

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

PHA Plans

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: [Oakdale Housing Authority](#)

PHA Number: [LA033](#)

PHA Fiscal Year Beginning: (mm/yyyy) [10/2006](#)

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)

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.

Due to a low PHAS score in 2004, the Oakdale Housing Authority (OHA) was placed on HUD's troubled list. The OHA was designated Substandard Physical Performer. The OHA has corrected all physical deficiencies cited by the REAC inspector. The Oakdale Housing Authority will improve its REAC Physical Condition score with considerable improvements in all three developments. With the installation of central air conditioning/heating units in all one-bedroom units, the problem of blocked fire exits by air conditioners in the bedroom window will be resolved. The OHA plans to install central air conditioning/heating units in all of its units. The problem of inoperable smoke alarms has been aggressively addressed by the OHA. Despite repeated warnings of the danger of disconnecting a smoke alarm or removing its battery, a few tenants continue to do so. The maintenance staff is diligent in rectifying this problem during scheduled inspections of the units. A change in the OHA maintenance staff was implemented in December 2005 in order to enhance performance.

As a result of the low 2004 PHAS score, the OHA entered into a Memorandum of Agreement (MOA) with the HUD Office of Public and Indian Housing, the MOA term being from August 1, 2005 to July 31, 2006. The MOA process has been implemented and is reviewed monthly by the OHA. Progress reports are submitted to the New Orleans field office as requested. An Energy Audit was performed by Management Resource Group, Inc. in March 2006, and the results are incorporated in the 2005-2009 Action Plan as specified in the MOA. As of March 31, 2006, six of the eight tasks outlined in the MOA were completed. The following tasks were not completed:

1. Indicator #1 Physical Conditions of the Property Maintenance Operational Area (no REAC inspection performed since 2004) and
2. #7.1 Attend Capital Fund Training of the Capital Funds Operational Area (no local seminar scheduled as of 3-31-06, no funds available for out-of-state travel). It should be noted that the OHA received a perfect score for the Capital Fund Sub-Indicator.

In December 2005, an Independent Assessment of the OHA was conducted by North American Management. Although the OHA received a low score of 16 on the PASS component of the PHAS score, all public housing operational areas and the Section 8 program (2004 SEMAP score 100) were assessed. Areas for improvement and recommendations were identified and will be implemented by the OHA. Subsequent to the Independent Assessment, the term of the MOA was changed to April 1, 2006 to March 31, 2007.

Analysis of tenant incomes for FYE 09-30-2005 established that the public housing and Section 8 programs exceeded HUD admission requirements regarding families with incomes below 30 percent of the Area Median Income (AMI). Calculation of the OHA Established Income Range (EIR) revealed that the OHA EIR is below 30 percent of the AMI. Designation of the Claudia Circle development as a higher income development is the result of the following: the Claudia Circle development has 26 (twenty-six) dwelling units, fewer vacant unit turnarounds, and a few working families. Although the OHA feels deconcentration would not be fostered by efforts to place “lower income families” in the Claudia Circle development where average family income is 32 (thirty-two) percent below the AMI, the OHA will continue to employ HUD requirements regarding public housing admissions by admitting families with incomes in the extremely low income level in the Claudia Circle development dependent on availability of vacant dwelling units.

An Independent Public Audit (IPA) was conducted by Mike Estes and Associates for FYE 09-30-2005. No findings were appreciated.

The OHA will direct its efforts **within budget constraints** to achieve its 5-Year Mission and goals to meet the needs of the community it serves. Revision of the 2006 CFP Annual Statement was required because the OHA received 58% of funds requested for capital improvements.

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:

- A. Admissions Policy for Deconcentration 46
- B. FY 2006 Capital Fund Program Annual Statement 48
- C. Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY) 51

Optional Attachments:

- D. PHA Management Organizational Chart 78
- E. FY 2006 Capital Fund Program 5 Year Action Plan 79
- Public Housing Drug Elimination Program (PHDEP) Plan
- F. Comments of Resident Advisory Board or Boards – RAB Membership 83
(must be attached if not included in PHA Plan text)
- Other (List below, providing each attachment name)
- G. Performance and Evaluation Reports for Open CFP Grants 84
- H. Progress Meeting Mission and Goals 2005-2009 90
- I. Criteria for Substantial Deviations and Significant Amendments 93
- J. Community Service Requirements 94
- K. MOA between OHA and HUD Office of Public and Indian Housing 95

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
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	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
X	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair	Annual Plan: Housing Needs

List of Supporting Documents Available for Review

Applicable & On Display	Supporting Document	Applicable Plan Component
	Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	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
X	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
X	Schedule of flat rents offered at each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs

List of Supporting Documents Available for Review

Applicable & On Display	Supporting Document	Applicable Plan Component
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	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
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
X	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 (Initial assessment included with 2002 Annual Plan)	Annual Plan: Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
X	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
	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
X	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
X	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)
X	Independent Assessment by North American Management, December 2005	Annual Plan: Operations and Maintenance
X	2004 PHAS and SEMAP scores	Annual Plan: Operations and Maintenance
X	Energy Audit by Management Resource Group, Inc., March 2006	Annual Plan: Operations and Maintenance
X	U.S. Census Bureau data, National Low Income Housing Coalition data, summary of public housing waiting list	Annual Plan: Housing Needs

List of Supporting Documents Available for Review

Applicable & On Display	Supporting Document	Applicable Plan Component
X	Continuity of Operations Plan, created June 2006	Annual Plan: Operations and Maintenance

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-ibility	Size	Loca-tion
Income <= 30% of AMI	63	4	3	1	1	2	1
Income >30% but <=50% of AMI	126	3	3	1	1	2	1
Income >50% but <80% of AMI	110	3	3	1	1	2	1
Elderly	222	3	3	1	3	2	1
Families with Disabilities	285	3	3	1	3	2	1
Single Females with children	156	4	3	1	1	2	1
Race/Ethnicity							
Race/Ethnicity							
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: [State of Louisiana](#)
Indicate year: 2005-2009
- 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)
National Low Income Housing Coalition 2000 data

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/>	Section 8 tenant-based assistance		
<input checked="" type="checkbox"/>	Public Housing		
<input type="checkbox"/>	Combined Section 8 and Public Housing		
<input type="checkbox"/>	Public Housing Site-Based or sub-jurisdictional waiting list (optional)		
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	53		49 (in 2005)
Extremely low income <=30% AMI	48	90.6%	
Very low income (>30% but <=50% AMI)	0	0.0%	
Low income (>50% but <80% AMI)	5	9.4%	
Families with children	23	43.4%	
Elderly families	4	7.5%	
Families with Disabilities	5	9.4%	
Race/ethnicity (Black)	31	58.5%	
Race/ethnicity (White)	22	41.5%	
Race/ethnicity			
Race/ethnicity			

Housing Needs of Families on the Waiting List

Characteristics by Bedroom Size (Public Housing Only)			
1BR	28	52.8%	
2 BR	11	20.8%	
3 BR	11	20.8%	
4 BR	3	5.6%	
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes: N/A How long has it been closed (# of months)? Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

Housing Needs of Families on the Waiting List

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	98		35 (in 2005)
Extremely low income <=30% AMI	79	80.6%	
Very low income (>30% but <=50% AMI)	14	14.3%	
Low income (>50% but <80% AMI)	5	5.1%	

Housing Needs of Families on the Waiting List

Families with children	65	66.3%	
Elderly families	1	1.0%	
Families with Disabilities	15	15.3%	
Race/ethnicity (Black)	44	44.9%	
Race/ethnicity (White)	54	55.1%	
Race/ethnicity			
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes: N/A How long has it been closed (# of months)? Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

C. Strategy for Addressing Needs

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

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

Select all that apply

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

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select all that apply

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

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

- Seek designation of public housing for the elderly
- Apply for special-purpose vouchers targeted to the elderly, should they become available
- Other: (list below)
[Employ admissions preferences aimed at the elderly](#)

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)
[Employ admissions preferences aimed at families with disabilities](#)

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)		

**Financial Resources:
Planned Sources and Uses**

Sources	Planned \$	Planned Uses
a) Public Housing Operating Fund	\$277,660.00	
b) Public Housing Capital Fund	\$210,257.00	
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	\$315,674.00	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants		
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
2. Prior Year Federal Grants (unobligated funds only) (list below)		
FFY 2004 (100% obligated)	\$0.00	
FFY 2005 (100% obligated)	\$0.00	
3. Public Housing Dwelling Rental Income	\$201,400.00	Public Housing Operations
4. Other income (list below)		
Interest income	\$7,000.00	Public Housing Operations
Late fees, maintenance charges	\$11,100.00	Public Housing Operations
5. Non-federal sources (list below)		
Reserves	\$115,000.00	Emergency Fund
Total resources	\$1,138,091.00	

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 interviewed after completion of application
When offered a dwelling unit

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
Rental history if previous public housing resident
- Housekeeping
- Other (describe)

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

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

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

(2)Waiting List Organization

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

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

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

- PHA main administrative office
- PHA development site management office
- 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**

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

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

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

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

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

(3) Assignment

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

- One
- Two
- Three or More

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

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

(4) Admissions Preferences

a. Income targeting:

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

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)

Medical justification, under housed, over housed transfers shall be mixed in a ratio of 1 transfer to 5 new admissions

c. Preferences

1. Yes No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If “no” is selected, skip to subsection (5) **Occupancy**)
2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences:

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

Other preferences: (select below)

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

3. If the PHA will employ admissions preferences, please prioritize by placing a “1” in the space that represents your first priority, a “2” in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point

system), place the same number next to each. That means you can use “1” more than once, “2” more than once, etc.

1 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)

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

4. Relationship of preferences to income targeting requirements:

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

(5) Occupancy

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

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

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

- At an annual reexamination and lease renewal
- Any time family composition changes

- At family request for revision
- Other (list)

(6) Deconcentration and Income Mixing

a. Yes No: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?

b. Yes No: Did the PHA adopt any changes to its **admissions policies** based on the results of the required analysis of the need to promote deconcentration of poverty or to assure income mixing?

c. If the answer to b was yes, what changes were adopted? (select all that apply)

Adoption of site-based waiting lists

If selected, list targeted developments below:

Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments

If selected, list targeted developments below:

[Claudia Circle and Bowman Hicks developments](#)

Employing new admission preferences at targeted developments

If selected, list targeted developments below:

[Claudia Circle and Bowman Hicks developments](#)

Other (list policies and developments targeted below)

d. Yes No: Did the PHA adopt any changes to **other** policies based on the results of the required analysis of the need for deconcentration of poverty and income mixing?

e. If the answer to d was yes, how would you describe these changes? (select all that apply)

Additional affirmative marketing

Actions to improve the marketability of certain developments

Adoption or adjustment of ceiling rents for certain developments

Adoption of rent incentives to encourage deconcentration of poverty and income-mixing

Other (list below)

f. Based on the results of the required analysis, in which developments will the PHA make special efforts to attract or retain higher-income families? (select all that apply)

Not applicable: results of analysis did not indicate a need for such efforts

List (any applicable) developments below:

Bowman Hicks development

g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower-income families? (select all that apply)

Not applicable: results of analysis did not indicate a need for such efforts

List (any applicable) developments below:

[Claudia Circle development – see Executive Summary for comments regarding deconcentration](#)

B. Section 8

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

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

(1) Eligibility

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

Criminal or drug-related activity only to the extent required by law or regulation

Criminal and drug-related activity, more extensively than required by law or regulation

More general screening than criminal and drug-related activity (list factors below)

Other (list below)

[Rental history if previous public housing resident](#)

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)

[Rental history if previous public housing or Section 8 resident](#)

(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:

(4) Admissions Preferences

a. Income targeting

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

b. Preferences

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

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

Former Federal preferences

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

Other preferences (select all that apply)

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

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

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

1 Date and Time

Former Federal preferences

- 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)

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

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

- 1 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

The OHA does not administer a special-purpose Section 8 program

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)

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

The PHA will not employ any discretionary rent-setting policies for income based rent in public housing. Income-based rents are set at the higher of 30% of adjusted monthly income, 10% of

unadjusted monthly income, the welfare rent, or minimum rent (less HUD mandatory deductions and exclusions). (If selected, skip to sub-component (2))

---or---

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

b. Minimum Rent

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

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

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

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

[Addressed in Rent Determination section of PHA ACOP Manual](#)

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:

[Minimum rent: \\$50.00](#)

[Ceiling rents: 1-Bedroom \\$215.00, 2-Bedroom \\$237.00, 3-Bedroom \\$305.00,
4 -Bedroom \\$385.00](#)

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

- For the earned income of a previously unemployed household member
 For increases in earned income
 Fixed amount (other than general rent-setting policy)
If yes, state amount/s and circumstances below:

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

- For household heads

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

e. Ceiling rents

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

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

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

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

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

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

f. Rent re-determinations:

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

- Never
- At family option
- Any time the family experiences an income increase
- Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold)_____

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) **not applicable**

- 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)

[See Rent Determination of Section 8 Administrative Plan](#)

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.[\(attachment D\)](#)
- 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 10-1-05	Expected Turnover
Public Housing	146	
Section 8 Vouchers	110	
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers (list individually)		
Public Housing Drug Elimination Program (PHDEP)		
Other Federal Programs(list individually) N/A		

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)
[ACOP Manual, Maintenance Manual, Personnel Policy & Procedure Manual, Policy Manual](#)
- (2) Section 8 Management: (list below)
[Section 8 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 (state name) [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 (state name) [attachment E](#)

-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:

2. Development (project) number:

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

- Revitalization Plan under development
- Revitalization Plan submitted, pending approval
- Revitalization Plan approved
- Activities pursuant to an approved Revitalization Plan underway

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

Yes No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?
If yes, list developments or activities below:

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

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

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

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

2. Activity Description

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

Demolition/Disposition Activity Description
1a. Development name:
1b. Development (project) number:
2. Activity type: Demolition <input type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: <u>(DD/MM/YY)</u>

5. Number of units affected: 6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: b. Projected end date of activity:

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

[24 CFR Part 903.7 9 (i)]

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

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

2. Activity Description **N/A**

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

Designation of Public Housing Activity Description
1a. Development name: 1b. Development (project) number:
2. Designation type: Occupancy by only the elderly <input type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA’s Designation Plan <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: (DD/MM/YY)

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

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:
<p>2. What is the status of the required assessment?</p> <p><input type="checkbox"/> Assessment underway</p> <p><input type="checkbox"/> Assessment results submitted to HUD</p> <p><input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question)</p> <p><input type="checkbox"/> Other (explain below)</p>
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)

- Conversion Plan in development
- Conversion Plan submitted to HUD on: (DD/MM/YYYY)
- Conversion Plan approved by HUD on: (DD/MM/YYYY)
- 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)

- Units addressed in a pending or approved demolition application (date submitted or approved: _____)
- Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: _____)
- 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: 1b. Development (project) number:
2. Federal Program authority: <input type="checkbox"/> HOPE I <input type="checkbox"/> 5(h) <input type="checkbox"/> Turnkey III <input type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one) <input type="checkbox"/> Approved; included in the PHA’s Homeownership Plan/Program <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: (DD/MM/YYYY)
5. Number of units affected: 6. Coverage of action: (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> 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 (l)]

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? 26/08/99

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)

(2) Family Self Sufficiency program/s

(Not applicable)

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2005 Estimate)	Actual Number of Participants (As of: DD/MM/YY)
Public Housing		
Section 8		

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

C. Welfare Benefit Reductions

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)
- Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies
 - Informing residents of new policy on admission and reexamination
 - Actively notifying residents of new policy at times in addition to admission and reexamination.
 - Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
 - Establishing a protocol for exchange of information with all appropriate TANF agencies
 - Other: (list below)

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

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.7 9 (m)]

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

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

1. Describe the need for measures to ensure the safety of public housing residents (select all that apply)
- High incidence of violent and/or drug-related crime in some or all of the PHA's developments
 - High incidence of violent and/or drug-related crime in the areas surrounding or adjacent to the PHA's developments
 - Residents fearful for their safety and/or the safety of their children
 - Observed lower-level crime, vandalism and/or graffiti
 - People on waiting list unwilling to move into one or more developments due to perceived and/or actual levels of violent and/or drug-related crime
 - Other (describe below)

2. What information or data did the PHA used 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)

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

[Bowman Hicks development](#)

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)

[Installation of video cameras to deter crime and/or drug activities](#)

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

[Bowman Hicks](#)

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)
[Request regular police patrols of PHA properties](#)
[Encourage use of police sub-station on PHA premises](#)

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

[Bowman Hicks development](#)

D. Additional information as required by PHDEP/PHDEP Plan

PHAs eligible for FY 2005 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

- Yes No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes No: Has the PHA included the PHDEP Plan for FY 2005 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? (not applicable)
If yes, how many unresolved findings remain? _____
5. Yes No: Have responses to any unresolved findings been submitted to HUD? (not applicable)

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? (not applicable)

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 (File name)

Provided below:

3. In what manner did the PHA address those comments? (select all that apply) (not applicable)

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

The PHA changed portions of the PHA Plan in response to comments
List changes below:

Other: (list below)

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

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

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

3. Description of Resident Election Process

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

Candidates were nominated by resident and assisted family organizations

Candidates could be nominated by any adult recipient of PHA assistance

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

Other: (describe)

b. Eligible candidates: (select one)

Any recipient of PHA assistance

Any head of household receiving PHA assistance

Any adult recipient of PHA assistance

Any adult member of a resident or assisted family organization

Other (list)

c. Eligible voters: (select all that apply)

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

- Representatives of all PHA resident and assisted family organizations
- Other (list)

C. Statement of Consistency with the Consolidated Plan

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

1. Consolidated Plan jurisdiction: (provide name here)

State of Louisiana

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)
Housing needs to be addressed

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

State official certification of OHA Agency Plan consistency with Consolidated Plan FY 2005-2009

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 Policy

Summary of Deconcentration Study: Public Housing and Section 8 - FYE: 09-30-05

Adopted: July 7, 1999
Effective: July 7, 1999
Revised: September 27, 2002

DECONCENTRATION POLICY

It is the policy of the Oakdale Housing Authority to house families in a manner that provides for the deconcentration of poverty and income mixing in public housing and to ensure access to housing assistance for the poorest of families (families with incomes at or below 30% of the Area Median Income).

Objectives:

To house no less than 40% of its public housing units with families that have income at or below 30% of the Area Median Income (AMI).

To house no less than 75% of its Section 8 inventory with families that have income at or below 30% of the Area Median Income (AMI).

To take actions to ensure that no individual public housing development has a concentration of lower or higher income families.

Strategies:

1. At the beginning of each fiscal year, the OHA will establish a goal to house 40% of new public housing admissions and 75% of new Section 8 participants with families whose incomes are at or below 30% of the AMI. The annual goal will be evaluated by analysis of incomes of families admitted to the public housing and Section 8 programs during the previous fiscal year.

2. In order to comply with deconcentration of poverty and income mixing requirements in public housing, the OHA will track the status of family income, PHA-wide and by development, on an annual basis. Analysis of tenant income will be based on families in residence in public housing at the end of the fiscal year.

a. The Established Income Range (EIR) will be calculated according to HUD guidelines.

b. Families with income greater than 115% of the EIR will be designated "higher income" families. Families with income less than 85% of EIR will be designated "lower income" families.

c. Developments with tenants whose average income is greater than 115% EIR will be designated "higher income" developments. Developments with tenants whose average income is less than 85% EIR will be designated "lower income" developments.

d. If a public housing development has a concentration of lower or higher income families, the OHA will take action to resolve the finding.

SUMMARY OF DECONCENTRATION STUDY: PUBLIC HOUSING AND SECTION 8 FYE: 09-30-05

Attachment A: Deconcentration Policy

Summary of Deconcentration Study: Public Housing and Section 8 - FYE: 09-30-05

Analysis of new admissions to the OHA public housing and Section 8 programs revealed the following:

1. PHA: 90% of new admissions had incomes below 30% of the AMI (44 of 49)
Conclusion: OHA exceeded HUD admission requirements of 40%
2. Section 8: 81% of new admissions had incomes below 30% of the AMI (35 of 43)
Conclusion: OHA exceeded HUD admission requirements of 75%

Deconcentration of poverty & income mixing of public housing tenants

Based on HUD guidelines and OHA tenant income data in September 2005 the Established Income Range (EIR) for the OHA was calculated. The Pear Orchard development is within the EIR, the Bowman Hicks development is below the EIR, and the Claudia Circle development is above the EIR.

Compared to 2004 income data, average income in the Pear Orchard & Bowman Hicks developments increased, and average income in the Claudia Circle development decreased. This finding suggests there is more income mixing among the developments. Average income remains higher in Claudia Circle because there are fewer unit turnarounds at this location. 6% (3 of 49) of admissions were in Claudia Circle.

Although Claudia Circle is categorized as a “higher income development”, its average income is 31% below the AMI of \$41,100.00. Average income in Pear Orchard is below 22% of the AMI, and Bowman Hicks is below 19% of the AMI. Average income OHA-wide is below 22% of the AMI. The OHA proposes that HUD requirements for income mixing of its public housing tenants are not relevant due to the above findings.

Attachment B: FY 2006 Capital Fund Program Annual Statement

Annual Statement/Performance and Evaluation Report					
Comprehensive Grant Program (CGP) Part I: Summary					
HA Name Oakdale Housing Authority		Comprehensive Grant Number LA48P03350106		FFY of Grant Approval 2006	
<input type="checkbox"/> Original Annual Statement		<input type="checkbox"/> Reserve for Disasters/ Emergencies		<input checked="" type="checkbox"/> Revised Annual Statement / Revision Number <u>1</u>	
<input type="checkbox"/> Performance and Evaluation Report for Program Year 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-CGP Funds	\$10,000.00	\$0.00		
2	1406 Operations (may not exceed 10% of line 20)	\$6,500.00	\$6,257.00		
3	1408 Management Improvements				
4	1410 Administration	\$1,000.00	\$0.00		
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$25,000.00	\$0.00		
8	1440 Site Acquisition				
9	1450 Site Improvement	\$25,000.00	\$0.00		
10	1460 Dwelling Structures	\$302,000.00	204,000.00		
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Non-dwelling Structures				
13	1475 Non-dwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1498 Mod Used for Development				
19	1502 Contingency (may not exceed 8% of line 20)				
20	Amount of Annual Grant: (Sum of lines 2 – 19)	\$359,500.00	\$210,257.00		
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Section 504 Compliance				
23	Amount of line 20 Related to Security				
24	Amount of line 20 Related to Energy Conservation Measures				
Signature of Executive Director		Date	Signature of Public Housing Director		Date
<i>(original signed)</i>		06-15-2006			

Annual Statement/Performance and Evaluation Report									
Comprehensive Grant Program (CGP) Part II: Supporting Pages									
HA Name: Oakdale Housing Authority			Comprehensive Grant Number La48P03350106			FFY of Grant Approval 2006			
Development Number/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	Non-CFP Funds		1	\$10,000.00	\$0.00				
PHA Wide	Operating Fund	1406	1	\$6,500.00	\$6,257.00				
PHA Wide	Administration	1410	1	\$1,000.00	\$0.00				
PHA Wide	A/E fees and Costs	1430	1	\$25,000.00	\$0.00				
PHA Wide	Remove/replace 8" clay to 8" PVC lines and connect new service for units	1450	800 ft.	\$15,000.00	\$0.00				
PHA Wide	Construct concrete parking area	1450	1600 sq ft	\$10,000.00	\$0.00				
PHA Wide	Add new laundry/storage rooms	1460	12 units	\$108,000.00	\$0.00				
PHA Wide	Add central air conditioning/heating to units	1460	58 units	\$194,000.00	\$0.00				
PHA Wide	Add central air conditioning/heating to units	1460	68 units	\$0.00	\$204,000.00				
Signature of Executive Director				Date		Signature of Public Housing Director			Date
<i>(original signed)</i>				06-15-2006					

1A

Oakdale Housing Authority
Estimated PHAS score sheet
Based on the 6-30-06 Budget

	Low Rent	
	Estimated Score	Maximum Score
<i>Current Ratio</i>	8.09	9.00
<i>Number of Months Expendable fund Balance</i>	9.00	9.00
<i>Days Receivable Outstanding</i>	3.00	4.50
<i>Occupancy Loss</i>	3.00	4.50
<i>Expense Management/Utility Consumption</i>	0.00	1.50
<i>Net Income or Loss</i>	1.50	1.50
<i>Estimated Total</i>	24.59	30.00

Attachment C: FY 2006 Operating Budget

#5 Expense Management/Utility Consumption

Cakdale Housing Authority
9/30/2006

Low Rent

Administrative		Numerator - Administrative	
Line			
911	Administrative salaries	81,860	141,170
912	Auditing fees	4,900	
913	Outside management fees	0	
914	Compensated absences	6,000	
915	Employee benefit contributions-administrative	58 36,909	63,650
916	Other operating-administrative	25,260	
1105	Changes in compensated absence liability		
1107	Changes in unrecognized pension transition liability		
1108	Changes in special term/severance benefits liability		
		<u>154,929</u>	

Tenant Services		Numerator- Tenant Services	
Line			
921	Tenant services-salaries	0	
922	Relocation costs	0	
923	Employee benefit contribution-tenant services	0	
924	Tenant services-other	3,475	
		<u>3,475</u>	

Utilities		Numerator-Utilities	
Line			
931	Water	35,160	
932	Electricity	4,520	
933	Gas	1,090	
934	Fuel	0	
935	Labor	0	
937	Employee benefit contributions-utilities	0	
938	Other utilities expense	650	
		<u>41,620</u>	

Ordinary Maintenance		Numerator-Ordinary Maintenance	
Line			
941	Ordinary maintenance and operation-labor	59,310	
942	Ordinary maintenance and operation-materials & other	36,300	
943	Ordinary maintenance and operations-contract costs	62,800	
945	Employee benefit contributions-ordinary maintenance	42 26,741	
971	Extraordinary maintenance	0	
		<u>185,151</u>	

Protective Services		Numerator-Protective Services	
Line			
951	Protective services-labor	0	
952	Protective services-other contract costs	0	
953	Protective services-other contract costs	0	
955	Employee benefit contributions-protective services	0	
		<u>0</u>	

General Expense		Numerator-General Expenses	
Line			
961	Insurance premiums	48,050	
962	Other general expenses	0	
963	Payments in lieu of taxes	15,980	
964	Bad debt-tenant rents	0	
965	Bad debt-mortgages	0	
966	Bad debt-other	0	
967	Interest expense	0	
968	Severance expense	0	
975	Fraud losses	0	
977	Debt principal payment-governmental funds	0	
978	Dwelling units rent expense	0	
1102	Debt principal payments-enterprise funds	0	
1106	Changes in contingent liability balance	0	
1109	Changes in allowance for doubtful accounts-dwelling rents	0	
1110	Changes in allowance for doubtful accounts-other	0	
		<u>64,030</u>	

Multiply each expense category by the weights shown in the table:

	Low Rent Expense	Weight	Weighted Expense	Unit mos Available
Administrative	154,929	0.34	\$2676	1872
Tenant Services	3,475	0.10	348	1872
Utilities	41,620	0.03	1249	1872
Ordinary Maintenance	185,151	0.10	18515	1872
Protective services	0	0.10	0	1872
General expenses	64,030	0.33	21130	1872
Total	449,205	1.00	93,918	

449,205
449,205
Add the resulting weighted expenses (numerator) 93,918

Line	
1121 units leased	1718

Divide the total weighted expenses by the total low rent units months leased (denominator)

Per unit month expense \$55
maximum for PHA area 51.91

Score = 1.5 Score = 0

Note:
Expenses should be monitored closely to keep them below the budget and receive a passing score in this indicator.

Attachment C: FY 2006 Operating Budget

Operating Budget

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

OMB Approval No. 2577-0026 (exp. 6/30/2001)

See page four for instructions and the Public report burden statement

a. Type of Submission <input checked="" type="checkbox"/> Original <input type="checkbox"/> Revision	b. Fiscal Year Ending 9/30/2006	c. No. of months <input checked="" type="checkbox"/> 12 months <input type="checkbox"/> Other	d. Type of HUD assisted projects 01 <input checked="" type="checkbox"/> PHA/IHA Owned Rental Housing 02 <input type="checkbox"/> IHA Owned Mutual Help Homeownership 03 <input type="checkbox"/> PHA/IHA Leased Rental Housing 04 <input type="checkbox"/> PHA/IHA Owned Turnkey III Homeownership 05 <input type="checkbox"/> PHA/IHA Leased Homeownership
e. Name of Public Housing Agency/Indian Housing Authority (PHA/IHA) Oakdale Housing Authority			Complete Operating Budget Submitted to HUD <input checked="" type="checkbox"/> Subsidy calculations only submitted to HUD. completed 4/14/2005
P.O. Box BQ Oakdale, LA 71463		h. PAS/LOCCS Project No. LA033001,002,003,006	i. HUD Field Office New Orleans, Louisiana
g. ACC Number FW-719	j. No. of Dwelling Units 156		DUNS Number 08-772-0074
k. No. of Units Months 1872		m. No. Of Projects 4	LA033001 06 S

Line No.	Acct. No.	Description (1)	Actuals Last Fiscal Year	[X] Estimates [] or Actual Current Budget Year	REQUESTED BUDGET ESTIMATES				
					PHA/IHA Estimates		HUD Modifications		
					2004 PUM (2)	2005 PUM (3)	2006 PUM (4)	AMOUNT (TO NEAREST \$10) (5)	PUM (6)
Homebuyers Monthly Payments for:									
010	7710	Operating expense					0.00		
020	7712	Earned Home Payments					0.00		
030	7714	Nonroutine Maintenance Reserve					0.00		
040	Total	Break-Even Amount (sum of lines 010,020,and 030)	0.00	0.00	0.00		0		
050	7716	Excess/Deficit in Break-Even					0.00		
060	7790	Homebuyer Monthly Payment - Contra.					0.00		
Operating Receipts									
070	3110	Dwelling Rental	107.55	116.11	107.59		201,400		
080	3120	Excess Utilities					0.00		
090	3190	Nondwelling Rental					0.00		0
100	Total	Rental Income (lines 070, 080, and 090)	107.55	116.11	107.59		201,400		
110	3610	Interest On General Fund Investment	3.74	4.54	3.74		7,000		
120	3690	Other Income	11.45	5.93	5.93		11,100		
130	Total	Operating Income (sum of lines 100,110,and 120)	122.74	126.58	117.25		219,500		
Operating Expenditures-Administration									
140	4110	Administrative Salaries & All Annual Leave	42.88	42.04	43.73		81,860		
	4120	Yearly accrued leave	2.87	4.01	3.21		6,000		
150	4130	Legal Expense	0.11	0.16	0.00		0		
160	4140	Staff Training	0.37	0.75	0.75		1,400		
170	4150	Travel	0.70	0.93	0.75		1,400		
180	4170	Accounting Fees	1.81	2.46	2.46		4,610		
190	4171	Auditing Fees	2.67	2.14	2.62		4,900		
200	4190	Other Administrative Expense	8.97	6.77	9.54		17,850		
	4195	Outside Management Fees			0.00				
210	Total	Administrative Expense (sum of lines 140 thru line 200)	60.38	59.26	63.04		118,020		
Tenant Services:									
220	4210	Salaries			0.00		0		
230	4220	Recreation, Publication and Other Services			0.00		0		
240	4230	Contract Costs, Training and Other			0.00		0		
	4290	Resident Participation			1.94		3,475		
250	Total	Tenant Services Expense (sum if lines 220,230, and 240)	0.00		1.94	1.86	3,475		
Utilities:									
260	4310	Water	17.23	12.52	18.78		35,160		
270	4320	Electricity	2.41	2.05	2.41		4,520		
280	4330	Gas	0.58	0.37	0.58		1,090		
290	4340	Fuel			0.00				
300	4350	Labor			0.00				
310	4390	Other Utilities Expense	0.09		0.45		850		
320	Total	Utilities Expense (sum of line 260 thru line 310)	20.31	14.94	22.23		41,620		

Previous editions are obsolete

Attachment C: FY 2006 Operating Budget

Name of PHA/IHA		Fiscal Year Ending								
Oakdale Housing Authority		9/30/2006								
Line No.	Acct. No.	Description	Actuals	[X] Estimates	Requested Budget Estimates					
			Last Fiscal Yr.	[] or Actual	Current Budget Year		PHA/IHA Estimates		HUD Modifications	
			2004	2005	2006	AMOUNT	AMOUNT	AMOUNT	AMOUNT	
			PUM	PUM	PUM	TO NEAREST \$10	PUM	(TO NEAREST \$10)		
			(2)	(3)	(4)	(5)	(6)	(7)		
Ordinary Maintenance and Operation:										
330	4410	Labor	29.94	30.47	31.68	59,310				
340	4420	Materials	12.90	19.39	19.39	36,300				
350	4430	Contract Costs	30.58	21.15	32.05	60,000				
	4431	Garbage and Trash Removal	1.00	1.07	1.50	2,800				
360		Total Ordinary Maintenance & Operation Expense (lines 330 to 350)	74.42	72.08	84.62	158,410				
Protective Services:										
370	4460	Labor			0.00	0				
380	4470	Materials			0.00	0				
390	4480	Contract Costs	1.60		0.00	0				
400		Total Protective Services Expense (sum of lines 370 to 390)	1.60	0.00	0.00	0				
General Expenses:										
410	4510	Insurance	25.48	35.38	25.67	48,050				
420	4520	Payments in Lieu of Taxes	8.72	10.12	8.54	15,980				
430	4530	Terminal Leave Payments			0.00	0				
440	4540	Employee Benefit Contributions	28.23	32.99	34.00	63,850				
450	4570	Collection Losses	3.10		0.00	0				
460	4590	Other General Expense			0.00	0				
470		Total General Expense (sum of lines 410 to 460)	65.53	78.49	68.21	127,880				
480		Total Routine Expense (sum of lines 210,250,320,360,400, and 470)	222.24	226.71	239.96	449,205				
Rent for Leased Dwellings:										
490	4710	Rents to Leased Dwelling Owners	0.00	0.00	0.00	0				
500		Total Operating Expense (sum of lines 480 and 490)	222.24	226.71	239.96	449,205				
Nonroutine Expenditures:										
510	4610	Extraordinary Maintenance	12.34		0.00	0				
520	7520	Replacement of Nonexpendable Equipment			0.00	0				
530	7540	Property Betterments and Additions	67.57		0.00	0				
540		Total Nonroutine Expenditures (sum of lines 510,520, and 530)	79.91	0.00	0.00	0				
550		Total Operating Expenditures (sum of lines 500 and 540)	302.15	226.71	239.96	449,205				
Prior Year Adjustments:										
560	6010	Prior Year Adjustments Affecting Residual Receipts			0.00	0				
Other Expenditures:										
570		Deficiency in Residual Receipts at End of Preceding Fiscal Yr.	0.00	0.00	0.00	0				
580		Total Operating Expenditures, including prior year adjustments and other expenditures (line 550 plus or minus line 560 plus line 570)	302.15	226.71	239.96	449,205				
590		Residual Receipts (or Deficit) before HUD Contributions and provision for operating reserve (line 130 minus line 580)	-179.41	-100.13	-122.71	-229,705				
HUD Contributions:										
600	8010	Basic Annual Contribution Earned-Leased Projects-Current Year	0.00	0.00	0.00	0				
610	8011	Prior Year Adjustments - (Debit) Credit			0.00					
620		Total Basic Annual Contribution (line 600 plus or minus line 610)	0.00	0.00	0.00	0				
630	8020	Contributions Earned - Op. Sub: - Cur. Yr. (before year-end adj)	127.45	141.56	156.13	292,273				
640	8021	Mandatory PFS Adjustments (net)			0.00	0				
650		Other estimated 5%			-7.81	-14,614				
660		Other (Specify)			0.00	0				
670		Total Year-end Adjustments/Other (plus or minus lines 640 thru 660)	0.00	0.00	-7.81	-14,614				
680	8020	Total Operating Subsidy -current year (line 630 plus or minus line 670)	127.45	141.56	148.32	277,659				
690		Total HUD Contributions	127.45	141.56	148.32	277,659				
700		Residual Receipts (or Deficit) (sum of line 590 plus line 690)								
7010		Enter here and on line 810	-51.96	41.43	25.62	47,954				

Attachment C: FY 2006 Operating Budget

5

Name of PHA/IHA Oakdale Housing Authority		Fiscal Year Ending 9/30/2006	
Operating Reserve		PHA/IHA Estimates	HUD Modifications
740	2821	Part I-Maximum Operating Reserve-End of Current Budget Year PHA / IHA-Leased Housing-Section 23 or 10c 50% of Line 480, column 5 form HUD-52564	
		224,603	

PART II - PROVISION FOR AND ESTIMATED OR ACTUAL OPERATING RESERVES AT FISCAL YEAR END			
780		Operating Reserve at End of Previous Fiscal Year - Actual for FYE (date): 2004	340,003.30
790		Provision for Operating Reserve - Current Budget Year (Check one) [X] Estimated for FYE [] Actual for FYE 2005	-18,003.60
800		Operating Reserve at End of Current Budget Year (Check one) [X] Estimated for FYE [] Actual for FYE 2005	321,999.70
810		Provision for Operating Reserve - Requested Budget Year Estimated for FYE Enter Amount from Line 700 2006	47,954.49
820		Operating Reserve at End of Requested Budget Year Estimated for FYE (Sum of lines 800 and 810) 2006	369,954.19
830		Cash Reserve Requirement - % of line 480 Reserve Percentage	165%

Comments:

PHA/IHA Approval: Name Remie Vidrine
 Title Executive Director
 Signature  Date 5-2-05

Field Office Approval: Name _____
 Title _____
 Signature _____ Date _____

Attachment C: FY 2006 Operating Budget

CALCULATIONS FOR CURRENT YEAR PROVISIONS

Oakdale Housing Authority
 Estimated for year 9/30/2006

Income		88,409.00	
Current Month 1 thru		5	
X 12		12	
Total Estimated Income Before Subsidy			212,181.60
Income for Capital Fund (CFP) (1406)			6,153.00
Budget 8020			280,509.00
Total Estimated Income			478,843.60
Total Routine Expenditures	ctual audit,4530,4570	186,894.00	
Less accrued Insurance & PILOT for 6 months		19,886.00	
		167,008.00	
Current Month 1 thru		5	
X 12		12	
Total Estimated Routine Expenditures			400,819.20
Budget insurance	4510		66,230.00
Estimated 12 months PILOT	4520		15,294.00
Budgeted Yearly Accrued Leave	4120		7,500.00
Actual audit	4171		6,830.00
Actual terminal leave	4530		
Actual collection loss	4570		-706.00
Budgeted extraordinary maintenance	4610		
Budgeted replacement of equipment	7520		
Budgeted betterments and additions	7540		880.00
Misc	4620		
	4590		
Total estimated Expenses			496,847.20
Estimated Provision for reserves for Current Year			-18,003.60

Attachment C: FY 2006 Operating Budget

Operating Budget
Schedule of All Positions and Salaries

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

OMB Approval No. 2577-0026 (Exp. 10/31/95)

Name of Housing Authority: **Oakdale Housing Authority** Locality: **P.O. Box BQ
Oakdale, LA 71463** Fiscal Year Ending: **9/30/2006**

Position Title and Name By Organizational Unit and Function	Present Salary Rate As of 9/30/2005	Requested Budget Year Estimated Payment		Allocation of Salaries by Program											
		Salary Rate	No. Months	Amount	Management	S/8	Capital Fund	Other FMHA	Other	Longevity	Method of Allocation				
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)				
Administration															
Executive Director-Remie Vidrine	4,559.00	4,741.33	12	56,896	56,896	100	0	0	0	0	0	0	0	0	
Assistant Director-Tina Johnson	2,487.75	2,612.08	12	31,345	3,135	10	28,211	90	0	0	0	0	0	0	
Project Manager I-Rosalind Carey	1,778.00	1,777.42	5	8,887	8,887	100	0	0	0	0	0	0	0	0	
		1,848.52	7	12,940	12,940	100	0	0	0	0	0	0	0	0	
Total Administrative Salaries				110,068	81,857	74	28,211	26	0	0	0	0	0	0	
Tenant Services															
Maintenance															
Maintenance Repairman II-Gerald Johnson	1,976.00	1,975.73	5	9,879	9,879	100	0	0	0	0	0	0	0	0	
		2,054.76	7	14,383	14,383	100	0	0	0	0	0	0	0	0	
Maintenance Repairman I-Aubrey Ceaser	1,659.00	1,659.00	1	1,659	1,659	100	0	0	0	0	0	0	0	0	
		1,724.79	11	18,973	18,973	100	0	0	0	0	0	0	0	0	
Laborer-Word Williams	1,174.00	1,173.55	5	5,868	5,868	100	0	0	0	0	0	0	0	0	
		1,220.49	7	8,543	8,543	100	0	0	0	0	0	0	0	0	
Total Maintenance Salaries				59,305	59,305	100	0	0	0	0	0	0	0	0	
Total				169,373	141,162	83	28,211	17	0	0	0	0	0	0	

To the best of my knowledge all the information stated herein, as well as any information provided in the accompaniment herein, is true and accurate. Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012, 31 U.S.C. 3)

Executive Director or Designated Official
[Signature]

Date
5-2-05

This certifies that all positions as identified, do not exceed 100% of any individual employees time.
form HUD-52566(3/95)
ref. Handbook 7475.1

Attachment C: FY 2006 Operating Budget

Specify all proposed new positions and all present positions to be abolished in the Requested Budget Year. Cite prior HUD concurrence in proposed staffing changes or present justification for such changes. Cite prior HUD concurrence in proposed salary increases for Administration Staff or give justification and pertinent comparability information. Cite effective date for current approved wage rates (form HUD-52158) and justify all deviations from these rates.

See HUD-52566 Schedule of All Positions and Salaries

Travel, Publications, Membership Dues and Fees, Telephone and Telegraph, and Sundry: In addition to "Justification for Travel to Conventions and Meetings" shown on form HUD-52571, give an explanation of substantial Requested Budget Year estimated increases over the PUM rate of expenditures for these accounts in the Current Budget Year. Explain basis for allocation of each element of these expenses.

See HUD-52571 Administrative Expenses Other Than Salaries

	Accounting breakdown Low Rent	Section 8
accounting	3,860	4,500
budget	300	
revision	100	
FDS submission	250	250
FDS submission Capital Funds	100	
	4,610	4,750

Utilities: Give an explanation of substantial Requested Budget Year estimated increases over the PUM rate of expenditures for each utility service in the Current Year. Describe and state estimated cost of each element of "Other Utilities Expense."

Water	35,160
Electricity	4,520
Gas	1,090
Sewer	850
Other	0
	41,620

Ordinary Maintenance & Operation - Materials: Give an explanation of substantial Requested Budget Year estimated increases over the PUM rate of expenditures for materials in the Current Year.

misc material	36,300	
Total	36,300	\$ 1,000 Capitalization policy

Ordinary Maintenance & Operation - Contract Costs: List each ordinary maintenance and operation service contracted for and give the estimated cost for each. Cite and justify new contract services proposed for the Requested Budget Year. Explain substantial Requested Budget Year increases over PUM rate of expenditure for Contract Services in the Current Budget Year. If LHA has contract for maintenance of elevator cabs, give contract cost per

Garbage collections	2,800	A/C & heating repairs	5,000
Plumbing	6,000	Janitorial	_____
Carpentry	3,000	Catholic protection	_____
Yard mowing	8,000	Pipe line survey	_____
Pest control	5,000	fire extinguishers	_____
Equipment repairs	2,500	uniforms	_____
Interior painting	8,000	misc	19,500
Electrical repairs	3,000		_____
Total		\$	62,800

Attachment C: FY 2006 Operating Budget

Insurance: Give an explanation of substantial Requested Budget Year estimated increases in PUM rate for insurance over the Current Budget Year.

Cite changes in coverage, premium rates, etc.

	Total	L/R	%	S/8	%	Other	%
F & EC	22,000	22,000	100	0		0	
OL & T/Liability	5,000	5,000	100	0	0	0	0
Auto	9,500	6,650	70	2,850	30	0	0
Workman's Comp	14,000	11,670	83	2,330	17	0	0
Bond	2,000	1,400	70	600	30	0	0
Officer's Liability	1,400	980	70	420	30	0	0
Flood		0	70		30		0
LHC fee	500	350	70	150	30	0	0
Total	54,400	48,050		6,350		0	

Employee Benefit Contributions: List all Employee Benefit plans participated in. Give justification for all plans to be instituted in the Requested Year for which prior HUD concurrence has not been given.

				83	17	0
				L/R	S8	other
Total Salaries	169,373					
(1) FICA	169,373 X	0.0765 =	12,957	10,800	2,160	0
(2) Hospitalization	3,025 X	12 =	36,300	30,250	6,050	0
(3) Retirement	169,373 X	0.14 =	23,712	19,770	3,950	0
(4) Unemployment	42,000 X	0.023 =	966	800	170	0
(5) Civil Service	83,543 X	0.00404 =	338	280	60	0
(6) Life	176 X	12 =	2,108	1,750	360	0
			76,381	63,650	12,750	0
(4) Unemployment	7,000 x 6					
(5) Civil Service	15,000 x 5 + 8,543					

Collection Loss: State the number of tenants accounts receivable to be written off and the number amount of all accounts receivable for both present and vacated tenants as of the month in which the estimate was computed.

\$ _____ 0

Extraordinary Maintenance, Replacement of Equipment, and Betterment and Additions: Cite prior HUD approval or give justification for each nonroutine work project included in the Requested Budget and for those for future years which make up the estimate on form HUD-52570. Justify information incorporated on or attached to form HUD-52567 need not be repeated here.

Contracts: List all contracts, other than those listed on page 3 under Ordinary Maintenance & Operations (OMO). Cite the name of the contractor, type of contract, cost of contract, and contract period. Justification must be provided for all contract services proposed for the Requested Budget Year (RBY). Explain substantial RBY increases over the PUM rate of expenditure for these contracts in the Current Budget Year.

Attachment C: FY 2006 Operating Budget

Oakdale Housing Authority

For FYE 9/30/2006

Required Operating Subsidy Submittals Enclosed

Calculation of Performance Funding System Operating Subsidy (PFS), Form HUD-52723 with signature of Executive Director

Supporting PFS Forms:

a. Calculation of Allowable Utilities Expense Level (AUEL), form HUD-52722-A

b. Supporting data for other costs (e.g., Add-Ons, Other Income, Family Self Sufficiency)

c. PHA Occupancy Percentage, form HUD-52728-A

Other Forms:

d. PHA Board Resolution approving Low-Rent Operating Budget and Calculation of Performance Funding System Operating Subsidy, Form HUD-52574

e. SF-424 Application for Federal Assistance

f. Certification of Payments to Influence Federal Transactions, HUD-50071

Attachment C: FY 2006 Operating Budget

**PHA/IHA Board Resolution Approving
Operating Budget or Calculation of
Performance Funding System
Operating Subsidy**

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

OMB Approval No. 2577-0000

Public Reporting for this collection of information is estimated to average 15 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Reports Management Officer, Office of Information Policies and Systems, U.S Department of Housing and Urban Development, Washington, D.C. 20410-3600 and to the Office of Management and Budget Paperwork Reduction Project (2577-0000), Washington, D.C. 20503.
Do not send this completed form to either of these address.

Acting on behalf of the Board of Commissioners of the below-named Public Housing Agency (PHA)/Indian Housing Housing (IHA), as its Chairman, I make the following certifications and agreements to the Department of Housing and Urban Development (HUD) regarding the board's approval of (check one or more as applicable):

	FYE: 9/30/2006	(date)
<input checked="" type="checkbox"/>	Operating Budget Submitted on :	_____
<input type="checkbox"/>	Operating Budget Revision Submitted on:	_____
<input checked="" type="checkbox"/>	Calculation of Performance Funding System Submitted on:	_____
<input type="checkbox"/>	Revised Calculation of Performance Funding System Submitted on:	_____

I certify on behalf of the : Oakdale Housing Authority THAT;

1. All regulatory and statutory requirements have been met;
2. The PHA has sufficient operating reserves to meet the working capital needs of its developments;
3. Proposed budget expenditures are necessary in the efficient and economical operation of the housing for the purpose of serving low-income residents;
4. The budget indicates a source of funds adequate to cover all proposed expenditures;
5. The calculation of eligibility for Federal funding is in accordance with the provisions of the regulations;
6. All proposed rental charges and expenditures will be consistent with provisions of law;
7. The PHA/IHA will comply with the wage requirements under 24 CFR 968.110(e) and (f) or 24 CFR 905.120(c) and (d);
8. The PHA/IHA will comply with the requirements for access to records and audits under 24 CFR 968.110(i) or 24 CFR 905.120(g);
9. The PHA/IHA will comply with the requirements for the reexamination for family income and composition under 24 CFR 960.209, 990.115 and 905.315; and
10. The PHA/IHA will comply with the requirements for the certification of Housing Manger and Assistant Housing Manager positions (24 CFR 967.304 and 967.305).

I hereby certify that all information stated within, as well as any other information provided in the accompaniment herewith, is true and accurate.
Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U S C 1001, 1010, 1012;31 USC 3729,3802)

Board Chairman's Name(type)

Janie McLain

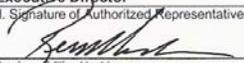
Signature:

Janie McLain

Date:

5-2-05

form HUD-52574 (08/31/94)

APPLICATION FOR FEDERAL ASSISTANCE		Version 7/03	
1. TYPE OF SUBMISSION Application <input type="checkbox"/> Construction <input checked="" type="checkbox"/> Non-Construction		2. DATE SUBMITTED	Applicant Identifier
Preapplication <input type="checkbox"/> Construction <input type="checkbox"/> Non-Construction		3. DATE RECEIVED BY STATE	State Application Identifier
		4. DATE RECEIVED BY FEDERAL AGENCY	Federal Identifier
5. APPLICANT INFORMATION			
Legal Name Oakdale Housing Authority		Organizational Unit: Department: Oakdale Housing Authority	
Organizational DUNS: 08-772-0074		Division:	
Address		Name and telephone number of person to be contacted on matters involving this application (give area code)	
P.O. Box BQ		Prefix:	First Name: Remie
Oakdale, LA 71463		Middle Name	
Parish-Allen		Last Name Vidrine	
6. EMPLOYER IDENTIFICATION NUMBER (EIN): 7 2 - 6 0 0 8 7 4 7		Suffix:	
		Email: tina@worldnetla.net	
		Phone Number (give area code) (318) 335-2417	Fax Number (give area code) (318) 335-9326
8. TYPE OF APPLICATION <input checked="" type="checkbox"/> New <input type="checkbox"/> Continuation <input type="checkbox"/> Revision If Revision, enter appropriate letter(s) in box(es) <input type="checkbox"/> <input type="checkbox"/> (See back of form for description of letters) Other (Specify)		7. TYPE OF APPLICANT: (enter appropriate letter in box) <input checked="" type="checkbox"/> G other (specify)	
10. CATALOG OF FEDERAL DOMESTIC ASSISTANCE NUMBER: 1 4 - 8 5 0 Title: Public and Indian Housing		9. NAME OF FEDERAL AGENCY: Department of Housing and Urban Development	
12. AREAS AFFECTED BY PROJECT (Cities, Counties, States, etc.): City		11. DESCRIPTIVE TITLE OF APPLICANT'S PROJECT: Operating subsidy eligibility for all projects currently listed on the Annual Contributions Contract between PHA and HUD	
13. PROPOSED PROJECT Start Date: 10-1-05 Ending Date: 9-30-06		14. CONGRESSIONAL DISTRICTS OF: a. Applicant: #4 Louisiana b. Project: same	
15. ESTIMATED FUNDING		16. IS APPLICATION SUBJECT TO REVIEW BY STATE EXECUTIVE ORDER 12372 PROCESS?	
a. Federal	\$ 292,273	a. YES. THIS PREAPPLICATION/APPLICATION WAS MADE AVAILABLE TO THE STATE EXECUTIVE ORDER 12371 PROCESS FOR REVIEW ON: DATE _____	
b. Applicant	\$	b. No. <input checked="" type="checkbox"/> PROGRAM IS NOT COVERED BY E. O. 12372	
c. State	\$	<input type="checkbox"/> OR PROGRAM HAS NOT BEEN SELECTED BY STATE FOR REVIEW	
d. Local	\$	17. IS THE APPLICANT DELINQUENT ON ANY FEDERAL DEBT? <input type="checkbox"/> Yes If "Yes", attach an explanation <input checked="" type="checkbox"/> No	
e. Other	\$		
f. Program Income	\$ 219,500		
g. TOTAL	\$ 511,773		
18. TO THE BEST OF MY KNOWLEDGE AND BELIEF, ALL DATA IN THIS APPLICATION/PREAPPLICATION ARE TRUE AND CORRECT, THE DOCUMENT HAS BEEN DULY AUTHORIZED BY THE GOVERNING BODY OF THE APPLICANT AND THE APPLICANT WILL COMPLY WITH THE ATTACHED ASSURANCES IF THE ASSISTANCE IS AWARDED.			
a. Authorized Representative			
Prefix:	First Name Remie	Middle Name	
Last Name Vidrine			Suffix
b. Title Executive Director			c. Telephone Number (give area code) (318) 335-2417
d. Signature of Authorized Representative 			e. Date Signed 5-2-05
Previous Edition Usable Authorized for Local Reproduction		Standard Form 424 (Rev. 9-2003) Prescribed by OMB Circular A-102	

**Certification of Payments
to Influence Federal Transactions**

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

Applicant Name

Oakdale Housing Authority

Program/Activity Receiving Federal Funding

PHA/IHA OWNED RENTAL HOUSING

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, Disclosure Form to Report Lobbying, in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U. S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each failure.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

Warning:

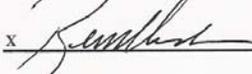
Name of Authorized Official:

Title:

Remie Vidrine

Executive Director

Signature:

X 

Date:

5-2-05

form HUD 50071 (3/98)

Previous edition is obsolete

ref. Handbooks 7417.0, 7475.13, 7485.1, & 7485.3

Attachment C: FY 2006 Operating Budget

Oakdale Housing Authority
FYE 9/30/2006

This is to certify that all positions as identified, do not exceed 100% of any individual employees time.



Executive Director

Attachment C: FY 2006 Operating Budget

Operating Fund
Calculation of Operating Subsidy
 PHA-Owned Rental Housing

Section 1					
a) Name and Address of Public Housing Agency Oakdale Housing Authority P.O. Box BQ Oakdale, LA 71463				b) Budget Submission to HUD Required Yes NO c) Type of Submission 4/14/2005 X Original Revision No.	
d) No. of HA units	e) Unit Months Available (UMAs)	f) Subject FYE	g) ACC Number	h) Operating Fund Project Number	i) DUNS Number
156	1872	9/30/2006	FW-719	LA033001,002,003,006	08-772-0074

Section 2					
Line No.	Description	Requested by PHA (PUM)	HUD Modifications (PUM)		
Part A. Allowable Expenses and Additions					
01	Previous allowable expense level (Part A, line 08 of form HUD-52723 for previous year)	235.06			
02	Part A, Line 01 multiplied by .005	1.18			
03	Delta from form HUD-52720-B, if applicable (see instructions)				
04	"Requested" year units from latest form HUD-52720A (see instructions)	156			
05	Add-ons to allowable expense level from previous fiscal year (see instructions)				
06	Total of Part A, Lines 01,02,03, and 05	236.24			
07	Inflation Factor	non metro	1.031		
08	Revised allowable expense level (AEL) (Part A, Line 06 times Line 07)		243.56		
09	Transition Funding				
10	Increase to AEL				
11	Allowable utilities expense level from form HUD-52722-A	41,617	22.23		
12	Actual PUM cost of Independent Audit (IA) (Through FYE 2004)	see remarks	4,781	2.55	
13	Costs Attributable to deprogrammed units				
14	Total Allowable Expenses and Additions (Sum of Part A, Lines 08 thru 13)		268.34		
Part B. Dwelling Rental Income					
01	Total rent roll as of 2/1/2005	\$ 16,626.00			
02	Number of occupied units as of rent roll date	139			
03	Average monthly dwelling rent charge per unit for current budget year (Part B, line 01 / Line 02)	2006	119.61		
04	Average monthly dwelling rent charge per unit for prior budget year	2005	117.19		
05	Average monthly dwelling rent charge per unit for budget year 2 years ago	2004	114.18		
06	Three-year average monthly dwelling rent charge per unit (part B, Line 03 + Line 04 + Line 05) / 3		116.99		
07	50/50 Income split (Part B, Line 03 + Line 06) / 2		118.30		
08	Average monthly dwelling rental charge per unit (lesser of Part B, Line 03 or Line 07)		118.30		
09	Rental income adjustment factor		1.03		
10	Projected average monthly dwelling rental charge per unit (Part B, Line 08 times Line 09)		121.85		
11	Projected occupancy percentage from form HUD-52728	%	97		
12	Projected average monthly dwelling rental charge per unit (Part B, Line 10 times Line 11)		118.19		
Part C. Nondwelling Income					
01	Other Income	-	0.00		
02	Total operating receipts (Part B, Line 12 plus Part C, Line 01)		118.19		
03	PUM deficit or (Income)(Part A, Line 14 minus Part C, Line 02)		150.15		
			Requested by PHA (Whole dollars)	HUD Modifications (Whole dollars)	
04	Deficit or (Income) before add-ons (Part C, Line 03 times Section 1, e)	1872	281,081		

Previous edition is obsolete for PHS Fiscal Year beginning 1/1/2004 and thereafter

Attachment C: FY 2006 Operating Budget

J6		Project Number: LA033001,002,003,006	
Line No.	Description	Requested by PHA (Whole Dollars)	HUD Modifications (Whole Dollars)
Part H. Calculation of Adjustments for Subject Fiscal Year			
This part is to be completed only after the subject fiscal year has ended			
01	Indicate the types of adjustments that have been reflected on this form: <input type="checkbox"/> Utility Adjustment <input type="checkbox"/> HUD discretionary adjustment (Specify under Section 3)		
02	Utility adjustment from form HUD-52722-B		
03	Deficit or (Income) after adjustments (Total of Part E, Line 01 and Part H, Line 02)		
04	Operating subsidy after adjustments (greater of Part E, Line 02 or Line 02 or Part H, Line 03)		
05	Part E, Line 03 of latest form HUD-52723 approved during subject FY (Do not use Part E, Line 03 of this revision)		
06	Net adjustments for subject fiscal year (Part H, Line 04 minus Part H, Line 05)		
07	Utility adjustment (enter same amount as Part H, Line 02)		
08	Total HUD discretionary adjustments (Part H, Line 06 minus Line 07)		
09	Unfunded portion of utility adjustment due to proration		
10	Unfunded portion of HUD discretionary adjustment due to proration		
11	Prorated utility adjustment (Part H, Line 07 plus Line 09)		
12	Prorated HUD discretionary adjustment (Part H, Line 08 plus Line 10)		
Section 3			
Remarks (provide part and line numbers)			
Part A Line 12			
2004 4,781			

4,781			
I hereby certify that all information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties (18 U S C 1001,1010,1012,31 U S C 37,293,802)			
Signature of Authorized HA Representative & Date:		Signature of Authorized Field Office Representative & Date:	
X  5-2-05			
Previous edition is obsolete for PHS Fiscal Year beginning 1/1/2004 and thereafter		Page 3	
		Form HUD-52723 (1/2001)	

Attachment C: FY 2006 Operating Budget

MIKE ESTES, P.C.
A PROFESSIONAL ACCOUNTING CORPORATION
4200 AIRPORT FREEWAY – SUITE 100
FORT WORTH, TEXAS 76117

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MEMBER AMERICAN
INSTITUTE OF CERTIFIED
PUBLIC ACCOUNTANTS

February 23, 2005

Mr. Remie Vidrine, E.D.
Oakdale Housing Authority
PO Drawer BQ
Oakdale, LA 71463

Client # 11193

Dear Mr. Vidrine:

For preparation of the audit for the 12 months ended September 30, 2004	\$	6,500.00
For preparation of the Louisiana Data Collection Form and e-mailing the report to the Louisiana State Auditor		30.00
For required electronic transmission of audited financial statements for the year ended September 30, 2004 required by REAC		<u>300.00</u>

\$ 6,830.00

Thank you.

L/R 4781.00
S/R 2049.00
6830.00

Attachment C: FY 2006 Operating Budget

Oakdale Housing Authority

H/A's Base Year

FICA Add-On for

9/30/2006

7475.13 REV 6-6

Data	PFS Base Year Rate	5.85%(1975)
	2005 Rate	7.65%
	PFS Base Year Base	14,100(1975)
	2005 Base	87,000

2006 Payroll Subject To FICA Using Base Year Base:	65,606
2006 Payroll Subject To FICA Using 2005 Base:	140,579

2005 Rate (7.65%) X 2006 Payroll Subject To FICA Using 2005 Base:	10,754
---	--------

Base Year Rate (5.85%) X 2006 Payroll Subject To FICA Using Base Year Base	3,838
--	-------

Total Add On (Enter On Line 25 Of Form HUD-52723)	6,917
--	-------

	Base Year Base	2005 Base
83	14,100	90,000
Executive Director-Remie Vidrine	14,100	56,896
Assistant Director-Tina Johnson	14,100	31,345
Project Manager I-Rosalind Carey	14,100	21,827
Maintenance Repairman II-Gerald Johnson	14,100	24,262
Maintenance Repairman I-Aubrey Ceaser	14,100	20,631
Laborer-Word Williams	8,543	14,411

	79,043	169,372
Low Rent portion of total salaries	0.83	0.83
	65,606	140,579

Unemployment add-on	Total Maximum Salaries	42,000
	rate	0.02
	Total Add-on	966
	Low Rent portion	800 rounded

Attachment C: FY 2006 Operating Budget

Calculation of Allowable Utilities Expense Level

PHA-Owned Rental Housing
Operating Fund

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

OMB Approval No. 2577-0029 (exp. 10/31/2001)

a. Public Housing Agency Oakdale Housing Authority	b) Operating Fund Project No. LA033001,002,003,006	c) New Project No.	d) Fiscal Year Ending 9/30/2006	e) Type of Submission <input checked="" type="checkbox"/> Original <input type="checkbox"/> Revision No.
			e) ACC Number FW-719	f) Energy Performance Contract <input type="checkbox"/> g) Utility Rate Incentive

Line No.	Description	Unit Months Available	Water Consumption	Electricity Consumption	Gas Consumption	Fuel (Specify type e.g., oil,coal,wood)		
						Sewer		
	(2)		(3)	(4)	(6)	(7)	(8)	(9)
01	Uma and actual consumption for old projects for 12 month period which ended 12 months before the Requested Budget Year. 2004	1872	flat rate	38,490	1,086.3			
02	Uma and actual consumption for old projects for 12 month period which ended 24 months before the Requested Budget Year. 2003	1872	flat rate	38,460	485.0			
03	Uma and actual consumption for old projects for 12 month period which ended 36 months before the Requested Budget Year. 2002	1872	flat rate	34,870	396.6			
04	Accumulated UMA and actual consumption of old projects (sum of lines 01,02,03).	5616	-	111,820	1,968			
05	Estimated Unit Months Available for old projects for Requested Budget Year.	1872						
06	Ratio of Unit Months Available for old projects (line 04 divided by line 05 of column 3)	3						
07	Estimated UMA and consumption for old projects for Requested Budget Year (Each figure on line 04 divided by line 06).	1872	-	37,273	656.0			
08	Estimated UMA and consumption for new projects.							
09	Total estimated UMA and consumption for old and new projects for Requested Budget Year (line 07 + line 08).	1872	-	37,273	656.0			
10	Estimated cost of consumption on line 09 for Requested Budget Year (Line 13 times Line 09).	Costs	35,157	4,520	1,090	850		
11	Total Estimated cost for Requested Budget Year (sum of all columns of line 10).	41,616.60						
12	Est. PUM cost of consumption for Requested Budget Year (Allowable Utilities Expense Level)(Line 11 divided by line 09, col. 3).	22.23						
13	Rate		2,929.75	0.1213	1.6616	71		
14	Unit of Consumption		flat rate	KWH	MCF'S	Average Monthly		

Previous editions are obsolete

form HUD-52722-A (10/20/01)

Attachment C: FY 2006 Operating Budget

HA Calculation of Occupancy Percentage for a Requested Budget Year (RBY)				U. S. Department of Housing and Urban Development Office of Public and Indian Housing			
PHA/HA-Owned Rental Housing Performance Funding System (PFS)				OMB Approval No. 2577-0066 (Exp. 9/30/2002)			
1a. Name of PHA/HA Oakdale Housing Authority			2a. Contact: (Person who can best answer questions about this submission) Remie Vidrine				
1b. Street Address: P.O. Box BQ			2b. Contacts Phone No: (include area code)				
1c. City: Oakdale, LA 71463		1d. State:	1e. Zip Code:				
3. RBY Beginning Date (m/day/yr) 10/1/2005	4. Type of Submission <input checked="" type="checkbox"/> Original <input type="checkbox"/> Revision No.	5. PAS/LOCCS Project No. LA033001,002,003,006		6. Report Date: (check one box) <input checked="" type="checkbox"/> Actual Day <input type="checkbox"/> Average for Actual Month		7. Data Source: <input checked="" type="checkbox"/> form HUD-51234 <input type="checkbox"/> Rent Roll <input type="checkbox"/> Records	
Part A. Actual Occupancy Data as of Report Date							
8. Units Occupied						143	
9. Units Available						156	
10. Actual Occupancy Percentage (Divide line 8 by line 9; multiply by 100 and round to nearest whole)						92 %	
11. If the HA-wide occupancy percentage shown on line 10 is 97% or greater and the HA believes that an average occupancy rate of at least 97% is sustainable for the RBY, then check the box below. You have completed the form and do not need to proceed further.							
Stop & Note	<input type="checkbox"/> High Occupancy HA: Occupancy Percentage is 97% or higher and is sustainable for the RBY		>	Use 97% as the Projected Occupancy Percentage on line 17 of form HUD-52723			
12. Units vacant as of Report Date (subtract line 8 from line 9 and enter result)						13	
13. If the result on line 12 is five or fewer vacant units and the HA believes that during the RBY: 1) the inventory (line 9) will not change; and, 2) the number of vacant units on line 12 will be vacant for the full RBY, then check the box below. You have completed the form and do not need to proceed further.							
Stop & Note	<input checked="" type="checkbox"/> High Occupancy HA with five or fewer vacant units		>	Use line 10 for the Projected Occupancy Percentage on line 17 of form HUD-52723			
Part B. Distribution of Actual Vacancies by Major Cause Given below are circumstances and actions recognized by HUD as possible causes of vacancies that are beyond the control of the HA to correct. If appropriate, please distribute the number of vacant units reported on line 12 among these causes. Attach sheet identified with HA name and address, the RBY beginning date, and ACC number. Use the sheet to describe, for each circumstance; when the circumstance occurred, the location of the units involved; why the circumstance is preventing the HA from occupying, selling, demolishing, rehabilitating, reconstructing, consolidating or modernizing the vacant units; and the likelihood that these circumstances will be mitigated or eliminated in the RBY.							
14. Units vacant because of litigation (e.g. units that are being held as part of court-ordered or HUD approved desegregation plan)							
15. Units vacant because of Federal, Tribal, or State laws of general applicability. (Note: do not include units vacant only because they do not meet minimum construction or habitability standards.)							
16. Units vacant due to changing market conditions							
17. Units vacant because of natural disaster							
18. Units vacant because of insufficient funding for otherwise approvable CIAP application							
19. RMC-managed units vacant because of failure of HA to fund approvable request for Federal modernization funding (This line for use only by RMC's)							
20. Units vacant because of casualty loss and need to settle insurance claims							
21. Total units vacant due to Circumstances Beyond the HA's control (Enter sum of lines 14-20)						0	
22. Units vacant after adjusting for circumstances beyond the HAs control (Subtract line 21 from line 12)						13	
23. If the result on line 22 is five or fewer vacant units and the HA believes that during the RBY: 1) the inventory (line 9) will not change; and, 2) the number of vacant units on both lines 21 and 22 will be vacant for the full RBY, then check the box below. You have completed the form and do not need to proceed further.							
Stop & Note	<input type="checkbox"/> High Occupancy HA with five or fewer vacant units after adjusting for vacancies beyond its control		>	Use line 10 for the Projected Occupancy Percentage on line 17 of form HUD-52723			
24. Vacancy Percentage after adjusting for beyond control circumstances (Divide line 22 by line 9, multiply by 100, and round to nearest whole)						8 %	
25. If the result on line 24 is 3% or less and the HA believes that during the RBY: 1) the inventory (line 9) will not change; and 2) the number of vacant units on lines 21 and 22 will be vacant for the full RBY, then check the box below. You have completed the form and do not need to proceed further.							
Stop & Note	<input type="checkbox"/> High Occupancy HA: 3% or less vacancy rate after adjustment for vacancies beyond control		>	Use line 10 for the Projected Occupancy Percentage on line 17 of form HUD-52723			
This form replaces forms HUD-52728-A thru C			Page 1 of 3		form HUD-52728 (2/2001)		

Attachment C: FY 2006 Operating Budget

Part C. Status of Units Undergoing Modernization as of Report Date _____ If changes occur after the Report Date but prior to submission of this form, the most current status will be shown.

26. Protected Units	Occupied Units	Vacant units
a: Number of units that are under modernization construction (Contract awarded or force account work started)		
b: Number of units not under construction contract but included in a HUD-approved modernization budget where the time period for placing the units under construction (two FFY's after FFY of approval) has not yet expired.		
27. Unprotected Units; Number of units included in a HUD-approved modernization budget where the time period for placing the units under construction (two FFY's after FFY of approval) has expired.		

Part D. Units Estimated to be Available for Occupancy During RBY	(a) No of units	(b) Avg. No of mos. in RBY	(c) no of Unit Mos. (a x b)
28. Units Available as of Report Date (Enter line 9)	156	12	1872
29. Additional Units Available During RBY because of Development/Acquisition of PFS-Eligible projects	+		
30. Units Unavailable During RBY because of Demolition/Disposition/Conversion Actions Approved by HUD	-		
31. Total (Add lines 28 and 29; subtract line 30)	156		1872

Part E. Units Estimated to be Occupied During RBY	(a) No of units	(b) Avg. No of mos. in RBY	(c) no of Unit Mos. (a x b)
32. Units Occupied as of Report Date (Enter line 8)	143	12	1716
33. Additional Units Occupied during RBY because of Development/Acquisition of PFS-Eligible Projects	+	12	0
34. Reoccupancy during RBY of Units Vacated for Circumstances Beyond The HA's Control	+	12	0
35. Reoccupancy during RBY of Vacant Units in a Funded Modernization Program	+	12	0
36. Occupied Units in Funded Modernization Program Being Vacated during RBY	-	12	0
37. Occupied Units Being Vacated during RBY because of Demolition/Disposition/Conversion Actions Approved by HUD. If there are occupied units that become vacant after the Report Date but before the start of the RBY because of circumstances and actions beyond the HA's control, place that number here () and include in total shown on 37. Attach separate sheet with same information requested in Part C.	-		
38. Total (Add lines 32-35; subtract lines 36 and 37)	143		1716

Part F. Occupancy Percentage During RBY	
39. Total Unit Months of Occupancy (Enter line 38c)	1716
40. Total Unit Months Available for Occupancy (Enter line 31c)	1872
41. Occupancy Percentage for RBY (Divide line 39 by line 40; multiply by 100 and round to nearest whole)	92 %
42. Average Number of Vacant Units During RBY (Subtract line 39 from line 40; divide results by 12 and round to nearest whole)	13

43. If the result on line 41 is 97% or higher or if the result on line 42 is five or less, then check the appropriate box below. You have completed the form and do not need to proceed further.

Stop & Note

- a. High Occupancy HA; Occupancy Percentage is 97% or higher for the RBY > Use 97% as the Projected Occupancy Percentage on line 17 of form HUD-52723
- b. High Occupancy HA with five or fewer vacant units > Use line 41 for the Projected Occupancy Percentage on line 17 of form HUD-52723

Part G. Vacancy Percentage for RBY Adjusted for Modernization	
44. Total Unit Months of Vacancy on RBY (Enter line 40 less line 39)	156
45. Total Units Months for Vacant Units in Funded Mod. and Under Construction or Funded for Construction (Sum the vacant units of lines 26a and b; multiply by 12)	0
46. If any of the vacant units on lines 26a or b will be reoccupied during the RBY, enter that number times the average number on months during the RBY these units will be reoccupied.	- 0
47. If any of the occupied units on lines 26a or b will be vacated during the RBY for mod. construction, enter that number times the average number of months during the RBY these units will be vacated.	+ 0
48. Total Units Months for Vacant Units in Funded Mod. and Under Construction or Funded For Construction in RBY (Add line 45; less ;line 46; plus line 47)	0
49. Total Unit Months of Vacancy in RBY Adjusted for Modernization (Enter line 44 less line 48)	156
50. Vacancy Percentage for RBY Adjusted for Modernization (Divide line 49 by line 40; multiply by 100; and round ton nearest whole)	8 %
51. Average Number of Vacant Units in RBY Adjusted for Modernization (Divide line 49 by 12; round to nearest whole)	13

52. If the result on line 50 is 3% or lower or if the result on line 51 is five or less, then check the appropriate box below. You have completed the form and do not need to proceed further.

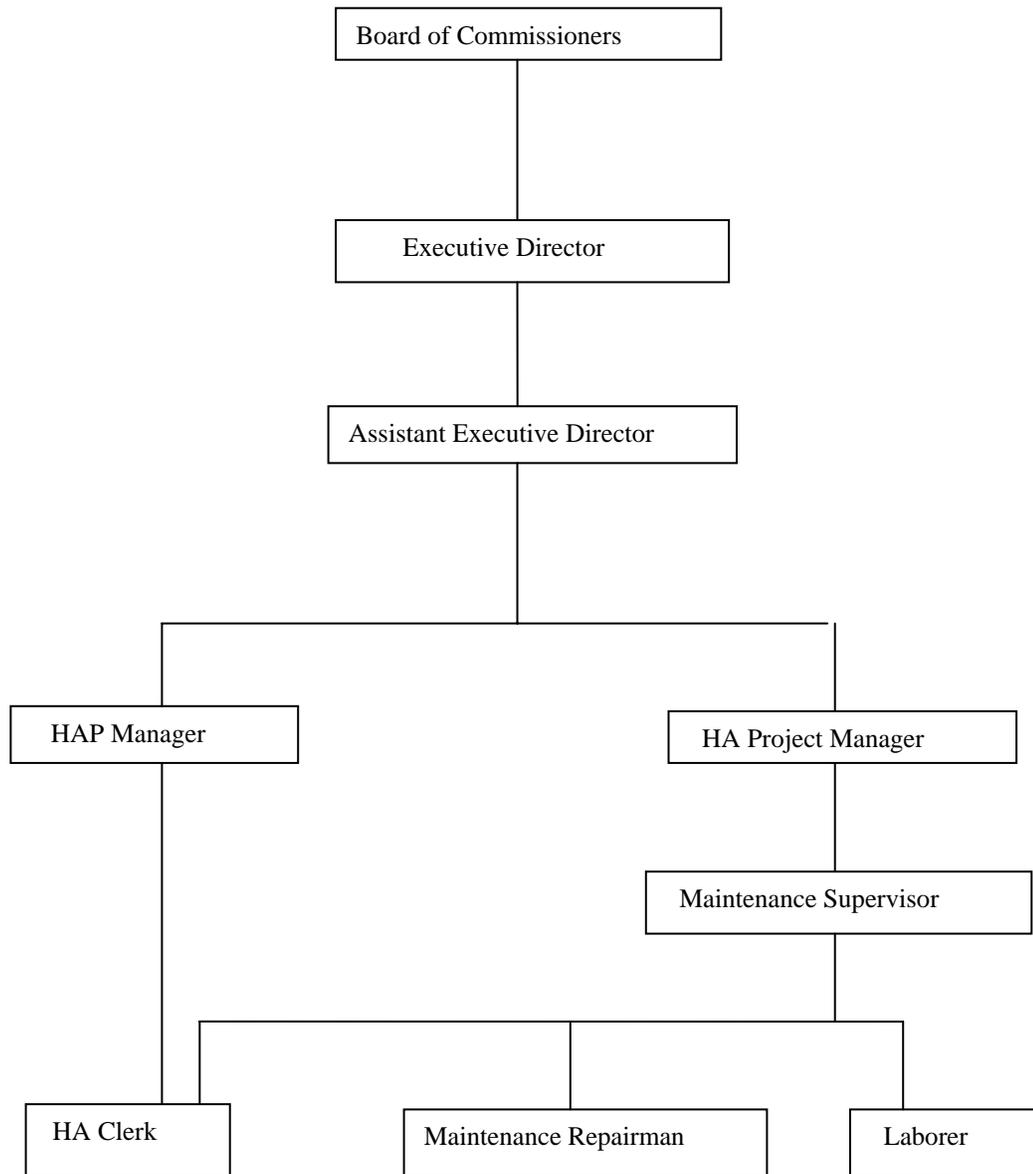
Stop & Note

- a. High Occupancy HA: Vacancy Percentage is 3% or less for the RBY after Modernization adjustment > Use line 41 as the Projected Occupancy Percentage on line 17 of form HUD-52723
- b. High Occupancy HA: five or fewer vacant units after Modernization adjustment > Use line 41 as the Projected Occupancy Percentage on line 17 of form HUD-52723

Attachment C: FY 2006 Operating Budget

Part H. Vacancy Percentage for RBY Adjusted for Both Modernization and Beyond Control Circumstances	
53. Total Unit Months of Vacancy in RBY (Enter line 44)	156
54. Total Unit Months of Vacancy on RBY Due to Modernization (Enter line 48)	0
55. Total Unit Months of Vacancy in RBY Due to Beyond Control Vacancies (Enter line 21 times 12; less any entry made on line 34c)	0
56. Total Unit Months of Vacancy After Above Adjustments (Enter line 53 less 54 and 55)	156
57. Vacancy Percentage for RBY After Above Adjustments (Divide line 56 by line 40; multiply by 100; and round to nearest whole)	8 %
58. Average Number of Vacant Units in RBY After Above Adjustments (Divide line 56 by 12; round to nearest whole)	13
59. If the result on line 57 is 3% or lower or if the result on line 58 is five or less, then check the appropriate box below. You have completed the form and do not need to proceed further.	
Stop & Note	
<input type="checkbox"/> a. High Occupancy HA: Vacancy Perce > less for the RBY after Modernization Adjustment	Use line 41 as the Projected Occupancy Percentage on line 17 of form HUD-52723
<input type="checkbox"/> b. High Occupancy HA: five or fewer va > units after Modernization Adjustment	Use line 41 as the Projected Occupancy Percentage on line 17 of form HUD-52723
Part I. Adjustment for Long Term Vac if the HA estimates that it will have a vacancy percentage of more than 3% for its RBY and more than five vacant units after adjusting for vacant units undergoing modernization and vacancies beyond its control, the HA will exclude all of its long-term vacancies (if any) from its count on units available for occupancy and use this section to determine its projected occupancy percentage.	
60. Total Long-Term Vacancies (Subtract vacant units shown on lines 21, 26a and b from line 12. Analyze remaining vacancies and identify those units that have been vacant for more than 12 months as the Report Date)	0
61. Total Months of Vacancy Associated With Long-Term Vacancies (Multiply by line 60 by 12)	
62. Total Unit Months Available for Occupancy in RBY Adjusted for Long-Term Vacancies (Subtract line 61 from line 31(c)) Use this UMA number in all other PFS calculations.	1872
63. Occupancy Percentage for RBY Adjusted for Long-Term Vacancies (Divide line 38(c) by line 62; multiply by 100 and round to nearest whole)	92 %
64. Average Number of Vacant Units in RBY after All Adjustments (Subtract line 60 from line 58)	13
65. Total Unit Months of Vacancy in RBY after All Adjustments (Subtract line 61 from line 56)	156
66. Vacancy Percentage for RBY Adjusted for Long-Term Vacancies (Divide line 65 by line 62; multiply by 100 and round to nearest whole)	8 %
67. If the result on line 63 is 97% or higher or if the result on line 64 is five or less or if the result on line 66 is 3% or less, then check the appropriate box below. You have completed the form and do not need to proceed further.	
Stop & Note	
<input type="checkbox"/> a. High Occupancy HA: Occupancy Per > is 97% or higher for the RBY after Long-Term Vacancies Adjustment	Use 97% as the Projected Occupancy Percentage on line 17 of form HUD-5 Use the UMA result on line 62 in calculating PFS eligibility.
<input type="checkbox"/> b. High Occupancy HA: Five or fewer v > units after Adjustment for Long-Term Vacancies	Use line 63 as the Projected Occupancy Percentage on line 17 of form HUD-5 Use the UMA result on line 62 in calculating PFS eligibility.
<input type="checkbox"/> c. High Occupancy HA: Vacancy Percentage is 3% or lower for the RBY after Long > Term Vacancies Adjustment	Use line 63 as the Projected Occupancy Percentage on line 17 of form HUD-5 Use the UMA result on line 62 in calculating PFS eligibility.
Part J. Projected Occupancy Percentages for Low Occ If the HA cannot determine an acceptable Projected Occupancy Percentage for the RBY using the above approach, it will use this section. The HA will use the lower of either 97% or that percentage based on having five units vacant for RBY. Either percentage can be adjusted for vacant units undergoing modernization construction and vacancies beyond its control. Small Has of 140 units or less will generally want to use a percentage based on five vacant units.	
68. Enter 97% if HA has more than 140 units. If 140 or fewer units, determine occupancy percentage based on 5 vacant units, for RBY. (Take 60 unit months and divide by line 62; multiply by 100 and round to nearest whole. Subtract result from 100%)	0 %
69. Percentage Adjustment for Modernization and Beyond Control Vacancies (Add lines 48 plus 55; divide that sum by line 62; multiply by 100 and round to nearest whole)	0 %
70. Projected Occupancy Percentage for Low Occupancy HA (Take the percentage on line 68 and subtract the percentage shown on line 69. Use the result as the Projected Occupancy Percentage on line 17 of form HUD-5 Use the UMA result on line 62 in calculating PFS eligibility)	0 %

Attachment D: OHA Management Organizational Chart



Attachment E: Capital Fund Program 5 Year Action Plan

Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2007 PHA FY: 2007	Work Statement for Year 3 FFY Grant: 2008 PHA FY: 2008	Original 5-Year Plan Revised 06-01-2006	
				Work Statement for Year 4 FFY Grant: 2009 PHA FY: 2009	Work Statement for Year 5 FFY Grant: 2010 PHA FY: 2010
	Annual Statement				
PHA Wide		\$305,000.00	\$337,900.00	\$286,900.00	\$307,900.00
CFP Funds Listed for 5-year planning	\$210,257.00	\$305,000.00	\$337,900.00	\$286,900.00	\$307,900.00
Replacement Housing Factor Funds					

Attachment E: Capital Fund Program 5 Year Action Plan

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year : 2 FFY Grant: 2007 PHA FY: 2007			Activities for Year: 3 FFY Grant: 2008 PHA FY: 2008		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
Annual Statement	PHA Wide	Operating Fund	\$25,000.00	PHA Wide	Operating Fund	\$26,500.00
	PHA Wide	Administration	\$4,000.00	PHA Wide	Administration	\$4,000.00
	PHA Wide	A/E Fees and costs	\$19,000.00	PHA Wide	A/E Fees and costs	\$25,000.00
	PHA Wide	Site Improvement: landscaping and parking	\$20,000.00	PHA Wide	Concrete walk repair, landscaping, and additional parking	\$35,000.00
	PHA Wide	Install air conditioning/heat in 1-story, 3-bedroom units @ \$3,000.00/unit	\$24,000.00	PHA Wide	Roof replacement: 30 bldgs. @ \$2,500.00	\$75,000.00
	LA033-1	Install central air conditioning/heat in 1-story, 3-bedroom units: 10 units @ \$3,000.00	\$30,000.00	PHA Wide	Replace exterior window screens: 20 units	\$11,900.00
	LA033-1 and LA033-2	Install central air conditioning/heat in 1-story, 3-bedroom units: 12 units @ \$3,000.00	\$36,000.00	PHA Wide	Remove/replace floors: 20 units	\$26,000.00
	PHA Wide	Install central air conditioning/heat in 1-story, 3-bedroom units: 4 units @ \$3,000.00	\$12,000.00	PHA Wide	Kitchens: 20 units	\$50,000.00

Attachment E: Capital Fund Program 5 Year Action Plan

	PHA Wide	Install central air conditioning/heat in 1-story, 4-bedroom units: 6 units @ \$3,000.00	\$18,000.00	PHA Wide	Sheetrock repairs: 20 units	\$15,000.00
	PHA Wide	Install central air conditioning/heat in 1-story, 4-bedroom units: 4 units @ \$3,000.00	\$12,000.00	PHA Wide	Interior doors: 20 units	\$8,000.00
	PHA Wide	Install central air conditioning/heat in 1-story, 1-bedroom units: 9 units @ \$3,000.00	\$27,000.00	PHA Wide	Refurbish bathrooms: 20 units	\$19,000.00
	PHA Wide	Install central air conditioning/heat in 1-story, 1-bedroom units: 12 units @ \$3,000.00	\$36,000.00	PHA Wide	Replace hot water heaters: 20 units	\$5,000.00
	PHA Wide	Purchase stoves & refrigerators : 20 units	\$12,000.00	PHA Wide	Purchase new ranges & refrigerators: 25 units	\$17,500.00
	PHA Wide	Purchase new truck	\$20,000.00	PHA Wide	Purchase new truck	\$20,000.00
	PHA Wide	Replace electrical circuit boards: 2 lift stations	\$10,000.00			
	Total CFP Estimated Cost		\$305,000.00	Total CFP Estimated Cost		\$337,900.00

Attachment E: Capital Fund Program 5 Year Action Plan

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year : 4 FFY Grant: 2009 PHA FY: 2009			Activities for Year: 5 FFY Grant: 2010 PHA FY: 2010		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
PHA Wide	Operating Fund	\$19,000.00	PHA Wide	Operating Fund	\$25,000.00
PHA Wide	Purchase 2 computers	\$7,000.00	PHA Wide	Administration	\$1,000.00
PHA Wide	A/E Fees and costs	\$24,000.00	PHA Wide	A/E Fees and costs	\$25,000.00
PHA Wide	Concrete walk repair, additional parking	\$20,000.00	PHA Wide	Concrete walk repair, additional parking	\$35,000.00
PHA Wide	Replace exterior window screens: 20 units	\$11,900.00	PHA Wide	Replace exterior window screens: 20 units	\$11,900.00
PHA Wide	Roof replacement: 25 bldgs. @ \$2,200.00	\$55,000.00	PHA Wide	Roof replacement: 16 bldgs. @ \$2,500.00	\$40,000.00
PHA Wide	Remove/replace floors: 20 units	\$26,000.00	PHA Wide	Remove/replace floors: 20 units	\$26,000.00
PHA Wide	Kitchens: 20 units	\$50,000.00	PHA Wide	Kitchens: 20 units	\$50,000.00
PHA Wide	Sheetrock repairs: 20 units	\$15,000.00	PHA Wide	Sheetrock repairs: 20 units	\$15,000.00
PHA Wide	Interior doors: 20 units	\$8,000.00	PHA Wide	Interior doors: 20 units	\$8,000.00
PHA Wide	Refurbish bathrooms: 20 units	\$19,000.00	PHA Wide	Refurbish bathrooms: 20 units	\$19,000.00
PHA Wide	Replace hot water heaters: 20 units	\$5,000.00	PHA Wide	Replace hot water heaters: 20 units	\$5,000.00
				Replace lighting with florescent per Energy Audit: 156 units	\$12,000.00
PHA Wide	Purchase new ranges & refrigerators: 20 units	\$12,000.00	PHA Wide	Purchase new ranges & refrigerators: 20 units	\$15,000.00
PHA Wide	Purchase new truck	\$15,000.00	PHA Wide	Purchase new truck	\$20,000.00
Total CFP Estimated Cost		\$286,900.00	Total CFP Estimated Cost		\$307,900.00

Attachment F: Comments Received – Resident Advisory Board Membership

Comments received: **None**

Member	PHA Development
Genora Laird	Pear Orchard
Jennifer Talbot	Pear Orchard
Jasper Green	Bowman Hicks
Laura Kirklin	Bowman Hicks
Delores Gautreaux	Claudia Circle
Willie Remo	Claudia Circle

Annual Statement/Performance and Evaluation Report Comprehensive Grant Program (CGP) Part I: Summary					
HA Name Oakdale Housing Authority		Comprehensive Grant Number LA48P03350104			FFY of Grant Approval 2004
<input type="checkbox"/> Original Annual Statement		<input type="checkbox"/> Reserve for Disasters/ Emergencies		<input type="checkbox"/> Revised Annual Statement / Revision Number _____	
<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending: 03-31-06		<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-CGP Funds				
2	1406 Operations (may not exceed 10% of line 20)				
3	1408 Management Improvements	\$6,153.00		\$6,153.00	\$6,153.00
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$21,000.00		\$21,000.00	\$21,000.00
8	1440 Site Acquisition				
9	1450 Site Improvement	\$28,000.00		\$28,000.00	\$28,000.00
10	1460 Dwelling Structures	\$210,000.00		\$210,000.00	\$210,000.00
11	1465.1 Dwelling Equipment—Nonexpendable	\$12,000.00		\$12,000.00	\$12,000.00
12	1470 Non-dwelling Structures				
13	1475 Non-dwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1498 Mod Used for Development				
19	1502 Contingency (may not exceed 8% of line 20)				
20	Amount of Annual Grant: (Sum of lines 2 – 19)	\$277,153.00		\$277,153.00	\$277,153.00
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Section 504 Compliance				
23	Amount of line 20 Related to Security				
24	Amount of line 20 Related to Energy Conservation Measures				
Signature of Executive Director		Date		Signature of Public Housing Director	
				Date	

Annual Statement/Performance and Evaluation Report Comprehensive Grant Program (CGP) Part II: Supporting Pages									
HA Name: Oakdale Housing Authority			Comprehensive Grant Number La48P03350104				FFY of Grant Approval 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	Operating Fund	1406	1	\$6,153.00		\$6,153.00	\$6,153.00	Complete	
PHA Wide	Fees and Costs	1430	1	\$21,000.00		\$21,000.00	\$21,000.00	Complete	
LA033-3, Site B	Concrete walk repair, landscaping, and additional parking	1450	1	\$28,000.00		\$28,000.00	\$28,000.00	Complete	
LA033-3, Site A	Construct laundry/storage rooms	1460	12 units	\$90,000.00		\$90,000.00	\$90,000.00	Complete	
LA033-3, Site B	Construct laundry/storage rooms	1460	16 units	120,000.00		120,000.00	120,000.00	Complete	
PHA Wide	Purchase new ranges & refrigerators	1465.1	20 units	\$12,000.00		\$12,000.00	\$12,000.00	Complete	
Signature of Executive Director				Date		Signature of Public Housing Director			

Annual Statement/Performance and Evaluation Report									
Comprehensive Grant Program (CGP) Part III: Implementation Schedule									
HA Name: Oakdale Housing Authority			Comprehensive Grant Number LA48P03350104			FFY of Grant Approval 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			
PHA Wide	09-30-2006			09-30-2008					
Signature of Executive Director				Date		Signature of Public Housing Director		Date	

Annual Statement/Performance and Evaluation Report Comprehensive Grant Program (CGP) Part I: Summary					
HA Name Oakdale Housing Authority		Comprehensive Grant Number LA48P03350105			FFY of Grant Approval 2005
<input type="checkbox"/> Original Annual Statement		<input type="checkbox"/> Reserve for Disasters/ Emergencies		<input type="checkbox"/> Revised Annual Statement / Revision Number _____	
<input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending: 03-31-06		<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-CGP Funds				
2	1406 Operations (may not exceed 10% of line 20)				
3	1408 Management Improvements	\$20,000.00		\$20,000.00	\$3,675.00
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$2,000.00		\$2,000.00	0.00
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	\$173,239.00		\$173,239.00	105,687.00
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Non-dwelling Structures				
13	1475 Non-dwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1498 Mod Used for Development				
19	1502 Contingency (may not exceed 8% of line 20)	\$29,000.00		\$29,000.00	\$6,690.89
20	Amount of Annual Grant: (Sum of lines 2 – 19)	\$224,239.00		\$224,239.00	\$116,052.89
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Section 504 Compliance				
23	Amount of line 20 Related to Security				
24	Amount of line 20 Related to Energy Conservation Measures				
Signature of Executive Director		Date		Signature of Public Housing Director	
				Date	

Annual Statement/Performance and Evaluation Report									
Comprehensive Grant Program (CGP) Part II: Supporting Pages									
HA Name: Oakdale Housing Authority			Comprehensive Grant Number La48P03350105				FFY of Grant Approval 2005		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.		Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
					Original	Revised	Funds Obligated	Funds Expended	
PHA Wide	Installation of surveillance cameras	1408		1	\$20,000.00		\$20,000.00	\$3,675.00	In progress
PHA Wide	Fees and Costs	1430		1	\$2,000.00		\$2,000.00	\$0.00	Pending
PHA Wide	Install central air conditioning / heating	1460		70 units	\$173,239.00		\$173,239.00	\$105,687.00	In progress
PHA Wide	Contingency	1502		1	\$29,000.00		\$29,000.00	\$6,690.89	in progress
Signature of Executive Director					Signature of Public Housing Director				
Date					Date				

Annual Statement/Performance and Evaluation Report Comprehensive Grant Program (CGP) Part III: Implementation Schedule							
HA Name: Oakdale Housing Authority			Comprehensive Grant Number LA48P03350105			FFY of Grant Approval 2005	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PHA Wide	09-30-2007			09-30-2009			
Signature of Executive Director _____				Signature of Public Housing Director _____			
Date _____				Date _____			

Attachment H: Progress Meeting Mission and Goals, 2005-2009

Progress in meeting the OHA's 2005-2009 Mission and Goals is provided below as statements that assess achievement of each goal. SEMAP and PHAS indicator scores are for FY 2004.

A. Mission

The Oakdale Housing Authority is a small agency that is committed to the provision of quality affordable housing, economic opportunity, and a safe living environment for extremely low, very low, and low income families in compliance with all Civil Rights requirements and will affirmatively further fair housing. *(The Oakdale Housing Authority continues to direct its efforts to achieve its Mission.)*

B. Goals

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

PHA Goal: Expand the supply of assisted housing

Objectives:

- Apply for additional rental vouchers:
- X Reduce public housing vacancies: *(MASS score 29)*
 - Leverage private or other public funds to create additional housing opportunities:
 - Acquire or build units or developments
 - Other (list below)
- X Reduce turnover time for vacated public housing units *(MASS score 29)*
- X Reduce time to renovate public housing units *(FASS score 9)*

PHA Goal: Improve the quality of assisted housing

Objectives:

- X Improve public housing management: *(MASS score 29)*
- X Improve voucher management: *(SEMAP score 100)*
 - Increase customer satisfaction:
 - Concentrate on efforts to improve specific management functions: (list;e.g., public housing finance; voucher unit inspections)
- X Renovate or modernize public housing units: *(PASS: FY 2004 score 16)*
 - 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:
- X Conduct outreach efforts to potential voucher landlords *(SEMAP score 100)*
 - 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)
- X Adopt payment standards that will increase housing options & ensure success among assisted families *(SEMAP score - 100)*

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

Attachment H: Progress Meeting Mission and Goals, 2005-2009

PHA Goal: Provide an improved living environment

Objectives:

- X Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments: (deconcentration of poverty achieved as reflected in annual analysis of tenant incomes)
- X Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments (income mixing achieved as reflected in annual analysis of tenant incomes)
- X Implement public housing security improvements: (RASS score 9)
Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
Other: (list below)
- X Maintain public housing units in compliance with standards that meet or exceed HUD's Uniform Physical Condition Standards (PASS score 16, OHA has made changes in its Maintenance staff and has strengthened its inspection procedures)
- X Employ admission preferences aimed at specific groups {elderly, families with disabilities}: (MTCS reports)

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 recipient's employability:
Provide or attract supportive services to increase independence for the elderly or families with disabilities.
Other: (list below)
- X Implement policies pertaining to minimum rents, exemptions to the payment of minimum rent due financial hardship circumstances, flat/ceiling rents, resident choice of payment, and earned income disregards (assess upward mobility of assisted families)

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

PHA Goal: Ensure equal opportunity and affirmatively further fair housing

Objectives:

- X Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability: (goal met)
- X Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability: (goal met)
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)

OHA Goal: To improve and/or maintain financial stability

Objectives:

- Continue aggressive rent collections (FASS score 9)
- Improve reserve position (FASS score 9)

OHA Goal: To promote a safe living environment

- Implement an effective screening strategy regarding background checks of applicants to public housing and Section 8 program for drug-related or criminal activities (RASS score 9)
- Continue stringent "One Strike" policies regarding drug-related or criminal activities of

Attachment H: Progress Meeting Mission and Goals, 2005-2009

public housing and Section 8 residents (RASS score 9)

Coordinate routine police patrol of public housing properties with local law enforcement agencies (RASS score 9)

OHA Goal: To address the housing needs of the community through collaboration with affected groups and other interested citizens of the community

Objectives:

Provide timely response to resident requests for maintenance work (MASS score 29, RASS score 9)

Afford residents and other citizens the opportunity to become more involved in management and other activities of the OHA (resident newsletters)

Encourage resident involvement and participation in the development of the OHA Agency Plan (Resident Advisory Board meetings, public hearing to receive comment on the Draft Plan)

Take action, in accordance with HUD regulations, to afford a resident the opportunity to serve on the OHA Board of Commissioners (resident board member or justification of exception to HUD resident board member requirement)

Enter into collaborative agreements with the Allen Parish Office of Family Services, the Allen Parish Sheriff's Office, and the Oakdale Police Department to better serve the needs and concerns of public housing residents and assisted Section 8 families (RASS score 9, documentation of cooperative agreements available)

Attachment I: Criteria for Substantial Deviation and Significant Amendment

1. Amendment and Deviation Definitions

a. Substantial Deviation from the 5-Year Plan

The definition of a “substantial deviation” from the OHA’s 5-Year Plan is one that requires a “significant amendment” due to any activity that does not support the OHA’s endeavors to accomplish its mission and to meet the goals and objectives specified in the Plan. Any deviation that is the result of circumstances beyond the control of the OHA due to changes in social, political, or economic conditions are excluded in this definition.

b. Significant Amendment or Modification to the Annual Plan

A “significant amendment” to the OHA’s 5-Year and/or its Annual Plan is one that substantially alters the basic principles of the Plan. Any changes made as a result of new HUD regulations not in effect when the Plans were developed are excluded in this definition.

Attachment J: Community Service Requirement Policy

OAKDALE HOUSING AUTHORITY

COMMUNITY SERVICE REQUIREMENT POLICY

Pursuant to 24CFR Part 960, Subpart F, the Oakdale Housing Authority (OHA) has developed a policy to comply with HUD regulations regarding community service of public housing residents.

Each adult resident of the OHA must participate in eight hours of community service and/or economic self sufficiency activities per month unless they meet the criteria for exemption.

Criteria for exemption from community service and/or economic self sufficiency activities are as follows. Exemption for any family member who is:

1. 62 years of age or older.
2. Is blind or disabled and is unable to comply or is a primary caretaker of such an individual.
3. Any adult in a family receiving TANF or other state welfare assistance.
4. Any adult who meets a state welfare program's criterion for exception from work requirements.

The OHA will administer the community service requirement program.

Administrative steps to implement the community service requirement

1. Changes to lease and ACOP manual policies.
2. Written description of the requirements (ACOP manual)
3. Written notification to residents regarding requirements or exempt status of each adult family member
4. Employ the cooperative agreement with the Allen Parish Office of Family Services to assist OHA in verifying resident's status

Programmatic aspects of the requirements

1. Types of activities that fulfill community service obligations
 - neighborhood watch
 - volunteering at community service entities
 - supervision of child recreation activities
 - janitorial service for community service entities
 - litter patrol of OHA and other community facilities
2. Entities that offer residents opportunity to fulfill obligations
 - Local food bank
 - Allen Parish Health Unit
 - Oakdale Police Department
 - Oakdale City Hall

Attachment K: MOA Between Oakdale Housing Authority and HUD



U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
Office of Public Housing
New Orleans Field Office
500 Poydras Street, 9th Floor
New Orleans, LA 70130

MEMORANDUM OF AGREEMENT

This Agreement is made this ____day of _____, 2006, by and between the Housing Authority of Oakdale, State of Louisiana (PHA), and the Secretary of the United States Department of Housing and Urban Development (HUD) acting by and through the Director of Public Housing (New Orleans Field Office) pursuant to the requirements of Section 6 (j)(2)(B) of the United States Housing Act of 1937, 42 U.S.C. 1437 ("the Act"), in Public Housing Assessment System (PHAS); Final Rule, 65 Fed. Reg. 1712 (to be codified at 24 CFR Part 902). (Further references to this regulation will be to the codified section number)

WHEREAS, the PHA entered into a Low Rent Public Housing Annual Contribution Contract ("ACC") Number FW 719 pursuant to the authority of the United States Housing Act of 1937, 42 U.S.C. 1437 on April 8., 1964, as subsequently amended, with HUD. As a result, HUD provides funding to the PHA.

WHEREAS, under the authority of 6(j) of the Act, the PHA was evaluated in accordance with the provisions of PHAS as codified at 24 CFR Part 902, received a score of less than 60% in a PHAS indicator as required thereunder, and was designated as "Substandard Physical"

WHEREAS, under the requirements of 24 CFR Section 902.75, those housing authorities which are designated as troubled must enter into a binding contractual agreement designated as a Memorandum of Agreement (MOA) with HUD for the purpose of improving the PHAS score to 60% or above as required by 24 CFR Part 902.

WHEREAS, the Act and related regulations require the PHA MOA to include the following:

- a. Baseline data, which could be raw data.
- b. Performance targets for such periods specified by HUD;
- c. Strategies to be used by the PHA in achieving the performance targets within the time period of the MOA;
- d. Technical assistance to the PHA provided or facilitated by HUD;
- e. The PHA's commitment to take all actions within its control to achieve the targets;
- f. Incentives for meeting such targets
- g. The consequences of failing to meet the targets; and,
- h. A description of the involvement of local public and private entities including PHA resident leaders in carrying out the agreement and rectifying the PHA's problems.

Attachment K: MOA Between Oakdale Housing Authority and HUD

Failure by the PHA to achieve the performance targets under this Memorandum of Agreement (MOA) may result in HUD's imposition of such sanctions as: the imposition of budget and management controls by HUD; or declaration of substantial default and subsequent actions, including referral to the Department Enforcement Center (DEC) for judicial appointment of a receiver, limited denial of participation, suspension, debarment, or other actions deemed appropriate by the DEC.

This MOA does not supersede, modify or amend the ACC or in any way excuse the PHA from complying fully with its obligations under the ACC. HUD does not waive its rights under the ACC. The PHA's satisfaction of, or failure to meet, the goals set forth in this MOA does not limit, modify or preclude HUD's right to take any remedial action allowed by the ACC or any provision of the Act or the related regulations.

Under 24 CFR Section 902.75(c)(8), the PHA has the primary responsibility for and has obtained the active local public and private entity participation, including the involvement of public housing resident leaders, in assisting the PHA's efforts to improve.

HUD has consulted with the assessment team that has provided recommendations for management improvements necessary to eliminate or substantially remedy existing deficiencies.

The parties agree that this Memorandum of Agreement (MOA) is a binding contractual agreement between the PHA and HUD.

1. This agreement shall consist of:
 - a. This Part A, Terms and Conditions;
 - b. Part B, Performance Targets and Strategies, which sets out the:
 - 1) Baseline Data
 - 2) Strategies to be used by the PHA in achieving the performance targets within the time period of the MOA;
 - 3) Target dates for completion of strategies; and,
 - 4) Technical assistance to the PHA provided or facilitated by HUD;
 - 5) The description of the involvement of local public and private entities, including PHA resident leaders in carrying out the agreement and rectifying the PHA's problem in accordance with the requirements of 24 CFR Section 902.75(b)(8).
2. The PHA agrees that the performance targets, strategies, and time frames specified in this MOA are reasonable and that it will take all actions within its control to complete them as set out in this Agreement.
3. HUD agrees to provide technical assistance as stated in Part B to the Authority and,

Attachment K: MOA Between Oakdale Housing Authority and HUD

based upon the compliance with the MOA, give the PHA appropriate consideration for discretionary or competitive funding resources, as those resources are available to HUD.

4. The Executive Director of the PHA shall provide to the HUD staff (as designated in Part B), a monthly written progress report based upon that month's scheduled targets and strategies as set out in Part B. This report shall be furnished no later than the 15th of the succeeding month and shall identify the accomplishment and/or failure of each task/goal to be completed that month. Failure to provide the written progress reports shall constitute a substantial default under this MOA. The Executive Director shall also complete quarterly and annual reports as required by Part B.
5. Subsequently, the designated HUD staff shall provide a response, no later than the 1st of the succeeding month after receipt of the monthly written report provided, to the Executive Director of the PHA that identifies the current accomplishments/shortfalls for the month. The HUD response will be based upon that month's PHA progress report and supporting documents. The Executive Director shall include the report on the agenda for discussion or action for the immediately upcoming monthly PHA Board Meeting.
6. HUD shall have the primary responsibility for validating the accuracy of the scheduled accomplishments as well as the quality of the work performed by the PHA.
7. Incentives for successfully meeting the performance targets include:
 - a. The removal of troubled designation, overall or with respect to the Capital Funds Program (Section 9(d) of the Act);
 - b. A higher capacity rating for competitive grant programs as the PHA improves its performance under the MOA; and
 - c. *(deleted)* Departmental recognition for the most improved PHAs.
8. The following events or conditions shall constitute substantial default of this agreement:
 - a. The PHA is determined by HUD to be in violation of Federal statutes, including but not limited to the U.S. Housing Act of 1937 (42 U.S.C. 1437 et seq.), or in violation of regulations implementing such statutory requirements, whether or not such violations would constitute a substantial breach or default under provisions of the relevant ACC.
 - b. HUD determines that the PHA has failed to meet the terms of, or to make reasonable progress to execute or meet requirements included in this MOA.
 - c. The PHA does not show substantial improvement, as defined in 24 CFR

Attachment K: MOA Between Oakdale Housing Authority and HUD

Section 902.75(g);

d. HUD determines that the PHA is in default under the ACC, in accordance with its terms and conditions;

9. Failure by the PHA to achieve the performance targets under this Memorandum of Agreement (MOA) may result in HUD's imposition of such sanctions as the imposition of management budget controls by HUD, declaration of substantial default, and subsequent actions, including referral to the Department Enforcement Center (DEC) for judicial appointment of a receiver, limited denial of participation, suspension, debarment, or other actions deemed appropriate by the DEC.

10. In addition to those provisions listed elsewhere, the following shall also constitute a substantial default under this MOA:

- a. Material violation of a statutory or regulatory provision or program requirement applicable to a public agreement or transaction including applications for grant and financial assistance, or to the performance of requirements under a grant or assistance award.
- b. Any other cause of so serious or compelling a nature that it affects the present responsibility of the PHA.

11. This MOA does not supersede, modify or amend the ACC or in any way excuse the PHA from complying fully with its obligations under the ACC. HUD does not waive its rights under the ACC. The PHA's satisfaction of, or failure to meet, the goals set forth in this MOA does not limit, modify or preclude HUD's right to take any remedial action allowed by the ACC or any provision of the Act or regulations thereunder;

12. Notwithstanding anything to the contrary, upon the occurrence of events or conditions that constitute a substantial default by the PHA with respect to its obligations under the ACC and applicable regulations to which the PHA is subject or this MOA, HUD may, in its discretion:

- a. Solicit competitive proposals from other public housing agencies and private housing management agents (which may be selected by existing tenants through administrative procedures established by the Secretary) in the eventuality that these agents may be needed for managing all, or part, of the housing administered by a public housing agency;
- b. Petition for the appointment of a receiver (which may be another public housing agency or a private management corporation) of the public housing agency to any district court of the United States or to any Court of the State in which the real property of the public housing agency is situated, that is authorized to appoint a receiver for the purposes and having the powers prescribed in this subsection;

Attachment K: MOA Between Oakdale Housing Authority and HUD

- c. Require the agency to make other arrangements acceptable to the Secretary and in the best interests of the public housing residents for managing all, or part of, such housing; and
 - d. Take such other actions available to it under the terms of the ACC, Section 6 of the National Housing Act, Title 24 CFR Sections 902.75 through Section 902.83 and those listed in the Field Office Monitoring of Public Housing Agencies (PHAs) Handbook 7460.7 REV-2.
13. This MOA creates no third party benefits or right in any person or entity not a party to this Agreement.
14. The PHA covenants that it will operate in good faith and with due diligence to fulfill and complete the terms of this agreement. HUD shall have the right to declare a substantial default should the PHA cease to operate in good faith, act in any manner inconsistent with the terms of this Agreement, take any action that would undermine the MOA, or for any other cause that would impede or impact the PHA's ability to timely and truly complete the terms of this Agreement.
15. The PHA affirmatively states that it has complied with all State and Local requirements precedent to entering into this MOA, and that this is a legal and binding contract upon the PHA.

Attachment K: MOA Between Oakdale Housing Authority and HUD

This agreement shall be in full force and effect, binding the parties from **April 1, 2006 to March 31, 2007**. This document may be amended by a document signed by all parties to this original agreement.

Oakdale Housing Authority

Sign
By: **Jane McClain** Date
Chairperson

Sign
By: **Remie Vidrine** Date
Executive Director

U.S. Department of Housing and Urban Development

By: **Cheryl J. Williams**, Director Date
Office of Public Housing
New Orleans

**Memorandum of Agreement (MOA)
Part B
Performance Targets and Strategies**

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

PHA Name: Housing Authority of Oakdale

PHA FYE: September 30

Plan Term: April 1, 2006 – March 31, 2007

Operational Area: 1. GOVERNANCE

Targets and Strategies	Baseline as of: 9-30-04	Final Performance Target	Estimated Completion Date	Lead Staff for PHA and HUD
1.1 Monitor implementation of the MOA [Reference:24 CFR 902.73]		03/31/07	On-going	Remie Vidrine (Executive Director) and key staff
A. Develop a process for reviewing MOA process	Status as of: 06-30-06			Monthly review of applicable targets and strategies
B. Review monthly report to HUD	Status as of: 06-30-06			Prepared monthly, submitted to HUD on date specified
1.3 Develop a Continuation of Operations Plan for use in the event of a major natural or national disaster	Status as of: 06-30-06, completed	10/01/06	08/01/06	Remie Vidrine and key staff
A. Plan should be tested				
B. Inform employees, community leaders, and local government entities about the plan	Status as of: 06-30-06, completed			
C. Collaborate with local government to ensure that emergency plans are synchronized	Status as of: 06-30-06, completed			

Operational Area: 2. ORGANIZATION AND STAFFING

Targets and Strategies	Baseline as of: 9-30-04	Final Performance Target	Estimated Completion Date	Lead Staff for PHA and HUD
2.1 Review, Develop and Implement Position Descriptions and Staff Performance Standards		10/01/06	Closed by HUD: 6/21/06	Remie Vidrine
A. Develop position descriptions and performance standards; include physical requirements and develop descriptions for those missing.	06-30-06: Completed		Same as above	
B. Implement position descriptions and performance standards.	06-30-06: Completed		Same as above	
C. Obtain employee signature and place a copy in their personnel file.	06-30-06: Completed		Same as above	
D. Conduct evaluation of staff performance and document in accordance with Personnel Policy.	06-30-06: Completed		Same as above	
E. Evaluate existing staff performance standards and revises as necessary.	06-30-06: Completed		Same as above	

Operational Area: **3. FINANCE AND PROCUREMENT**

PHAS Performance Targets		Baseline as of: 9/30/2004	1 st qtr Performance Target	2 nd qtr Performance Target	3 rd qtr Performance Target	Final Performance Target
1	Current ratio	7.5	8.0	8.5	8.5	9.0
2	Expendable Fund Balance	8.9	9.0	9.0	9.0	9.0
3	Tenant Receivable/Outstanding	4.0	4.1	4.3	4.4	4.5
5	Expense Management/Utilities	.0	.5	1.0	1.5	1.5
6	Net Income/Loss Divided by the Expendable Fund Balance	1.5	1.5	1.5	1.5	1.5

Targets and Strategies	Baseline as of:	Final Performance Target	Estimated Completion Date	Lead staff for PHA and HUD
no tasks in this section.				

Operational Area: **4. HOUSING MANAGEMENT**

PHAS Performance Targets		Baseline as of: 09/30/04	1 st qtr Performance Target	2 nd qtr Performance Target	3 rd qtr Performance Target	Final Performance Target
Indicator #:	Name:					
2-4	Occupancy Loss	3.6	3.8	4.0	4.2	4.5
3-1	Vacant Unit Turnaround Time	4.43	4.63	4.83	5.03	5.22

Targets and Strategies	Baseline as of: 9/30/04	Final Performance Target	Estimated Completion Date	Lead Staff for PHA and HUD
4.1 Reduce vacant unit turnaround time.		10/31/06	Closed by HUD: 6/21/06	Remie Vidrine
A. Develop Vacancy and Unit Turnaround log to include as a minimum:	04-30-06 Completed		Same as above	
1) Date the unit becomes vacant			Same as above	
2) Date the unit is assigned to maintenance or deferred to modernization			Same as above	
3) Date completed by maintenance and returned to occupancy			Same as above	
4) Date Leased			Same as above	
5) Total number of turnaround days			Same as above	
6) Total number of maintenance days exempted for capital fund or other reasons			Same as above	
7) Average number of calendar days units were in down time			Same as above	
8) Average number of calendar days units were in lease up time			Same as above	
9) Average number of calendar days units were in lease up time			Same as above	
B. Complete all make-ready work within 21 days	04-30-06 Completed		Same as above	
C. Improve coordination between maintenance & management to:	04-30-06 Completed		Same as above	
1) Provide projected availability dates;			Same as above	

Targets and Strategies	Baseline as of: 9/30/04	Final Performance Target	Estimated Completion Date	Lead Staff for PHA and HUD
2) Schedule move-in inspection in a timely manner;			Same as above	
3) Prioritize vacant unit prep to ensure waiting list needs are met;			Same as above	
4) Notify applicants in a timely manner to minimize lease up time; and			Same as above	
5) Minimize down time by notifying maintenance of vacancies promptly.			Same as above	
G. Submit an updated Vacant Unit Turnaround Log to Board/HUD	04-30-06 completed	10/30/06	Same as above	

Operational Area: 5. PROPERTY MANAGEMENT

Operational Area: 5. PROPERTY MANAGEMENT

PHAS Performance Targets		Baseline as of: 9-30-04	1 st qtr Performance Target	2 nd qtr Performance Target	3 rd qtr Performance Target	Final Performance Target
1	Physical Conditions	16	20	24	28	30
3-3a	Emergency WOs	2.61	2.61	2.61	2.61	2.61
3-3b	Non-emergency WOs	2.61	2.61	2.61	2.61	2.61
3-4a	Unit Inspections	2.61	2.61	2.61	2.61	2.61
3-4b	System Inspections	2.61	2.61	2.61	2.61	2.61
Targets and Strategies		Baseline as of: 9/30/04	Final Performance Target	Estimated Completion Date	Lead staff for PHA and HUD	
5.1 Improve Physical Condition score		16	30	Closed by HUD: 6/21/06	Remie Vidrine and maint. staff	
A. Schedule a limited inspection of all developments to prepare for REAC inspection.				Same as above		
5.2 Ensure 100% of dwelling units are inspected annually using UPCS and/or more stringent local code.			03/31/07	Same as above	Remie Vidrine	
A. Ensure that quality control inspections are completed.				Same as above		
B. Ensure that work identified by the inspections are entered on the WO tracking log/system		Send W.O. log		Same as above		
C. Address REAC PHAS inspection deficiencies and report progress to Board/HUD		Send W.O. related to inspection deficiencies		Same as above		
D. Submit monthly report of progress to Board/HUD				Same as above		

/Operational Area: 6. RESIDENT SERVICES AND INITIATIVES

PHAS Performance Targets		Baseline as of: 09/30/2004	1 st qtr Performance Target	2 nd qtr Performance Target	3 rd qtr Performance Target	Final Performance Target
Indicator #:	Name:					
3-5	Economic self sufficiency	N/A				N/A
4	Resident satisfaction	9	9	10	10	10

Targets and Strategies	Baseline as of:	Final Performance Target	Estimated Completion Date	Lead staff for PHA and HUD
No tasks in this section.				

Operational Area: 7. CAPITAL FUNDS

PHAS Performance Targets		Baseline as of: 9-30-04	1 st qtr Performance Target	2 nd qtr Performance Target	3 rd qtr Performance Target	Final Performance Target
Indicator #:	Name:					
3-2a	Funds unexpended	Excluded	Excluded	Excluded	Excluded	Excluded
3-2b	Funds unobligated	3.04	3.04	3.04	3.04	3.04
3-2c	Quality of work	3.04	3.04	3.04	3.04	3.04
3-2d	Contract administration	1.52	1.52	1.52	1.52	1.52
3-2e	Budget controls	1.52	1.52	1.52	1.52	1.52

Targets and Strategies	Baseline as of: 9-30-04	Final Performance Target	Estimated Completion Date	Lead staff for PHA and HUD
7.1 Staff to attend Capital Fund training.	Attend CF training offered in Laf. 7/18/06		12/31/06	E.D. and key staff
7.2 Comply with Energy Audit Requirement [Reference: 24 CFR 965.302.			12/31/06	
A. Procure for and complete an Energy Audit in accordance with 24 CFR 965.302.	03-31-06 Completed		Closed by HUD: 6/21/06	
A. Incorporate results of the Energy Audit in the 5-Year Action Plan as part of the annual PHA plan	04-30-06 Completed		Closed by HUD: 6/21/06	

8. SECURITY

Operational Area:

PHAS Performance Targets		Baseline as of: 1/07/05	1st qtr Performance Target	2nd qtr Performance Target	3rd qtr Performance Target	Final Performance Target
3-6a	Reporting and tracking crime	1.74	1.74	1.74	1.74	1.74
3-6b	Applicant screening	1.74	1.74	1.74	1.74	1.74
3-6c	Lease enforcement	1.74	1.74	1.74	1.74	1.74
3-6d	Grant management	N/A	N/A	N/A	N/A	N/A

Targets and Strategies	Baseline as of:	Final Performance Target	Estimated Completion Date	Lead staff for PHA and HUD
No areas of improvement				

Operational Area:

9. MANAGEMENT INFORMATION SYSTEMS

Targets and Strategies	Baseline as of:	Final Performance Target	Estimated Completion Date	Lead staff for PHA and HUD
No areas of improvement				