OMB Approval No: 2577-0226
Expires: 08/31/2009

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

PHA Plans

5 Year Plan for Fiscal Years 2005 - 2009
Annual Plan for Fiscal Year 2007

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: Morgan County Housing Authority
PHA Number: IL79

PHA Fiscal Year Beginning: (mm/yyyy) July 1, 2007

PHA Programs Administered:

☒**Public Housing and Section 8** ☐**Section 8 Only** ☐**Public Housing Only**
Number of public housing units: 428 Number of S8 units: Number of public housing units:
Number of S8 units: 170

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

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

Public Access to Information

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

☒ Main administrative office of the PHA
☐ PHA development management offices
☐ PHA local offices

Display Locations For PHA Plans and Supporting Documents

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

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

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

☒ Main business office of the PHA

☐ PHA development management offices

☐ Other (list below)

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

B. Mission

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

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

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

B. Goals

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

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

☒ PHA Goal: Expand the supply of assisted housing
Objectives:
- ☐ Apply for additional rental vouchers:
- ☒ Reduce public housing vacancies:
- ☒ Leverage private or other public funds to create additional housing opportunities:
- ☐ Acquire or build units or developments
- ☒ Other (list below)

  - Revise Public Housing Admissions and Continued Occupancy Policy, HA Lease, and Section 8 Administrative Plan to address the needs of victims of domestic violence, dating violence, sexual assault, and stalking.

☒ PHA Goal: Improve the quality of assisted housing
Objectives:
- ☒ Improve public housing management: (PHAS score) 90% or above
- ☐ Improve voucher management: (SEMAP score)
- ☒ Increase customer satisfaction:

- ☐ Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections)
- ☒ Renovate or modernize public housing units:
- ☐ Demolish or dispose of obsolete public housing:
- ☐ Provide replacement public housing:
- ☐ Provide replacement vouchers:
- ☐ Other: (list below)

☒ PHA Goal: Increase assisted housing choices
Objectives:

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

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

☒ PHA Goal: Provide an improved living environment
Objectives:

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

  - The Morgan County Housing Authority will refine the Networking Agreement with the Crisis Center Foundation, a non-profit organization dedicated to providing services to victims of domestic violence and their children, to address the needs of victims of domestic violence, dating violence, sexual assault, and stalking.

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

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

Objectives:

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

  - Provide or attract supportive services that will address the needs of victims of domestic violence, dating violence, sexual assault, and stalking.

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

☒ PHA Goal: Ensure equal opportunity and affirmatively further fair housing

Objectives:

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

Other PHA Goals and Objectives: (list below)

Annual PHA Plan
PHA Fiscal Year 2007
[24 CFR Part 903.7]

i. Annual Plan Type:
Select which type of Annual Plan the PHA will submit.

☒ **Standard Plan**

☐ **Troubled Agency Plan**

ii. Executive Summary of the Annual PHA Plan
[24 CFR Part 903.7 9 ®]
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.

- **Included as an attachment (Executive Summary il079m07)**

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.

Table of Contents

Page #

Annual Plan
i. Executive Summary
ii. Table of Contents
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2. Financial Resources
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6. Grievance Procedures
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8. Demolition and Disposition
9. Designation of Housing
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11. Homeownership
12. Community Service Programs
13. Crime and Safety
14. Pets (Inactive for January 1 PHAs)
15. Civil Rights Certifications (included with PHA Plan Certifications)
16. Audit
17. Asset Management
18. Other Information

Attachments

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

Required Attachments:

- ☒ Admissions Policy for Deconcentration
- ☒ FY 2007 Capital Fund Program Annual Statement
- ☐ Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)
- ☒ List of Resident Advisory Board Members
- ☒ List of Resident Board Member
- ☒ Community Service Description of Implementation
- ☒ Information on Pet Policy
- ☒ Section 8 Homeownership Capacity Statement, if applicable
- ☒ Description of Homeownership Programs, if applicable

Optional Attachments:

- ☐ PHA Management Organizational Chart
- ☒ FY 2007 Capital Fund Program 5 Year Action Plan
- ☐ Public Housing Drug Elimination Program (PHDEP) Plan
- ☒ Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- ☒ Other (List below, providing each attachment name)

- P&E Report (il079a06)
- Executive Summary (il079m07)
- Progress Report (il079c07)
- 5-Year Plan (il079n07)
- CCSF Policy (il079g04)
- Deconcentration Policy (il079b02)
- Residents Comments (il079f06)
- Pet Policy (il079e02)
- RAB (il079d07)
- Carbon Monoxide (il079u07)
- Violence Against Women (il079w07)
- Section 8 Capacity Statement (il0798t01)
- Section 8 Homeownership Program (il079o01)

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**
✓	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
✓	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
✓	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
✓	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI))) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
✓	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
✓	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
✓	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
✓	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 Quality Housing and Work Responsibility Act Initial Guidance; Notice* and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
✓	Public housing rent determination policies, including the methodology for setting public housing flat rents ☒ check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
✓	Schedule of flat rents offered at each public housing development ☒ check here if included in the public housing A & O Policy	Annual Plan: Rent Determination

List of Supporting Documents Available for Review		
Applicable & On Display	**Supporting Document**	**Applicable Plan Component**
✓	Section 8 rent determination (payment standard) policies ☒ check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
✓	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
✓	Public housing grievance procedures ☒ check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
✓	Section 8 informal review and hearing procedures ☒ check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
✓	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
✓	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
	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
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
✓	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
✓	Policies governing any Section 8 Homeownership program ☒ check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
✓	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 (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
✓	The most recent fiscal year audit of the PHA conducted	Annual Plan: Annual Audit

List of Supporting Documents Available for Review		
Applicable & On Display	**Supporting Document**	**Applicable Plan Component**
	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	
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

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

Based upon the information contained in the Consolidated Plan/s applicable to the jurisdiction, and/or other data available to the PHA, provide a statement of the housing needs in the jurisdiction by completing the following table. In the "Overall" Needs column, provide the estimated number of renter families that have housing needs. For the remaining characteristics, rate the impact of that factor on the housing needs for each family type, from 1 to 5, with 1 being "no impact" and 5 being "severe impact." Use N/A to indicate that no information is available upon which the PHA can make this assessment.

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	64%	5	4	4	3	3	3
Income >30% but <=50% of AMI	42%	4	3	3	2	2	2
Income >50% but <80% of AMI	18%	3	2	2	1	1	1
Elderly	26%	4	2	2	1	1	1
Families with Disabilities	34%	4	3	2	3	1	3
White/Non Hispanic	28%	3	2	2	2	2	2
African American	27%	5	4	4	4	4	5
Hispanic	64%	5	4	4	4	4	5
Asian/Pacific	100%	4	3	3	3	3	3

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

☒ Consolidated Plan of the Jurisdiction/s
Indicate year: 2007
☒ U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") 2000 dataset for Morgan County.
☐ American Housing Survey data
Indicate year:
☒ Other housing market study
Indicate year: 2006
☒ Other sources: (list and indicate year of information)

- Section 8 & Public Housing Waiting Lists

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one) ☒ Section 8 tenant-based assistance ☐ Public Housing ☐ Combined Section 8 and Public Housing ☐ Public Housing Site-Based or sub-jurisdictional waiting list (optional) If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	250		83
Extremely low income <=30% AMI	188	75	
Very low income (>30% but <=50% AMI)	54	22	
Low income (>50% but <80% AMI)	8	3	
Families with children	201	80	
Elderly families	16	6	

Housing Needs of Families on the Waiting List			
Families with Disabilities	31	14	
White Non Hispanic	171	68	
African American	68	27	
Hispanic	4	2	
Other	7	3	
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			

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

If yes:

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

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

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

Housing Needs of Families on the Waiting List

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

	# of families	% of total families	Annual Turnover
Waiting list total	30		
Extremely low income <=30% AMI	20	66	
Very low income (>30% but <=50% AMI)	7	23	
Low income (>50% but <80% AMI)	3	10	
Families with children	14	46	
Elderly families	4	13	
Families with Disabilities	5	16	
White Non-Hispanic	25	83	
African American	5	16	
Hispanic			
Other			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	13	43	
2 BR	16	53	
3 BR	1	3	
4 BR			
5 BR			
5+ BR			

Is the waiting list closed (select one)? ☒ No ☐ Yes
If yes:
How long has it been closed (# of months)?
Does the PHA expect to reopen the list in the PHA Plan year? ☐ No ☐ Yes
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? ☐ No ☐ Yes

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.

- Maintain a 97% utilization rate.
- Apply for additional vouchers when available.
- Screen applicants and/or evict tenants for criminal activity.
- Decrease unit turn around time.
- Increase resident self-sufficiency by coordinating education and job training opportunities.
- Develop affordable multi-family housing.
- Implement Section 8 Voucher Homeownership Program.
- Perform needed maintenance and continue modernization of PHA property.

(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

- [x] Apply for additional section 8 units should they become available
- [ ] Leverage affordable housing resources in the community through the creation of mixed - finance housing
- [x] 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

- [x] Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing
- [x] 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
- [x] 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

- [x] Employ admissions preferences aimed at families who are working
- [x] 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
- [x] Apply for special-purpose vouchers targeted to the elderly, should they become available
- [ ] Other: (list below)

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:
Select all that apply

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

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)

- Section 8 & Public Housing Waiting Lists

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

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

Financial Resources: Planned Sources and Uses		
Sources	**Planned $**	**Planned Uses**
1. **Federal Grants (FY 2006 grants)**		
a) Public Housing Operating Fund	$608,240	
b) Public Housing Capital Fund	$638,551	
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	$564,312	
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)		

Financial Resources: Planned Sources and Uses		
Sources	**Planned $**	**Planned Uses**
3. Public Housing Dwelling Rental Income	$683,185	PHA Operations
4. Other income (list below)		
Non-dwelling Rent	$17,400	PHA Operations
Interest Income	$25,469	PHA Reserves
4. Non-federal sources (list below)		
Total resources	$2,537,157	

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)

- At initial application.

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

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

- Credit History
- Verification that the applicant can obtain electrical service (PHA Only).

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)

- Date & Time of Application
- Preference for applicants who live and/or work in the jurisdiction.

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)

- When a Tenant asks to move from the High Rise to the Cottages.
- When a Tenant asks to move from a small one bedroom to a large one bedroom apt.

☐ Other: (list below)

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

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

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

4. Relationship of preferences to income targeting requirements:

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

(5) Occupancy

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

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

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

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

(6) Deconcentration and Income Mixing

a. ☒ Yes ☐ No: 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:

☐ Employing new admission preferences at targeted developments
If selected, list targeted developments below:

☒ Other (list policies and developments targeted below)

- Additional affirmative marketing

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)

- Use of new appliance
- Resident will receive a payment for moving cost up to $100

- Housing Authority will pay a non-refundable Security Deposit

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:

- 79-3 Turner High Rise

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:

- 79-2 Beecher High Rise

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)

- Landlord References
- Personal References
- Credit Bureau Reports

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)

- Past & present landlord names & phone numbers when requested.

(2) Waiting List Organization

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

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

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

☒ PHA main administrative office
☐ Other (list below)

(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:

- If repairs to the home the family wants to rent require more time or the family is having difficulty locating a home to rent.

(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)

- ☐ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans' families

☒ Residents who live and/or work in your jurisdiction
☐ Those enrolled currently in educational, training, or upward mobility programs
☐ Households that contribute to meeting income goals (broad range of incomes)
☐ Households that contribute to meeting income requirements (targeting)
☐ Those previously enrolled in educational, training, or upward mobility programs
☐ Victims of reprisals or hate crimes
☐ Other preference(s) (list below)

4. Among applicants on the waiting list with equal preference status, how are applicants selected? (select one)
☒ Date and time of application
☐ Drawing (lottery) or other random choice technique

5. If the PHA plans to employ preferences for "residents who live and/or work in the jurisdiction" (select one)
☐ This preference has previously been reviewed and approved by HUD
☒ The PHA requests approval for this preference through this PHA Plan

6. Relationship of preferences to income targeting requirements: (select one)
☒ The PHA applies preferences within income tiers
☒ Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

(5) Special Purpose Section 8 Assistance Programs

a. In which documents or other reference materials are the policies governing eligibility, selection, and admissions to any special-purpose section 8 program administered by the PHA contained? (select all that apply)
☒ The Section 8 Administrative Plan
☒ Briefing sessions and written materials
☐ Other (list below)

b. How does the PHA announce the availability of any special-purpose section 8 programs to the public?
☒ Through published notices
☐ Other (list below)

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?

3. If yes to question 2, list these policies below**:**
   - **Elderly/Disabled**
   - **Zero Income**

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:

- $5.00 fixed rent for residents temporarily in a nursing home and all their income is going towards their nursing home care.

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 below100% of FMR
☒ 100% of FMR
☐ Above 100% but at or below 110% of FMR
☐ Above 110% of FMR (if HUD approved; describe circumstances below)

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

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

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

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

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

☒ Annually
☐ Other (list below)

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

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

(2) Minimum Rent

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

☐ $0
☐ $1-$25
☒ $26-$50

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

5. Operations and Management

[24 CFR Part 903.7 9 (e)]

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

A. PHA Management Structure

Describe the PHA's management structure and organization.

(select one)

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

- Executive Director
- Finance Director
- Maintenance Director
- Section 8 Occupancy Specialist
- Public Housing Occupancy Specialist
- Occupancy Clerk
- Receptionist/Secretary
- Social Service Coordinator

- Maintenance Supervisor

B. HUD Programs Under PHA Management

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

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing		
Section 8 Vouchers	159	60
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)		

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
- Blood Born Pathogens
- Capitalization
- Community Service & Self Sufficiency
- Community Space Rental
- Check Signing
- Criminal Records
- De-concentration

- Drug Free
- Enterprise Income Verification
- Equal Housing
- Grievance
- Hazardous Materials
- Investment
- Maintenance
- Natural Disaster
- Personnel
- Procurement
- Pet
- Trespass

(2) Section 8 Management: (list below)

- Section 8 Admin
- Enterprise Income Verification
- Grievance

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)

-or-

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

Annual Statement
Capital Fund Program (CFP) Part I: Summary

Capital Fund Grant Number IL06P07950107 FFY of Grant Approval: (2007)

☒ Original Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	20,000
3	1408 Management Improvements	5,000
4	1410 Administration	5,000
5	1411 Audit	
6	1415 Liquidated Damages	
7	1430 Fees and Costs	
8	1440 Site Acquisition	
9	1450 Site Improvement	50,000
10	1460 Dwelling Structures	572,600
11	1465.1 Dwelling Equipment-Nonexpendable	45,200
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	
20	**Amount of Annual Grant (Sum of lines 2-19)**	697,800
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	

form **HUD 50075** (03/2006)

Annual Statement
Capital Fund Program (CFP) Part II: Supporting Table

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost
IL79-1 Walnut Terrace	Landscaping & Tree Trimming Resurface Parking Areas	1450	35,000
IL79-6 Scattered MIDD Sites	Landscaping & Tree Trimming	1450	15,000
IL79-1 Walnut Terrace	Install Facia, Soffits, Gutters & Downspouts, New Electric Base Board Zone Heater & Exterior Doors and Locks Using Forced Account Labor	1460	572,600
IL79-1 Walnut Terrace	Purchase new Stoves & Refrigerators	1465.1	35,200
IL79-6 Scattered MIDD Sites	Install A/C Units into Existing Sleeves	1465.1	10.000
HA Management Improvement	Police Call Back Services	1408	5,000
Operations	HA Costs Associated with CFP	1460	20,000
Administration	HA Bookkeeping, Management, and Site Supervisor Fee for Services	1410	5,000

form **HUD 50075** (03/2006)

Annual Statement
Capital Fund Program (CFP) Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)	All Funds Expended (Quarter Ending Date)
IL79-1 Walnut Terrace	09/30/2009	09/30/2010
IL79-6 Scattered MIDD Sites	09/30/2009	09/30/2010
HA Wide Operations	09/30/2009	09/30/2010
HA Management Improvements	09/30/2009	09/30/2010
HA Administration	09/30/2009	09/30/2010

(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

-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)

Optional 5-Year Action Plan Tables					
Development Number	**Development Name (or indicate PHA wide)**	**Number Vacant Units**	**% Vacancies in Development**		
IL-79-1	**Walnut Terrace**	**0**	**0%**		
Description of Needed Physical Improvements or Management Improvements				**Estimated Cost**	**Planned Start Date (HA Fiscal Year)**
Miscellaneous Site Improvements				**119,800**	**2012**
Miscellaneous Dwelling Unit Upgrades				**268,400**	**2012**
Total estimated cost over next 5 years				**388,200**	

Optional 5-Year Action Plan Tables					
Development Number	**Development Name (or indicate PHA wide)**	**Number Vacant Units**	**% Vacancies in Development**		
IL-79-2	**Beecher Plaza & Vas Homes**	**0**	**0%**		
Description of Needed Physical Improvements or Management Improvements				**Estimated Cost**	**Planned Start Date (HA Fiscal Year)**
Miscellaneous Site Improvements Beecher Cottages & Vas Homes				**570,300**	**2008**
New Stoves & Refrigerators @ Vas Homes				**35,200**	**2008**
Miscellaneous Dwelling Unit Upgrades Beecher Cottages & Vas Homes				**563,200**	**2009**
New Stoves & Refrigerators @ Beecher Cottages				**35,200**	**2009**
Miscellaneous Site Improvements @ Beecher High Rise				**78,100**	**2010**
Miscellaneous Dwelling Unit Upgrades @ Beecher High Rise				**371,000**	**2010**
Replace Stoves				**52,200**	**2010**
Total estimated cost over next 5 years				**1,705,200**	

Optional 5-Year Action Plan Tables					
Development Number	**Development Name (or indicate PHA wide)**	**Number Vacant Units**	**% Vacancies in Development**		
IL-79-3	**Turner High Rise**	**0**	**0%**		
Description of Needed Physical Improvements or Management Improvements				**Estimated Cost**	**Planned Start Date (HA Fiscal Year)**
Miscellaneous Site Improvements				**20,000**	**2011**
Miscellaneous Dwelling Unit Upgrades				**575,400**	**2011**
Miscellaneous Common Halls & Corridors Upgrades				**38,500**	**2011**
Total estimated cost over next 5 years				**633,900**	

Optional 5-Year Action Plan Tables					
Development Number	**Development Name (or indicate PHA wide)**	**Number Vacant Units**	**% Vacancies in Development**		
IL-79-6	**Scattered MIDD Sites**	**0**	**0%**		
Description of Needed Physical Improvements or Management Improvements				**Estimated Cost**	**Planned Start Date (HA Fiscal Year)**
Miscellaneous Site Improvements				**75,200**	**2012**
Miscellaneous Dwelling Unit Upgrades				**46,500**	**2012**
Total estimated cost over next 5 years				**124,600**	

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 ☐ Disposition ☐
3. Application status (select one) Approved ☐ Submitted, pending approval ☐ Planned application ☐
4. Date application approved, submitted, or planned for submission: (DD/MM/YY)
5. Number of units affected: 6. Coverage of action (select one) ☐ Part of the development ☐ 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

☐ 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 ☐ Occupancy by families with disabilities ☐ Occupancy by only elderly families and families with disabilities ☐
3. Application status (select one) Approved; included in the PHA's Designation Plan ☐ Submitted, pending approval ☐ Planned application ☐
4. Date this designation approved, submitted, or planned for submission: (DD/MM/YY)
5. If approved, will this designation constitute a (select one) ☐ New Designation Plan ☐ Revision of a previously-approved Designation Plan?
6. Number of units affected: 7. Coverage of action (select one) ☐ Part of the development ☐ Total development

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

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

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

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

2. Activity Description

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

Conversion of Public Housing Activity Description
1a. Development name: 1b. Development (project) number:
2. What is the status of the required assessment? ☐ Assessment underway ☐ Assessment results submitted to HUD ☐ Assessment results approved by HUD (if marked, proceed to next question) ☐ Other (explain below)
3. ☐ Yes ☐ 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: ☐ HOPE I ☐ 5(h) ☐ Turnkey III ☐ Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one) ☐ Approved; included in the PHA's Homeownership Plan/Program ☐ Submitted, pending approval ☐ 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) ☐ Part of the development ☐ Total development

B. Section 8 Tenant Based Assistance

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

2. Program Description:

a. Size of Program

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

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

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

b. PHA-established eligibility criteria

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

- Principal residence requirement.
- Financial capacity.
- Evidence of employment or participation in employment or training activities
- Evidence of regular income.
- Participate in Homeownership counseling.
- Comply with PHA Section 8 Admin Policies.

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? DD/MM/YY

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)
Parent House	30 – 40	Specific Criteria	Early Years Program	Both
Pre-kg	120 – 130	Specific Criteria	Early Years Program	Both
Head Start	30 – 40	Specific Criteria	Springfield Urban League	Both
MCS Transitional Housing	3 – 4 families	Specific Criteria Homeless	Morgan Cass Scott Community Services	None
Camp Hope	50 – 60	Random Selection	Wells Center/PHA Main Office	Both
GED	10 – 20	Random Selection	School Dist. #117 Parent House	Both
Special Services	20 – 30	Specific Criteria	School Dist. #117	Both
500 Club	10 – 20	Specific Criteria	Council on Aging	PHA
Social Services Coordination and Exemption from Community Service	10 – 20	Specific Criteria	Morgan County Housing Authority	PHA
Section 8 Home Ownership Counseling	5 – 10	Specific Criteria	Morgan County Housing Authority	Section 8

(2) Family Self Sufficiency program/s

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

- The PHA Community Service Policy is included as an attachment (il079g06)

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)

- Jacksonville newspaper,
- Jacksonville Police Department,
- Resident complaints,
- Reports from agencies working in these developments.

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

- Vas Homes
- Turner High Rise
- Beecher Cottages
- Walnut Terrace

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)

- Police Call Back Services.

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

- Vas Homes
- Turner High Rise
- Beecher Cottages
- Walnut Terrace

C. Coordination between PHA and the police

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

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

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

- Vas Homes
- Turner High Rise
- Beecher Cottages
- Walnut Terrace

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)]

- Included as an attachment (il079e02)

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

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

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

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

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

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

1. ☒ Yes ☐ No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock , including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have **not** been addressed elsewhere in this PHA Plan?

2. What types of asset management activities will the PHA undertake? (select all that apply)

☐ Not applicable
☐ Private management
☒ Development-based accounting
☐ Comprehensive stock assessment
☐ Other: (list below)

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

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

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

2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
☒ Attached at Attachment (File name) il079d05
☐ Provided below:

3. In what manner did the PHA address those comments? (select all that apply)
☐ Considered comments, but determined that no changes to the PHA Plan were necessary.
☐ The PHA changed portions of the PHA Plan in response to comments
List changes below:

☐ Other: (list below)

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: (State of Illinois)

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

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

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

(1). Coordination and alignment of state resources and initiatives to support affordable housing and services for priority populations.

a. Released the Illinois Housing NOFA, combining housing and services funding for supportive housing projects targeting specific special needs populations.

b. Funded a coordinated home modification program for seniors and people with disabilities who are at risk of institutionalization without home modifications.

c. Implemented a Rental Housing Support Program benefiting households below 30% and 15% of median income.

d. Development of new affordable housing for seniors, people with disabilities and prisoner re-entering the community.

e. Increased renters, homebuyers and property owners' knowledge of fair housing regulations, landlord-tenant rights, and housing accessibility.

f. Increased development capacity of housing developers and communities to improve equitable access to housing resources for currently underserved communities and populations.

g. Undertaken the development of geographically targeted areas through planning, project incentives, and funding of housing development and revitalization activities.

(2). Target production plan resources for the preservation and rehabilitation of affordable housing.

a. Developed strategies to maintain the affordability and quality of housing units reaching expiration of affordability restrictions.

b. Developed programs that enables small projects to access cost effective financing throughout the year.

c. Developed strategies to reduce operating costs and maintain affordability due to increasing energy costs, property taxes, and insurance.

d. Continued to expand home repair programs in small cities and rural communities.

e. Developed agenda to preserve and expand federal resources for affordable housing and to advocate for reform to support that agenda.

f. Developed a resource education programs which outlines requirements and resources to promote improved enforcement, knowledge, and capacity in the development communities and local municipalities.

(3). Designed and implemented programs to support long term Home Ownership.

a. Increased availability of I-Loan Mortgage and Certificate programs for first time homeowners.

b. Provided mortgage and financial resources, construction financing, and home ownership assistance programs for underserved communities and populations.

c. Created and continued homeownership assistance in coordination with other State agencies to support persons with disabilities, public housing residents, and other special needs populations.

d. Ensured home buyers and home owners are prepared for successful home ownership through education programs and strategies on foreclosure prevention.

e. Increased participation and leveraging of public investments and resources in Employer Assisted Housing programs.

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.

PHA Plan
Table Library

Component 7
Capital Fund Program Annual Statement
Parts I, II, and II

Annual Statement
Capital Fund Program (CFP) Part I: Summary

Capital Fund Grant Number FFY of Grant Approval: (MM/YYYY)

☐ Original Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	
3	1408 Management Improvements	
4	1410 Administration	
5	1411 Audit	
6	1415 Liquidated Damages	
7	1430 Fees and Costs	
8	1440 Site Acquisition	
9	1450 Site Improvement	
10	1460 Dwelling Structures	
11	1465.1 Dwelling Equipment-Nonexpendable	
12	1470 Nondwelling Structures	
13	1475 Nondwelling Equipment	
14	1485 Demolition	
15	1490 Replacement Reserve	
16	1492 Moving to Work Demonstration	
17	1495.1 Relocation Costs	
18	1498 Mod Used for Development	
19	1502 Contingency	
20	**Amount of Annual Grant (Sum of lines 2-19)**	
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	

Annual Statement
Capital Fund Program (CFP) Part II: Supporting Table

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost

Annual Statement
Capital Fund Program (CFP) Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)	All Funds Expended (Quarter Ending Date)

Optional Table for 5-Year Action Plan for Capital Fund (Component 7)

Complete one table for each development in which work is planned in the next 5 PHA fiscal years. Complete a table for any PHA-wide physical or management improvements planned in the next 5 PHA fiscal year. Copy this table as many times as necessary. Note: PHAs need not include information from Year One of the 5-Year cycle, because this information is included in the Capital Fund Program Annual Statement.

Optional 5-Year Action Plan Tables			
Development Number	**Development Name (or indicate PHA wide)**	**Number Vacant Units**	**% Vacancies in Development**

Description of Needed Physical Improvements or Management Improvements	Estimated Cost	Planned Start Date (HA Fiscal Year)
Total estimated cost over next 5 years		

Optional Public Housing Asset Management Table

See Technical Guidance for instructions on the use of this table, including information to be provided.

Public Housing Asset Management								
Development Identification		**Activity Description**						
Name, Number, and Location	Number and Type of units	Capital Fund Program Parts II and III *Component 7a*	Development Activities *Component 7b*	Demolition / disposition *Component 8*	Designated housing *Component 9*	Conversion *Component 10*	Home-ownership *Component 11a*	Other (describe) *Component 17*

Carbon Monoxide Detector Act

The following changes were made to the Morgan County Housing Authority Section 8 Administrative Plan. These changes were made to reflect the requirements of the Carbon Monoxide Detector Act. Public Housing properties owned by the Housing Authority do not use combustible fuels, or are not sufficiently close to a combustible source, as determined by the local building inspector. All Public Housing properties use electric zone heaters, electric stoves, and electric hot water heaters.

N. Carbon Monoxide Alarm Detectors

1. Performance Requirements

a. Each dwelling unit, and every structure that contains more than one dwelling unit, shall be equipped with at least one approved carbon monoxide alarm in an operating condition within 15 feet of every room used for sleeping purposes. The carbon monoxide detector may be combined with smoke detecting devices providing that the combined unit complies with the respective provisions of the administrative code, reference standards, and departmental rules relating to both smoke detecting devices and carbon monoxide alarms and provided that the combined unit emits an alarm in a manner that clearly differentiates the hazard. If the dwelling unit is occupied by any hearing-impaired person, the carbon monoxide detectors must have an alarm system, designed for hearing-impaired persons.

b. It is the responsibility of the owner of the structure to supply and install all required alarms. It is the responsibility of the tenant to test and to provide general maintenance for the alarms within the tenant's dwelling unit, and to notify the owner in writing of any deficiencies that the tenant cannot correct. The owner is responsible for providing one tenant per dwelling unit with written information regarding alarm testing and maintenance.

The tenant is responsible for replacement of any required batteries in the carbon monoxide alarms in the tenant's dwelling unit, except that the owner shall ensure that the batteries are in operating condition at the time the tenant takes possession of the dwelling unit. The tenant shall provide the owner or the authorized agent of the owner with access to the dwelling unit to correct any deficiencies in the carbon monoxide alarm that have been reported in writing to the owner or authorized agent of the owner.

c. The carbon monoxide alarms may be either battery powered, plug-in with battery back-up, or hard wired into the structure's AC power line with secondary battery back-up.

d. The following residential units shall not require carbon monoxide detectors:

1. A residential unit in a building that: (i) does not rely on combustion of a fossil fuel for heat, ventilation, or hot water; (ii) is not connected in any way to a garage; and (iii) is not sufficiently close to any ventilated source of carbon monoxide, as determined by the local building inspector, to receive carbon monoxide from that source.

2. A residential unit that is not sufficiently close to any source of carbon monoxide from that source, as determined by the local building inspector.

COMMUNITY SERVICE AND SELF SUFFICIENCY POLICY

I. GENERAL

In order to be eligible for continued occupancy, each adult family member must either (1) contribute eight hours per month of community service (not including political activities) within the community in which the public housing development is located, or (2) participate in an economic self-sufficiency program unless they are exempt from this requirement

II. EXEMPTIONS

The following adult family members of tenant families are exempt from this requirement.

A. Family members who are 62 or older

B. Family members who are blind or disabled

C. Family members who are the primary care giver for someone who is blind or disabled

D. Family members engaged in work activity

E. Family members who are exempt from work activity under part A title IV of the Social Security Act or under any other State welfare program, including the welfare-to-work program

F. Family members receiving assistance under a State program funded under part A title IV of the Social Security Act or under any other State welfare program, including welfare-to-work and who are in compliance with that program

III. NOTIFICATION OF THE REQUIREMENT

The MORGAN COUNTY HOUSING AUTHORITY shall identify all adult family members who are apparently not exempt from the community service requirement.
The MORGAN COUNTY HOUSING AUTHORITY shall notify all such family members of the community service requirement and of the categories of individuals who are exempt from the requirement. The notification will provide the opportunity for family members to claim and explain an exempt status. The MORGAN COUNTY HOUSING AUTHORITY shall verify such claims.
The notification will advise families that their community service obligation will begin upon the effective date of their first annual reexamination on or after 10/1/99. For family's paying a flat rent, the obligation begins on the date their annual reexamination

would have been effective had an annual reexamination taken place. It will also advise them that failure to comply with the community service requirement will result in ineligibility for continued occupancy at the time of any subsequent annual reexamination.

IV. VOLUNTEER OPPORTUNITIES

Community service includes performing work or duties in the public benefit that serve to improve the quality of life and/or enhance resident self-sufficiency, and/or increase the self-responsibility of the resident within the community.

An economic self sufficiency program is one that is designed to encourage, assist, train or facilitate the economic independence of participants and their families or to provide work for participants. These programs may include programs for job training, work placement, basic skills training, education, English proficiency, work fare, financial or household management, apprenticeship, and any program necessary to ready a participant to work (such as substance abuse or mental health treatment).

The MORGAN COUNTY HOUSING AUTHORITY will coordinate with social service agencies, local schools, and the Human Resources Office in identifying a list of volunteer community service positions.

Together with the resident councils, the MORGAN COUNTY HOUSING AUTHORITY may create volunteer positions such as hall monitoring, litter patrols, and supervising and record keeping for volunteers.

V. THE PROCESS

At the first annual reexamination on or after October 1, 1999, and each annual reexamination thereafter, the MORGAN COUNTY HOUSING AUTHORITY will do the following:

A. Provide a list of volunteer opportunities to the family members.
B. Provide information about obtaining suitable volunteer positions.
C. Provide a volunteer time sheet to the family member. Instructions for the time sheet require the individual to complete the form and have a supervisor date and sign for each period of work.
D. Keep track of the family member's progress monthly and verify that the adult family member is in compliance with the community service requirement.

VI. NOTIFICATION OF NON-COMPLIANCE WITH COMMUNITY SERVICE REQUIREMENT

The MORGAN COUNTY HOUSING AUTHORITY will notify any family found to be in noncompliance of the following:

A. The family member(s) has been determined to be in noncompliance;

B. That the determination is subject to the grievance procedure; and

C. That, unless the family member(s) enter into an agreement to comply, the lease will not be renewed or will be terminated;

VII. OPPORTUNITY FOR CURE

The MORGAN COUNTY HOUSING AUTHORITY will offer the family member(s) the opportunity to enter into an agreement prior to the anniversary of the lease. The agreement shall state that the family member(s) agrees to enter into an economic self-sufficiency program or agrees to contribute to community service for as many hours as needed to comply with the requirement over the past 12-month period. The cure shall occur over the 12-month period beginning with the date of the agreement and the resident shall at the same time stay current with that year's community service requirement. The first hours a resident earns goes toward the current commitment until the current year's commitment is made.

If any applicable family member does not accept the terms of the agreement, does not fulfill their obligation to participate in an economic self-sufficiency program, or falls behind in their obligation under the agreement to perform community service by more than three (3) hours after three (3) months, the MORGAN COUNTY HOUSING AUTHORITY shall take action to terminate the lease.

DECONCENTRATION POLICY

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

The MORGAN COUNTY HOUSING AUTHORITY will affirmatively market our housing to all eligible income groups. Lower income residents will not be steered toward lower income developments and higher income people will not be steered toward higher income developments.

Prior to the beginning of each fiscal year, we will analyze the income levels of families residing in each of our developments, the income levels of census tracts in which our developments are located, and the income levels of the families on the waiting list. Based on this analysis, we will determine the level of marketing strategies and deconcentration incentives to implement. The worksheet for the analysis can be found in **Appendix 1**.

DECONCENTRATION INCENTIVES

The MORGAN COUNTY HOUSING AUTHORITY may offer one or more incentives to encourage applicant families whose income classification would help to meet the deconcentration goals of a particular development.

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

- Receive a payment of moving costs up to $100.00;
- Use of a new appliance;
- Housing Authority will pay a non refundable Security Deposit.

OFFER OF A UNIT

When the MORGAN COUNTY HOUSING AUTHORITY discovers that a unit will become available, we will contact the first family on the waiting list who has the highest priority for this type of unit or development and whose income category would help to meet the deconcentration goal and/or the income targeting goal.

The MORGAN COUNTY HOUSING AUTHORITY will notify the family of a unit offer via first class mail. The family will be given five (5) business days from the date the letter was mailed to contact the MORGAN COUNTY HOUSING AUTHORITY regarding the offer.

The family will be offered the opportunity to view the unit. After the opportunity to view the unit, the family will have two (2) business days to accept or reject the unit. This offer and the family's decision must be documented in the tenant file. If the family rejects the offer of the unit, the MORGAN COUNTY HOUSING AUTHORITY will send the family a letter documenting the offer and the rejection.

REJECTION OF UNIT

If in making the offer to the family the MORGAN COUNTY HOUSING AUTHORITY skipped over other families on the waiting list in order to meet their deconcentration goal or offered the family any other deconcentration incentive and the family rejects the unit, the family will not lose their place on the waiting list and will not be otherwise penalized.

If the MORGAN COUNTY HOUSING AUTHORITY did not skip over other families on the waiting list to reach this family, did not offer any other deconcentration incentive, and the family rejects the unit without good cause, the family will forfeit their application's date and time. The family will keep their preferences, but the date and time of application will be changed to the date and time the unit was rejected.
If the family rejects with good cause any unit offered, they will not lose their place on the waiting list. Good cause includes reasons related to health, proximity to work, school, and childcare (for those working or going to school). The family will be offered the right to an informal review of the decision to alter their application status.

MORGAN COUNTY HOUSING AUTHORUTY

SUBSTANTIAL DEVIATION STATEMENT

Substantial deviations or significant amendments or modifications are defined as discretionary changes in the plans or polices of the Housing Authority that fundamentally change the mission, goals, objectives or plans of the agency and require an open public meeting, resident consultation including comments and formal approval of the Board of Commissioners.

VIOLENCE AGAINST WOMEN'S ACT
HOUSING OPPORTUNITIES AND SAFETY FOR BATTERED WOMEN AND CHILDREN

Addressing the Housing Needs of Victims of Domestic Violence, Dating Violence, Sexual Assault, and Stalking

PROGRAMS AND SERVICES

The Morgan County Housing Authority currently offers a Transitional Housing Program in direct partnership with MCS Community Services providing temporary housing to displaced families with children. Many of whom may or may not have been a victim of domestic violence, dating violence, or stalking.

The MCHA entered into an agreement with MCS Community Services to lease two MCHA units for this Transitional Housing Program. The program is funded through the Continuum of Care, and provides a temporary home for these families. The MCS Program Coordinator working in coordination with the Morgan County Relief Office identifies the barriers preventing these families from moving into permanent housing, and coordinates services to remove these barriers. The HA Social Services Coordinator, and Public Housing Occupancy Specialist work in support of the MCS staff in the coordination of services.

POLICY CHANGES

The following changes were made to the Morgan County Housing Authority Admissions and Continued Occupancy Plan and Section 8 Administrative Plan. These changes were made to reflect the requirements of the Violence Against Women's Act.

The Violence Against Women's Act prohibits the MORGAN COUNTY HOUSING AUTHORITY from denying assistance or terminating tenancy because the applicant or members of the applicants household is a victim of domestic violence, dating violence, or stalking if the applicant is otherwise qualified to receive such assistance.

If the perpetrator is a member of the families' household, the Housing Authority may require the individual to leave the household as a condition of receiving continued assistance for the remaining family.

The Housing Authority or owner may not terminate the lease solely on the basis of the tenant's status as a victim of domestic violence, dating violence, or stalking unless the they can demonstrate an "actual and imminent threat to other tenants or those employed at or providing service to the property" if the tenancy, occupancy,

or program assistance of the victim is not terminated.

The Housing Authority or owner may terminate the lease of victims of domestic violence, dating violence, and stalking violence if the termination is for a lease violation premised on something other than an act of domestic violence, dating violence, or stalking against the victim and they hold the victim to a standard no more “demanding” than the standard to which other tenants are held.

EXECUTIVE SUMMARY

The Morgan County Housing Authority has prepared this Agency Plan in compliance with Section 511 of the Quality Housing and Work Responsibility Act of 1998 and the ensuing HUD requirements.

We have adopted the following mission statement to guide the activities of the Morgan County Housing Authority.

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

We have also adopted the following goals and objectives for the next five years.

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

Objectives:

1. Maintain occupancy at 97% or better.

2. Improve public housing management and become a high performer.

3. Renovate and/or modernize public housing project wide.

4. Leverage private or other public funds to create additional mixed finance housing opportunities.

5. Implement project based accounting.

6. Revise Public Housing Admissions and Continued Occupancy Policy, HA Lease, and Section 8 Administrative Plan to address the needs of victims of domestic violence, dating violence, sexual assault, and stalking.

Goal Two: Improve community quality of life and economic vitality.

Objectives:

1. Implement public housing security improvements to reduce crime rates so that they are less than the surrounding neighborhoods.

2. The Morgan County Housing Authority will refine our Memorandum of Understanding with the Jacksonville Police Department to better define the “edge problem” of crime that occurs near our developments and develop strategies for identifying and reducing this problem.

3. The Morgan County Housing Authority will reduce evictions due to violations of criminal laws through aggressive screening procedures.

4. The Morgan County Housing Authority will refine the Networking Agreement with the Crisis Center Foundation, a non-profit organization dedicated to providing services to victims of domestic violence and their children, to address the needs of victims of domestic violence, dating violence, sexual assault, and stalking.

Goal Three: Promote self-sufficiency and asset development of families and individuals.

1. Provide and or attract supportive services to improve resident employability and self-sufficiency.

2. Implement Section 8 Tenant Based Homeownership Program.

3. Provide or attract supportive services that will address the needs of victims of domestic violence, dating violence, sexual assault, and stalking.

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

The plans, statements, budget summary, policies, etc. set forth in the Annual Plan all lead towards the accomplishment of our goals and objectives. Taken as a whole, they outline a comprehensive approach towards our goals and objectives and are consistent with the Consolidated Plan. Here are just a few highlights of our 2007 Annual Plan:

IL79-1 Walnut Terrace

- Miscellaneous Site Improvements – tree trimming, landscaping, parking improvements, additional lighting.
- Replace electric base board zone heaters with new.
- Replace exteriordwelling unit doors and locks using “forced account” labor.
- Install aluminum facia, soffits and gutters using “forced account” labor.
- Purchase new stoves and refrigerators.

IL79-6 Scattered MIDD Sites

- Miscellaneous Site Improvements – tree trimming, landscaping, additional lighting.
- Replace water heaters, toilets, tub surround and lavatories.
- Install new AC in existing sleeves.

Project Wide

- Management Improvements Police “Call Back” Services.

In summary, we are on course to improve the condition of affordable housing in Morgan County.

FIVE-YEAR PLAN

MISSION STATEMENT

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

FIVE-YEAR GOALS

The goals and objectives adopted by the Morgan County Housing Authority are:

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

Objectives:

1. Maintain occupancy at 97%.
2. Improve public housing management becoming a high performer.
3. Renovate and/or modernize public housing units project wide.
4. Leverage private or public funds to create additional mixed finance housing opportunities.
5. Implement project based accounting.
6. Revise Public Housing Admissions and Continued Occupancy Policy, HA Lease, and Section 8 Administrative Plan to address the needs of victims of domestic violence, dating violence, sexual assault, and stalking.

Goal Two: Improve community quality of life and economic vitality.

Objectives:

1. Implement public housing security improvements to reduce crime rates so that they are less than the surrounding neighborhood.
2. The Morgan County Housing Authority will refine our Memorandum of Understanding with the Jacksonville Police Department to better define the "edge problem" of crime that occurs near our developments and develop strategies for identifying and reducing this problem.

3. The Morgan County Housing Authority will reduce evictions due to violations of criminal laws through aggressive screening procedures.

4. The Morgan County Housing Authority will refine the Networking Agreement with the Crisis Center Foundation, a non-profit organization dedicated to providing services to victims of domestic violence and their children, to address the needs of victims of domestic violence, dating violence, sexual assault, and stalking.

Goal Three: Promote self-sufficiency and asset development of families and individuals.

Objectives:

1. Provide or attract supportive services to improve resident employability and self-sufficiency.

2. Implement a Section 8 Tenant Based Homeownership Program.

3. Provide or attract supportive services that will address the needs of victims of domestic violence, dating violence, sexual assault, and stalking.

CAPITAL FUND PROGRAM TABLES START HERE

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name: Morgan County Housing Authority	Grant Type and Number Comprehensive Grant Program Capital Fund Program Grant No: IL06P07950106 Replacement Housing Factor Grant No:	Federal FY of Grant: FFY 2006

☐ **Original Annual Statement** ☐ **Reserve for Disasters/ Emergencies** ☒ **Revised Annual Statement (revision no:** 1)
☒ **Performance and Evaluation Report for Period Ending: 12/31/06** ☐ **Final Performance and Evaluation Report**

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements Soft Costs	20,000	15,000	0	0
	Management Improvements Hard Costs				
4	1410 Administration	0	5,000	0	0
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	68,580	68,580	997.50	997.50
8	1440 Site Acquisition				
9	1450 Site Improvement	54,800	54,800	0	0
10	1460 Dwelling Structures	423,571	423,571	27,330.76	27,330.76
11	1465.1 Dwelling Equipment—Non-expendable	71,600	71,600		
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	1499 Development Activities				
19	1502 Contingency				

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name: Morgan County Housing Authority	Grant Type and Number Comprehensive Grant Program Capital Fund Program Grant No: IL06P07950106 Replacement Housing Factor Grant No:	Federal FY of Grant: FFY 2006

☐ **Original Annual Statement** ☐ **Reserve for Disasters/ Emergencies** ☒ **Revised Annual Statement (revision no:** 1)
☒ **Performance and Evaluation Report for Period Ending: 12/31/06** ☐ **Final Performance and Evaluation Report**

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
	Amount of Annual Grant: (sum of lines…..)	638,551	638,551	28,328.26	28,328.26
	Amount of line XX Related to LBP Activities				
	Amount of line XX Related to Section 504 compliance				
	Amount of line 3 Related to Security –Soft Costs				
	Amount of Line XX related to Security—Hard Costs				
	Amount of line XX Related to Energy Conservation Measures				
	Collateralization Expenses or Debt Service				

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

PHA Name: Morgan County Housing Authority		**Grant Type and Number** Capital Fund Program Grant No: IL06P07950106 Replacement Housing Factor Grant No:					**Federal FY of Grant:** 2006		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories		Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
IL79-2 Beecher, Cottages & Vas Homes	Increase Parking Spaces, Reseal & Stripe Existing Parking Lots		1450	100%	25,000	25,000	0	0	Incomplete
IL79-3 Turner High Rise	Reseal & Stripe Parking Lots		1450	100%	39,800	39,800	0	0	Incomplete
IL79-3 Turner High Rise	Replace Fabricated Showers, Entryway Windows & Doors, Replace Ceiling Tiles		1460	100%	423,571	423,571	27,330.76	27,330.76	In Progress
IL79-3 Turner High Rise	Replace Stoves & Refrigerators		1465.1	100%	71,600	71,600	0	0	Incomplete
Fees & Costs	Prepare Bids, Develop Specifications & Contract Management Services Phase XIII		1430	10%	68,580	68,580	997.50	997.50	In progress
Administration	CFP Management, Project Supervision, Bookkeeping & Accounting		1410	1%	5,000	5,000	0	0	Incomplete
Operations	HA Costs Associated with CFP								

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

PHA Name: Morgan County Housing Authority	**Grant Type and Number** Capital Fund Program No: IL06P07950106 Replacement Housing Factor No:	**Federal FY of Grant: 2006**

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	
IL79-2 Beecher Cottages & Vas Homes	9/30/08			9/30/2011			
IL79-3 Turner High Rise	9/30/08			9/30/2011			
PHA Wide Operations	9/30/08			9/30/2011			
A&E Fees & Costs	9/30/08			9/30/2011			
HA Administration	9/30/08			9/30/2011			

CAPITAL FUND PROGRAM TABLES START HERE

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name: Morgan County Housing Authority	Grant Type and Number Comprehensive Grant Program Capital Fund Program Grant No: IL06P07950105 Replacement Housing Factor Grant No:	Federal FY of Grant: FFY 2005

☐ **Original Annual Statement** ☐ **Reserve for Disasters/ Emergencies** ☐ **Revised Annual Statement (revision no:** 2)
☒ **Performance and Evaluation Report for Period Ending: 12/31/06** ☐ **Final Performance and Evaluation Report**

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements Soft Costs	30,000	14,931.08	14,931.08	14,931.08
	Management Improvements Hard Costs				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	50,000	16,294.79	16,294.79	16,294.79
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	498,013	534,637.68	534,637.68	534,637.68
11	1465.1 Dwelling Equipment—Non-expendable	95,000	114,366	114,366	114,366
12	1470 Non-dwelling Structures	8,000	0	0	0
13	1475 Non-dwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name: Morgan County Housing Authority	Grant Type and Number Comprehensive Grant Program Capital Fund Program Grant No: IL06P07950105 Replacement Housing Factor Grant No:	Federal FY of Grant: FFY 2005

☐ **Original Annual Statement** ☐ **Reserve for Disasters/ Emergencies** ☐ **Revised Annual Statement (revision no:** 2)
☒ **Performance and Evaluation Report for Period Ending: 12/31/06** ☐ **Final Performance and Evaluation Report**

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
18	1499 Development Activities				
19	1502 Contingency				
	Amount of Annual Grant: (sum of lines…..)	681,013	680,229.55	680,229.55	680,229.55
	Amount of line XX Related to LBP Activities				
	Amount of line XX Related to Section 504 compliance				
	Amount of line 3 Related to Security –Soft Costs	30,000	30,000	14,931.08	14,931.08
	Amount of Line XX related to Security—Hard Costs				
	Amount of line XX Related to Energy Conservation Measures				
	Collateralization Expenses or Debt Service				

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

PHA Name: Morgan County Housing Authority		**Grant Type and Number** Capital Fund Program Grant No: IL06P07950105 Replacement Housing Factor Grant No:					**Federal FY of Grant:** 2005		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories		Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
IL79-2 Vas Homes	Dwelling Unit Upgrades Window Replacement Using Force Account Labor		1460	100%	180,000	250,963	280,455.68	280,455.68	Complete
IL79-2 Beecher Cottages	Dwelling Unit Upgrades Window Replacement		1460	100%	185,220	237,050	254,182.00	254,182.00	Complete
IL79-3 Turner High Rise	Air Conditioners, Stoves & Refrigerators		1465.1	100%	51,000	105,000	114,366.00	114,366.00	Complete
IL79-3 Turner High Rise	Replace Make Up Air Unit		1470	100%	8,000	8,000	0	0	Repaired In House
Management Improvements	Security Police “Call Back” Services		1408	100%	30,000	30,000	14,931.08	14,931.08	Incomplete
A&E Costs	Phase XII Contract Administration – PNA & Energy Audit		1430	100%	50,000	50,000	16,295.79	16,295.79	Complete

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

PHA Name: Morgan County Housing Authority	**Grant Type and Number** Capital Fund Program No: IL06P07950105 Replacement Housing Factor No:	**Federal FY of Grant:** 2005

Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
IL79-2 Vas Homes	9/30/07	12/31/06		9/30/09	12/31/06		
IL79-2 Beecher Cottages	9/30/07	12/31/06		9/30/09	12/31/06		
IL79-3 Turner High Rise	9/30/07	12/31/06		9/30/09	12/31/06		
PHA Wide Management Improvements	9/30/07			9/30/09			
A&E Fees & Costs	9/30/07	12/31/06		9/30/09	12/31/06		

680,229.55

MORGAN COUNTY HOUSING AUTHORITY
CAPITAL FUND PROGRAM
PERFORMANCE & EVALUATION REPORT
Period Ending 12/31/2006
IL06P07950106

The Morgan County Housing Authority has not used any other funds, such as Community Development Block Grant, State, local or private funds for the needs identified in the Housing Authority's Agency Plan or for the purpose of our Capital Fund Program. Additionally, we have not used any funds to perform emergency "Life/Safety" work.

IL06P07950106: Phase XIII of our Capital Fund Program includes funds for the replacement of pre-fabricated showers, interior and exterior insulated window panels, new panic devices on entryway doors, new ceiling tile and energy efficient lighting, flooring and parking lot improvements. We will also purchase new stoves and refrigerators.

Implementation Schedule: We are on schedule to complete all work items by the dates established in our Implementation Schedule. All funds have been obligated, and will be expended ahead of schedule.

Resident Partnership: I attend monthly resident council meetings keeping residents up to date, and current on the activities and progress of our modernization programs. Comments made by our residents are recorded in the minutes of these minutes and incorporated into our Due to a lack of participation I have appointed all of our tenants to the RAB. I attend City Council meetings to discuss the development, implementation and progress of our modernization programs. PHA Residents, and our Resident Councils receive copies of our P&E and Final Reports. Residents are given the opportunity to comment on our programs during our regularly scheduled MCHA Board meetings. Comments can also be submitted in writing to our office. These reports are also posted in the Housing Authority office.

MORGAN COUNTY HOUSING AUTHORITY
CAPITAL FUND PROGRAM
Performance & Evaluation Report
Period Ending 12/31/06
IL06P07950105

The Morgan County Housing Authority has not used any other funds, such as Community Development Block Grant, State, local or private funds for the needs identified in the Housing Authority's Agency Plan or for the purpose of our Capital Fund Program. Additionally, we have not used any funds to perform emergency "Life/Safety" work.

IL06P07950105: Phase XII, Miscellaneous Dwelling Unit upgrades at the Turner High Rise, and Scattered MIDD Sites is complete. As of June 30, 2006 a Final Punch of this work had been performed, and all waivers of lien, releases, shop drawings, warranties, and maintenance manuals have been turned over to the Housing Authority. As of December 31, 2006 all funds, except for $783.45, had been obligated and expended.

Management Improvements: Police "Call Back" Services: Police "call back" services are ongoing. Call Back Services include Directed Preventative Patrols, Bicycle Patrols and a Walk & Talk program. We target low-income public housing in Beat 3. Our goals are to reduce criminal activity and enhance security in and around our public housing. The Jacksonville Police Department attempts to identify and arrest criminals, deter crime and enhance resident communication and contact with law enforcement officers. We have an Inter-governmental Agreement on file with the JPD, and these services carry over from year to year.

Implementation Schedule: We are on schedule to complete all work items by the dates established in our Implementation Schedule. All funds have been obligated and expended ahead of schedule. A Final Cost Certificate for this Capital Fund Program will be sent to the Chicago HUD Office as soon as the remaining $783.45 has been expended.

Resident Partnership: I attend monthly resident council meetings keeping them up to date and current on the activities and progress of our modernization programs. Due to a lack of participation I have appointed all of our tenants to the RAB. I attend City Council meetings to discuss the development, implementation and progress of our modernization programs. PHA Residents, and our Resident Councils receive copies of our P&E and Final Reports. Residents are given the opportunity to comment on our programs during our regularly scheduled MCHA Board meetings. Comments can also be submitted in writing to our office. These reports are also posted in the Housing Authority office.

MORGAN COUNTY HOUSING AUTHORITY
PET POLICY

A. EXCLUSIONS

This policy does not apply to animals that are used to assist persons with disabilities. Assistive animals are allowed in all public housing facilities with no restrictions other than those imposed on all tenants to maintain their units and associated facilities in a decent, safe, and sanitary manner and to refrain from disturbing their neighbors.

B. *PETS IN PUBLIC HOUSNG*

The MORGAN COUNTY HOUSING AUTHORITY will allow for pet ownership in all MCHA units. No family living in these units, as a condition of occupancy, be prohibited from keeping common household pets in their unit. In addition, no family can be denied admission to units designated for use by elderly and/or disabled families because they own such pets. Animals that assist persons with a disability are excluded from this policy.

C. APPROVAL

Residents must have the prior approval of the Housing Authority before moving a pet into their unit. Residents must request approval on the Authorization for Pet Ownership Form that must be fully completed before the Housing Authority will approve the request.

D. TYPES AND NUMBER OF PETS

The MORGAN COUNTY HOUSING AUTHORITY will allow only domesticated dogs, cats, birds, and fish in aquariums in units. All dogs and cats must be neutered or spayed.

Only one (1) pet per unit allowed.

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

No animal may exceed thirty-five (35) pounds in weight.

E. INOCULATIONS

In order to be registered, pets must be appropriately inoculated against rabies and other conditions prescribed by local ordinances.

F. PET DEPOSIT

A pet deposit of $200. is required at the time of registering a pet. The deposit is refundable when the pet or the family vacate the unit, less any amounts owed due to damage beyond normal wear and tear.

G. FINANCIAL OBLIGATION OF RESIDENTS

Any resident who owns or keeps a pet in their dwelling unit will be required to pay for any damages caused by the pet. Also, any pet-related insect infestation in the pet owner's unit will be the financial responsibility of the pet owner and the MORGAN COUNTY HOUSING AUTHORITY reserves the right to exterminate and charge the resident.

H. NUISANCE OR THREAT TO HEALTH OR SAFETY

The pet and its living quarters must be maintained in a manner to prevent odors and any other unsanitary conditions in the owner's unit and surrounding areas.

Repeated substantiated complaints by neighbors or MORGAN COUNTY HOUSING AUTHORITY personnel regarding pets disturbing the peace of neighbors through noise, odor, animal waste, or other nuisance will result in the owner having to remove the pet or move him/herself.

I. DESIGNATION OF PET AREAS

Pets must be kept in the owner's apartment or on a leash at all times when outside (no outdoor cages may be constructed). Pets will be allowed only in designated areas on the grounds of the projects. Pet owners must clean up after their pets and are responsible for disposing of pet waste.

J. REMOVAL OF PETS

The MORGAN COUNTY HOUSING AUTHORITY, or an appropriate community authority, shall require the removal of any pet from a project if the pet's conduct or condition is determined to be a nuisance or threat to the health or safety of other occupants of the project or of other persons in the community where the project is located.

MORGAN COUNTY HOUSING AUTHORITY

PROGRESS REPORT

The Morgan County Housing Authority has made significant progress towards accomplishing the goals identified in our mission statement and Five-Year Plan.

In particular, here are our five-year goals and objectives and the status of each goal:

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

Objectives:

As of this date we have maintained our Public Housing vacancies to less than 5%, and remain a Standard Performer. We are working very hard to become a High Performer, and continue to build up our reserves, increase revenues, reduce operation costs, improve resident services, and renovate public housing properties. We have reduced our average unit turn-around-time to 26 days, and should increase our PHAS score by 10 points, becoming a High Performer in the next 5 years.

We have redefined our project grouping and have received HUD approval, and are currently transitioning to project based accounting. We will be in compliance with Project Based Accounting by July 1, 2008.

We have recently completed Phase XII Dwelling Unit Upgrades at the Turner High Rise and Scattered MIDD Sites. Five of the units at the Turner High Rise and two of the units at the MIDD Sites have been made fully handicapped accessible. We replaced dwelling unit windows in the Vas Homes and the roofs at the scattered MIDD Sites using "forced account labor". We repaired the "make up" air unit at the Turner High Rise and purchased new air conditioners for Turner. We purchased new appliances at the Scattered MIDD Sites and the Beecher High Rise.
In 2006 we built 4 new one-bedroom elderly/disabled handicapped accessible apartments, Project IL79-7 Beecher Cottages.

We have accepted, and approved BLDD as our architect for Phase XIII of our Mod Program. During Phase XIII we will replace the old shower surrounds at the Turner High Rise with new, renovate the interior halls and corridors, purchase new appliances, and seal coat and stripe parking areas.

We have revised our Public Housing Admissions and Continued Occupancy Policy, HA Lease, and Section 8 Administrative Plan to address the needs of victims of domestic violence, dating violence, sexual assault, and stalking.

Goal Two: Improve community quality of life and economic viability.

Objectives:

The Morgan County Housing Authority continues to screen prospective applicants and evict tenants for criminal behavior that would threaten the life, health, safety and peaceful enjoyment of our residents. We aggressively issue and enforce notices of "No Trespass" to individuals involved in criminal activity on or around public housing property. We schedule additional police "call back" services targeting public housing, and Beat Three with Directed Preventative Patrols, Bicycle Patrols and a Walk & Talk program. We hope to raise our RASS score by increasing resident confidence in law enforcement, and enhancing public awareness of our efforts to reduce crime in or around public housing.

We will renew our contract with the Jacksonville police Department redefining the problems and services the Jacksonville Police Department will provide. Overall crime is down in Morgan County. However, we have seen an increase in the incidence of violent crime, robberies, drug activity, and calls for service in Project IL79-1, the Vas Homes.

The Morgan County Housing Authority will refine the Networking Agreement with the Crisis Center Foundation, a non-profit organization dedicated to providing services to victims of domestic violence and their children, to address the needs of victims of domestic violence, dating violence, sexual assault, and stalking.

Goal Three: Promote self-sufficiency and asset development of families and individuals.

Objective:

Walnut Terrace is a "Campus of Learning". The presence of the Early Years Program at Walnut Terrace and the introduction of School District #117 teachers and staff to our public housing residents and the surrounding neighborhood have changed the public's perception of a once troubled development.

Parent Educators working for the Early Years Program provide family support services, GED Classes, violence intervention, substance abuse counseling, job training, transportation, daycare and family counseling to both our PHA residents and Section 8 HCV Families.

The Springfield Urban League Head Start and "4 Counties 4 Kids" programs are also on site in publichousing. The Head Start program now offers provide an academic head start for y ounger students. The "4 Counties 4 Kids" program offers an after school and summer recreation

program for young adults. Their presence has enriched the lives of many of the low-income families living in Jacksonville.

The 500 Club at the Beecher High Rise coordinates in home health care, “Door Bell Dinners”, grocery shopping and laundry services for our elderly/disabled residents enabling them to live independently in their apartments. The Bread of Love is located at the Beecher and Turner High Rise serves a hot lunch and an evening meal to many of our elderly/disabled tenants.

We are have providing and have attracted supportive services to our Housing Authority that are addressing the needs of victims of domestic violence, dating violence, sexual assault, and stalking. We entered into an agreement with MCS Community Services to lease two PHA for a Transitional Housing Program through the Continuum of Care. The Transitional Housing Program provides temporary homes to displaced families with children, including victims of domestic violence, dating violence, or stalking. The program identifies barriers that are preventing families from moving into permanent housing and coordinates services to remove those barriers. The HA Social Services Coordinator works with MCS staff in the coordination of these services. We accept applications from the participants for permanent housing and screen them for criminal history that would pose a threat to other PHA residents.

The MCHA Social Services Coordinator helps Public Housing residents who are non-exempt from Community Service in their search for a job and/or job training, and performs pre and post home buyer counseling for our Section 8 Homeownership Program. This last year the Housing Authority’s developed and implemented a Section 8 Voucher Homeownership Program.

In summary, we believe we are making reasonable progress towards our goals given the resources we have available to us.

Required Attachment: Resident Member on the PHA Governing Board

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

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

Margo Gilmore

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

☐ Elected
X Appointed

C. The term of appointment is (include the date term expires): **AUGUST 31, 2008**

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

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

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

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

Required Attachment: Membership of the Resident Advisory Board or Boards

Due to a lack of interest in a Resident Advisory Board I felt that it was necessary, in order to ensure that all residents of assisted housing had an opportunity to comment on the development of our Agency Plan, that I appoint them all to the Resident Advisory Board.

I continue to meet monthly with our residents during their regularly scheduled tenant council meetings keeping them informed and up to date as to the status of our modernization programs and policies and any changes therein.

I also cover the status of our Modernization Programs in the tenant newsletter, “The Scoop”, and during our monthly Board Meetings which are open to the public. The Scoop is being mailed to every MCHA tenant.

RESIDENT COMMENTS

The Morgan County Housing Authority has appointed all of our residents to the Resident Advisory Board. I meet monthly with our residents to discuss our Modernization programs and to answer any questions they may have. I also contribute to our monthly newsletter, “the Scoop” where I describe our programs to keep those tenants who are unable to attend the meetings informed about our activities. .

The Morgan County Housing Authority has engaged in an extensive process of seeking resident and public comments on our Agency Plan. In the course of compiling the Plan we engaged in the following process:

- We drafted our Agency Plan in consultation with our maintenance staff and residents.
- I meet monthly with residents during regularly scheduled Tenant Council Meetings.
- All of our tenants are encouraged to participate during these monthly meetings.
- I met with the Housing Authority Board, and reviewed the Agency Plan.
- I published a notice in the local paper stating the Plan was available for review.
- I held a Public Hearing on March 8, 2007, and no one attended.
- I submitted the Plan to the Housing Authority Board of Commissioners for their approval on April 12, 2007.

Copies of the advertisement I ran and minutes from the tenant council meetings and regular meeting of the Morgan County Housing Authority Board of Commissioners are available upon request. I had no participation in, and no comments from the “Open Public Hearing.”

The following material was available for review:

- Agency Plan
- Statement of Progress
- Annual Plan
- Five Year Plan
- P&E Report
- Executive Statement

Our residents are very thankful for all of the improvements we have been able to accomplish over the years and continue to be supportive of our efforts.

Morgan County Housing Authority
301 West Beecher
Jacksonville, Illinois, 62650

Section 8 Homeownership Capacity Statement

The Morgan County Housing Authority has the capacity to operate a successful Section 8 Homeownership program for the following reasons:

1) We have established a minimum homeowner down payment requirement of at least 3% of the purchase price for participation in the Section 8 Homeownership program, and that at least 1% of that down payment must come from the families personal resources.

2) We require that the tenant must acquire financing for purchase of a home under our Section 8 Homeownership Program, and that financing must be provided, insured, or guaranteed by State or Federal government, comply with secondary mortgage market underwriting requirements, or comply with generally accepted private sector underwriting standards.

3) We will acquire the capacity to successfully operate a Section 8 Homeownership program by partnering with the Menard County Housing Authority who is experienced in reviewing homeownership financing, by training existing staff with such experience, and by hiring new staff with such experience.

Fred J. Clinton, PHM
Executive Director

Morgan County Housing Authority

SECTION 8 HOMEOWNERSHIP PROGRAM

The Morgan County Housing Authority is proposing in implement a Section 8 tenant based Homeownership Voucher Program. Homeownership assistance offers a new opportunity for families that receive Section 8 tenant based assistance to purchase a home.

Identified in this document are the requirements and procedures that Morgan County Housing Authority will propose to utilize in administering the Section 8 Home ownership Assistance Program.

The following requirements to participate are:

1. A Family must meet the general requirements for admission to or continues participation in Section 8 Rental Assistance Program;

2. Current Section 8 participants must be in compliance with their lease and Section 8 program requirements. They will be required to terminate their current lease agreement in compliance with the lease.

3. Participants must be first time homeowners, and/or must not have owned title to principal residence in the last three years;

4. Families who have defaulted on a mortgage obtained through the homeownership program are barred from further participation.

5. Participants must complete a pre-purchase homeownership counseling program before the Housing Authority will issue the homeownership assistance. The Morgan County Housing Authority designee will work with the participants and determine their 'mortgage readiness';

6. The head of household or spouse must be full time (minimum 30 hours a week) and have been continuously employed during the calendar year prior to commencement of homeownership program. Families in which the head of household or spouse is disabled or elderly are exempt from this requirement;

7. The family's household income must be at least the Federal minimum wage times 2000 hours ($13,000). Public assistance will not be used to meet this requirement, except in disabled or elderly households. Public assistance includes (Welfare to Work grant, federal assistance, TANF assistance, SSI that is subject to an income eligibility test, food stamps, state or local programs that provide assistance to meet family living or housing expenses.

8. Participants will be required to pay for an independent inspection of the home;

9. Participants will be required to secure their own mortgage loan. Financing for purchase of a home under our Section 8 Homeownership Program must be provided, insured, or guaranteed by State or Federal government, comply with secondary mortgage market underwriting requirements, or comply with generally accepted private sector underwriting standards.

10. We have established a minimum homeowner down payment requirement of at least 3% of the purchase price for participation in the Section 8 Homeownership program, of that amount at least 1% of the down payment must come from the families personal resources.

The Morgan County Housing Authority will review all pre-applications to identify their level of readiness for homeownership. Level of readiness is as follows:

Level 1 The family is within 6 months of being ready for homeownership. Their employment history is stable the family has access to the required assets needed to secure a mortgage loan, and a minimum of 8 hours of pre-homeownership counseling has been completed or will be within 6 months.

Level 2 The family between 6 and 12 months of being ready for homeownership. The family has almost completed the 1 year requirement of employment history. The family is close to securing funds for the down payment and the family has started the pre-homeownership counseling.

Level 3 The family is more than 12 months from being ready for homeownership. The family has not met the employment requirements and work history is unstable. The family has not secured funds for the down payment and has not started pre-homeownership counseling.

If homeownership is something that you are interested in all you need to do is fill out the enclosed application and bring it to our office located at:

MORGAN COUNTY HOUSING AUTHORITY
301 WEST BEECHER
JACKSONVILLE, IL 62650
ATTN: Mrs. Linda Jones, Section 8 Specialist

Our office will review your pre-application and notify you by mail your approval status and level of readiness.