ACTION	<ul style="list-style-type: none"> • Earl to provide a rent calculation packet to LHARAA that includes a copy of the Resident Community Service hour agreement and the resident lease agreement. • Clarification from HUD to be sought concerning the community service hour agreements and lease agreements as it relates to when hours must be completed, grace period, etc. • <u>Earl to review paragraph in the ACOP and identify changes, if any, e.g. monthly notification to quarterly.</u> • Earl to provide Herb the schedule of the seventy (70) residents mentioned in the meeting that will soon arrive at their annual re-certification date that owe community service hours. The schedule to include names, expiration of non-renewal, etc. This information is in Lindsey and a report can be run for these individuals through the SQL Reports. For the period October 2003 – October 2005, there has been a substantial decrease in the number of residents that had defaulted with CSSR.44. Residents moved, found jobs, enrolled in a training program or were evicted. On the other hand, for the period of October 2005 through October 2007, another 47 residents were added to the CSSR list. The numbers will fluctuate from day-to-day. (Admin nightmare) Earl needs more time to provide detailed report, because the findings are very interesting.
QUESTION 7	LHA is proposing to raise the minimum rent from \$25 to \$50. Need LHARAA's feedback.
RESPONSE	Will review and respond at meeting scheduled for 10-6-05.
ACTION	LHARAA will review and respond at meeting scheduled for 10-6-05.
QUESTION 8	Shouldn't we make the preferences consistent between public housing and section 8?
RESPONSE	Possible change to agency plan.
ACTION	<u>Determination to be made as to whether the preferences will be made uniform in the agency plan.</u>
QUESTION 9	LHARAA needs all the equipment ordered for their office to be installed and set-up for operation. (computer, copy machine, etc.)
RESPONSE	Steve to follow through with Michelle and Cole.
ACTION	Steve to follow through with Michelle and Cole.
QUESTION 10	Will LHA trainees be eligible for Employee of the Month and how will LHA trainees be rewarded for outstanding performance?
RESPONSE	Policy #18 states that awards may be issued throughout the year to any associate regardless of their employment status. The ED has the final approval on all awards.
ACTION	LHA trainees shall be eligible for the Employee of the Month award.
QUESTION 11	When is the next LHARAA meeting?
RESPONSE	Thursday, October 6, 2005 @ 4 PM
ACTION	Attend meeting

RESPONSES

**LAKELAND HOUSING AUTHORITY
RESIDENT ADVISORY ASSOCIATION (LHARAA)**
(October 6, 2005 Resident Board Meeting @ Central Offices)

QUESTION 1	Rails have not been placed on the back steps of units where disabled residents live. Units have rails on the fronts, however when the front doors are blocked, disabled residents are unable to use their back exits.
RESPONSE	It was determined that this question pertains mainly to West Lake. Jim indicated that as long as we are aware of any existing problems, we would make sure there is a secondary emergency exit. Disabled was also determined by LHARAA to mean anyone with mobility impairment, not just residents who live in a handicap unit. Residents were strongly encouraged to use the work order system. It allows for addressing specific resident needs on a one-on-one basis. If residents will indicate, through the work order system, that they have a need for rails on their rear entry steps, we can insure that they are put in place. Under no circumstances should any entrance to an apartment be blocked.
ACTION	Jim will pull a work order report to make sure all requests have received action.
QUESTION 2	The last steps on some units are too steep and residents can fall if they are not aware of this. Are there some building regulations that LHA can be guided by on this concern?
RESPONSE	Most of the steps have been replaced (West Lake). We are meeting building regulations. HUD inspects our properties every year and we are in compliance.
ACTION	Maintenance to provide a list of units with this concern to Jim Driskell. Ms. Brown to provide a list of units with this concern.
QUESTION 3	LHARAA asked about sidewalks and this has not yet been addressed.
RESPONSE	We have an ongoing program for sidewalk repair. Last year we replaced between three and four hundred linear feet of sidewalk at Bonnet Shores and Cecil Gober. Due to the root systems of the oaks at West Lake, we are continually making sidewalk repair at this complex.
ACTION	LHARAA to provide specific locations where repair is needed.
QUESTION 4	Dim or no lighting continues to be a problem in some of LHA's complexes. We have repeatedly made reports on these concerns but they have not been addressed. Ms. Brown stated that in the complex itself (West Lake) some areas seem dark. Earl stated that the entry streetlight at Paul Colton might have been out.
RESPONSE	If LHARAA will provide specific area(s) of concern and give us direction as to which areas need additional lighting, we will look into the lighting in those specific areas. We are interested in everyone's safety. Again, residents were encouraged to use the work order system because once the work order is placed; the specific need has been identified and can be met.
ACTION	LHARAA to perform lighting poll and advise LHA as to the results.

RESPONSES

QUESTION 5	The appearance of the Youth Center is bad.
RESPONSE	The interior of the Youth Center will be painted over a weekend in the next few weeks. Some of our resident youth will be participating in this project. It instills a sense of pride. New ceiling tile has been ordered. A sign for the Youth Center will be ordered and determination made as to its best placement (visibility).
ACTION	Paint interior of Youth Center over the weekend in the next few weeks, order and install Youth Center sign, place sign in position for best visibility.
QUESTION 6	Portability: Regarding the Portability section of Lakeland Housing Authority Section 8 Administrative Plan, are we correct in assuming that the purpose for the changes to this section is primarily due to the recent hurricanes that our area has been subjected to? Kindly let us know what are the effects of the new language and the language that is being struck.
RESPONSE	<p>LHA's consultant, Joe Schiff, provided the HUD required changes. HUD is attempting to clarify what the roles and responsibilities of both the housing authority with a resident porting out and of the housing authority with a resident porting in. HUD is trying to further define the boundaries of each with their required changes and potential new laws concerning state-to-state ports.</p> <p>Section 8, in fiscal year 2004, overspent its' budget by \$250k in large part due to folks porting to areas of the US with a much higher fair market rent than we have in Polk County. LHA has to pay these higher housing costs on these individuals' behalf, which depletes LHA resources.</p> <p>Please note: This is more a procedural issue than a policy.</p>
ACTION	None
QUESTION 7	Assistance and Rent Formulas: LHARAA does not agree with the increase of \$50.00. Although we agree that there should be an increase, we feel that doubling the minimum rent would bring about undo hardship for families. We feel that \$35.00 would be a more reasonable amount.
RESPONSE	<p>Public Housing: Dwelling rent is one of the only revenue line items that PHAs are able to control, to a certain point. We have, in fiscal year 2005, seen the largest subsidy cut in history (11%). In order to maintain Public Housing properties as we have in the past, we need to increase the minimum rent to the maximum capacity.</p> <p>Please be aware that the LHA Utility Allowances increased on average, between 18% to 40% in July 2005. For a 2 Bedroom Unit this equates to an increased monthly allowance of \$22. This would help offset the addition in the minimum rents. The Utility Allowance will be monitored closely given our current economy, and if utilities increase by more than 10%, LHA will adjust accordingly.</p> <p>Also, if a resident encounters difficulty meeting the minimum rent, we have a "hardship clause" that may be implemented upon receipt of documentation from the resident evidencing the hardship.</p> <p>Section 8: With minimum rents increased in S8, LHA will pay less in subsidy and the client will pay more. This will allow more families to be assisted under the S8 program.</p>
ACTION	Recommendation from LHA staff remains to increase the minimum rent from \$25.00 to \$50.00.

RESPONSES

QUESTION 8	How is hardship determined and is it assessed on a monthly basis?
RESPONSE	Hardship is determined by review of the resident's documentation to conclude that income levels are below HUD criteria for payment of minimum rents. Yes, hardship is assessed on a monthly basis. The resident would need to talk to their manager on a monthly basis.
ACTION	None
QUESTION 9	Section 11.5 ASSISTANCE AND RENT FORMULAS "V. If the Lakeland Housing Authority finds it necessary to terminate an owner's contract for a breach, that owner and any party related to that owner shall not participate in the program for five years from the date of the breach." LHARAA would like for LHA to maybe reconsider or define "any party related to".
RESPONSE	This wording "any party related to" shall be better defined upon further research.
ACTION	Prepare definition of term and update policy.
QUESTION 10	28.0 COST SAVING POSSIBILITIES: LHARAA understands the reason for cost saving issues with the changes in Congress and with HUD. However, there are concerns, specifically under sections "L" and "M". If interpreted correctly, these seem to mean that a family may be required to pay an increase in rent within a month's notice. This could cause extreme hardship on low-income residents and has the possibility of forcing families to face homelessness.
RESPONSE	The "hardship clause" applies here as well. Once the plan is approved, the executive director is authorized to implement any of these items without a return to the board for approval. Additional language to "L" and "M" to indicate these options would be considered based on the financial situation of the housing authority.
ACTION	Additional language to "L" and "M" to indicate these options would be considered based on the financial situation of the housing authority.
QUESTION 11	ACOP 13.7 – re: paying rent, language says "... rent not paid by the 7 th ..."
RESPONSE	Should be changed back to the 10 th of each month.
ACTION	Change language to read "... rent not paid by the 10 th ..."
QUESTION 12	May LHARAA have a board member on the Grievance Board?
RESPONSE	Yes, we will add a LHARAA member to the hearing panel.
ACTION	LHARAA to advise which board member to install on the hearing panel.

RESPONSES

QUESTION 13	Goal 5, Objective # 1: Assist children who reside in LHA properties to attain academic success as measured by increases in FCAT scores so that the percentage passing the FCAT equals or exceeds the Polk County average.
RESPONSE	<p>Rodney doesn't think the numbers are significant in the 15 and up age range. Rodney is conducting a survey to determine the number of resident youth participants who are participating in programs provided by partner providers.</p> <p>We first need to identify the use and need in order to determine the children that do not have access.</p> <p>None of the providers charge a fee for program participation with the exception of the YMCA and we are working on this issue with this partner.</p>
ACTION	Conduct a Needs Assessment Study. Take action pursuant to findings.
QUESTION 14	Goal 5, Objective #4: LHA shall assist its non-elderly non-disabled public housing residents increase the LHA average annual household income by 35% by December 31, 2009.
RESPONSE	HUD has accepted our 35% goal for this year and the coming years; however, we can point out in the report that this is a difficult goal to meet. This topic requires more discussion. Do we have a baseline from a past year? How many are working vs. not working? How many Zero income renters vs. income renters? Participation in income generating activities?
ACTION	More discussion
QUESTION 15	Is there an FSS Presentation at all new orientations (PH and Section 8)?
RESPONSE	There is a forum at the initial move in for residents to see if the family is interested in FSS.
ACTION	Linda Willis does attend S8 orientation, however, PH orientations are handled one on one with the Housing Manager, which Linda does not attend. Linda does go door to door in the Ph complexes to spark interest.
QUESTION 16	ACOP Pg. 52 14.4 Volunteer Opportunities: Together with the resident advisory councils, the Lakeland Housing Authority may create volunteer positions such as hall monitoring, litter patrols, and supervising and record keeping for volunteers. What is this referring to?
RESPONSE	Volunteer opportunities for community service.
ACTION	None
QUESTION 17	Shouldn't we make the preferences consistent between public housing and section 8?
RESPONSE	Possible change to agency plan.
ACTION	LHA will further discuss with LHARAA over the coming months.

Attachment R

IMPLEMENTATION PLAN FOR RESIDENT COMMUNITY SERVICE REQUIREMENTS

The Lakeland Housing Authority identified all adult family members who are apparently not exempt from the community service requirement.

The Lakeland Housing Authority notified all such family members of the community service requirement and of the categories of individuals who are exempt from the requirement. The notification provided the opportunity for family members to claim and explain an exempt status. The Lakeland Housing Authority verified such claims.

The notification advised families that their community service obligation began upon the effective date of their first annual reexamination on or after January 1, 2001. For families paying a flat rent, the obligation begins on the date their annual reexamination would have been effective had an annual reexamination taken place. It also advised them that failure to comply with the community service requirement will result in ineligibility for continued occupancy at the time of any subsequent annual reexamination.

A Tracking-Performance Measurement Data System has been developed to insure the timely implementation and monitoring of the above-described Implementation Plan for the Resident Community Service Requirements.