

PHA Plans
Streamlined Annual
Version

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

OMB No. 2577-0226
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This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937 that introduced 5-year and annual PHA Plans. The full PHA plan provides a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission and strategies for serving the needs of low-income and very low-income families. This form allows eligible PHAs to make a streamlined annual Plan submission to HUD consistent with HUD's efforts to provide regulatory relief for certain types of PHAs. Public reporting burden for this information collection is estimated to average 11.7 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

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Streamlined Annual PHA Plan
for Fiscal Year: 2007

PHA Name:

Perry Metropolitan Housing
Authority
OH034

NOTE: This PHA Plan template (HUD-50075-SA) is to be completed in accordance with instructions contained in previous Notices PIH 99-33 (HA), 99-51 (HA), 2000-22 (HA), 2000-36 (HA), 2000-43 (HA), 2001-4 (HA), 2001-26 (HA), 2003-7 (HA), and any related notices HUD may subsequently issue.

Streamlined Annual PHA Plan Agency Identification

PHA Name: Perry Metropolitan Housing Authority **PHA Number:** OH034

PHA Fiscal Year Beginning: (mm/yyyy) 01/01/2007

PHA Programs Administered:

Public Housing and Section 8 **Section 8 Only** **Public Housing Only**
Number of public housing units: 118 Number of S8 units: Number of public housing units:
Number of S8 units: 218

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:				

PHA Plan Contact Information:

Name: Carole Sowards, Executive Director Phone: 740 982-5991
TDD: Email (if available): carolepmha@rroho.com

Public Access to Information

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

PHA's main administrative office PHA's development management offices

Display Locations For PHA Plans and Supporting Documents

The PHA Plan revised policies or program changes (including attachments) are available for public review and inspection. Yes No.

If yes, select all that apply:

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

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

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

Streamlined Annual PHA Plan
Fiscal Year 2007
[24 CFR Part 903.12(c)]

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[24 CFR 903.7(r)]

Provide a table of contents for the Plan, including applicable additional requirements, and a list of supporting documents available for public inspection.

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<input checked="" type="checkbox"/> 2. Capital Improvement Needs	5
903.7(g) Statement of Capital Improvements Needed	
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 B. SEPARATE HARD COPY SUBMISSIONS TO LOCAL HUD FIELD OFFICE	

Form HUD-50076, *PHA Certifications of Compliance with the PHA Plans and Related Regulations: Board Resolution to Accompany the Streamlined Annual Plan* identifying policies or programs the PHA has revised since submission of its last Annual Plan, and including Civil Rights certifications and assurances the changed policies were presented to the Resident Advisory Board for review and comment, approved by the PHA governing board, and made available for review and inspection at the PHA's principal office;

For PHAs Applying for Formula Capital Fund Program (CFP) Grants:

Form HUD-50070, *Certification for a Drug-Free Workplace*;

Form HUD-50071, *Certification of Payments to Influence Federal Transactions*; and

Form SF-LLL & SF-LLLa, *Disclosure of Lobbying Activities*.

1. Site-Based Waiting Lists (Eligibility, Selection, Admissions Policies)

[24 CFR Part 903.12(c), 903.7(b)(2)]

Exemptions: Section 8 only PHAs are not required to complete this component.

A. Site-Based Waiting Lists-Previous Year

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

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

2. What is the number of site based waiting list developments to which families may apply at one time?
3. How many unit offers may an applicant turn down before being removed from the site-based waiting list?
4. Yes No: Is the PHA the subject of any pending fair housing complaint by HUD or any court order or settlement agreement? If yes, describe the order, agreement or complaint and describe how use of a site-based waiting list will not violate or be inconsistent with the order, agreement or complaint below:

B. Site-Based Waiting Lists – Coming Year

If the PHA plans to operate one or more site-based waiting lists in the coming year, answer each of the following questions; if not, skip to next component.

1. How many site-based waiting lists will the PHA operate in the coming year? 2; the PHA has 2 AMP numbers; applicants can be on either list or one with no preference (first available)
2. Yes No: Are any or all of the PHA’s site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD-approved site based waiting list plan)?
If yes, how many lists? 2; OH034-001 and OH034-002
3. Yes No: May families be on more than one list simultaneously
If yes, how many lists? 2; OH034-001 and OH034-002

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)

2. Capital Improvement Needs

[24 CFR Part 903.12 (c), 903.7 (g)]

Exemptions: Section 8 only PHAs are not required to complete this component.

A. Capital Fund Program

1. Yes No Does the PHA plan to participate in the Capital Fund Program in the upcoming year? If yes, complete items 7 and 8 of this template (Capital Fund Program tables). If no, skip to B.
2. Yes No: Does the PHA propose to use any portion of its CFP funds to repay debt incurred to finance capital improvements? If so, the PHA must identify in its annual and 5-year capital plans the development(s) where such improvements will be made and show both how the proceeds of the financing will be used and the amount of the annual payments required to service the debt. (Note that separate HUD approval is required for such financing activities.)

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

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

1. Yes No: Has the PHA received a HOPE VI revitalization grant? (if no, skip to #3; if yes, provide responses to the items on the chart located on the next page, copying and completing as many times as necessary).
2. Status of HOPE VI revitalization grant(s):

HOPE VI Revitalization Grant Status	
a. Development Name:	
b. Development Number:	
c. Status of Grant:	
	<input type="checkbox"/> Revitalization Plan under development
	<input type="checkbox"/> Revitalization Plan submitted, pending approval
	<input type="checkbox"/> Revitalization Plan approved
	<input type="checkbox"/> Activities pursuant to an approved Revitalization Plan underway

3. Yes No: Does the PHA expect to apply for a HOPE VI Revitalization grant in the Plan year?
If yes, list development name(s) below:

4. Yes No: Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year? If yes, list developments or activities below:
5. Yes No: Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement? If yes, list developments or activities below:

3. Section 8 Tenant Based Assistance--Section 8(y) Homeownership Program

(if applicable) [24 CFR Part 903.12(c), 903.7(k)(1)(i)]

1. Yes No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982 ? (If "No", skip to the next component; if "yes", complete each program description below (copy and complete questions for each program identified.)

2. Program Description: The PHA is in the fourth year of Homeownership and have had 3 successful closings. We will continue to conduct the homeownership training in-house.

a. Size of Program

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

If the answer to the question above was yes, what is the maximum number of participants this fiscal year? 3

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:

- Be a current Voucher participant for a minimum of one calendar year
- Be in good standing in the Voucher Program
- Have no indebtedness to the Voucher Program or any other subsidized housing program

c. What actions will the PHA undertake to implement the program this year (list)? Conduct the Homeownership Program classes for eligible participants; partner with local lenders, realtors, other public agencies and any other agency/business relevant to the program.

3. Capacity of the PHA to Administer a Section 8 Homeownership Program:

The PHA has demonstrated its capacity to administer the program by (select all that apply):

- Establishing a minimum homeowner downpayment requirement of at least 3 percent of purchase price and requiring that at least 1 percent of the purchase price comes from the family's resources.
- Requiring that financing for purchase of a home under its Section 8 homeownership will be provided, insured or guaranteed by the state or Federal government; comply with secondary mortgage market underwriting requirements; or comply with generally accepted private sector underwriting standards.
- Partnering with a qualified agency or agencies to administer the program (list name(s) and years of experience below):

Demonstrating that it has other relevant experience (list experience below):

4. Use of the Project-Based Voucher Program

Intent to Use Project-Based Assistance

Yes No: Does the PHA plan to “project-base” any tenant-based Section 8 vouchers in the coming year? If the answer is “no,” go to the next component. If yes, answer the following questions.

1. Yes No: Are there circumstances indicating that the project basing of the units, rather than tenant-basing of the same amount of assistance is an appropriate option? If yes, check which circumstances apply:
 - low utilization rate for vouchers due to lack of suitable rental units
 - access to neighborhoods outside of high poverty areas
 - other (describe below:)
2. Indicate the number of units and general location of units (e.g. eligible census tracts or smaller areas within eligible census tracts):

5. PHA Statement of Consistency with the Consolidated Plan

[24 CFR Part 903.15]

For each applicable Consolidated Plan, make the following statement (copy questions as many times as necessary) only if the PHA has provided a certification listing program or policy changes from its last Annual Plan submission.

1. Consolidated Plan jurisdiction: Perry County, Ohio
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 on its waiting lists 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)
 - Rehabilitation of rental property
 - Construction of single family housing for low income families
 - Homeownership

6. Supporting Documents Available for Review for Streamlined Annual PHA Plans

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
X	<i>PHA Certifications of Compliance with the PHA Plans and Related Regulations and Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans;</i>	5 Year and Annual Plans
X	<i>PHA Certifications of Compliance with the PHA Plans and Related Regulations and Board Resolution to Accompany the Streamlined Annual Plan</i>	Streamlined Annual Plans
X	<i>Certification by State or Local Official of PHA Plan Consistency with Consolidated Plan.</i>	5 Year and standard Annual Plans
X	Fair Housing Documentation Supporting Fair Housing Certifications: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans
X	Housing Needs Statement of the Consolidated Plan for the jurisdiction(s) in which the PHA is located and any additional backup data to support statement of housing needs for families on the PHA’s public housing and Section 8 tenant-based waiting lists.	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O/ACOP), which includes the Tenant Selection and Assignment Plan [TSAP] and the Site-Based Waiting List Procedure.	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Deconcentration Income Analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
	Any policy governing occupancy of Police Officers and Over-Income Tenants in Public Housing. <input type="checkbox"/> Check here if included in the public housing A&O Policy.	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the method for setting public housing flat rents. <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development. <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies (if included in plan, not necessary as a supporting document) and written analysis of Section 8 payment standard policies. <input checked="" type="checkbox"/> Check here if included in Section 8 Administrative Plan.	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation).	Annual Plan: Operations and Maintenance
X	Results of latest Public Housing Assessment System (PHAS) Assessment (or other applicable assessment).	Annual Plan: Management and Operations
	Follow-up Plan to Results of the PHAS Resident Satisfaction Survey (if necessary)	Annual Plan: Operations and Maintenance and Community Service & Self-

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
		Sufficiency
X	Results of latest Section 8 Management Assessment System (SEMAP)	Annual Plan: Management and Operations
X	Any policies governing any Section 8 special housing types <input checked="" type="checkbox"/> Check here if included in Section 8 Administrative Plan	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures. <input checked="" type="checkbox"/> Check here if included in Section 8 Administrative Plan.	Annual Plan: Grievance Procedures
X	The Capital Fund/Comprehensive Grant Program Annual Statement /Performance and Evaluation Report for any active grant year.	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grants.	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans, or any other approved proposal for development of public housing.	Annual Plan: Capital Needs
	Self-evaluation, Needs Assessment and Transition Plan required by regulations implementing Section 504 of the Rehabilitation Act and the Americans with Disabilities Act. See PIH Notice 99-52 (HA).	Annual Plan: Capital Needs
	Approved or submitted applications for demolition and/or disposition of public housing.	Annual Plan: Demolition and Disposition
X	Approved or submitted applications for designation of public housing (Designated Housing Plans).	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act, Section 22 of the US Housing Act of 1937, or Section 33 of the US Housing Act of 1937.	Annual Plan: Conversion of Public Housing
	Documentation for required Initial Assessment and any additional information required by HUD for Voluntary Conversion.	Annual Plan: Voluntary Conversion of Public Housing
X	Approved or submitted public housing homeownership programs/plans.	Annual Plan: Homeownership
X	Policies governing any Section 8 Homeownership program (Section 15 (Addenda) of the Section 8 Administrative Plan)	Annual Plan: Homeownership
X	Public Housing Community Service Policy/Programs <input checked="" type="checkbox"/> Check here if included in Public Housing A & O Policy	Annual Plan: Community Service & Self-Sufficiency
X	Cooperative agreement between the PHA and the TANF agency and between the PHA and local employment and training service agencies.	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan(s) for public housing and/or Section 8.	Annual Plan: Community Service & Self-Sufficiency
X	Section 3 documentation required by 24 CFR Part 135, Subpart E for public housing.	Annual Plan: Community Service & Self-Sufficiency
	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) program reports for public housing.	Annual Plan: Community Service & Self-Sufficiency
X	Policy on Ownership of Pets in Public Housing Family Developments (as required by regulation at 24 CFR Part 960, Subpart G). <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Pet Policy
X	The results of the most recent fiscal year audit of the PHA conducted under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings.	Annual Plan: Annual Audit
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)
	Consortium agreement(s) and for Consortium Joint PHA Plans <u>Only</u> : Certification that consortium agreement is in compliance with 24 CFR Part 943 pursuant to an opinion of counsel on file and available for inspection.	Joint Annual PHA Plan for Consortia: Agency Identification and Annual Management and Operations

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

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: Perry Metropolitan Housing Authority			Grant Type and Number Capital Fund Program Grant No: OH16-PO34-501-04 Replacement Housing Factor Grant No:		Federal FY of Grant: 2004
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 3 <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements	10000.00	8169.91	8169.91	8169.91
4	1410 Administration	20000.00	18247.19	18247.19	16372.82
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement	14975.00	9427.49	9427.49	9427.49
10	1460 Dwelling Structures	114150.00	140024.95	140024.95	149605.82
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures	11899.00	499.00	499.00	499.00
13	1475 Nondwelling Equipment	31000.00	25655.46	25655.46	25655.46
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	202024.00	202024.00	202024.00	199730.50
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance		453.12	453.12	453.12
24	Amount of line 21 Related to Security – Soft Costs		2820.00	2820.00	2820.00
25	Amount of Line 21 Related to Security – Hard Costs		5940.61	5940.61	5940.61
26	Amount of line 21 Related to Energy Conservation Measures		100197.87	100197.87	100197.87

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

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

PHA Name: Perry Metropolitan Housing Authority		Grant Type and Number Capital Fund Program Grant No: OH16-PO34-501-04 Replacement Housing Factor Grant No:				Federal FY of Grant: 2004		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Toal Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
OH034-001	Rear porch repairs	1460	5	1478.00	3869.63	3869.63	3869.63	Complete
	Replace kitchen ranges	1460	27	8073.00		8073.00	8073000	Complete
	Inspect fire suppression system	1460	2		2878.62	2878.62	2878.62	Complete
	Purchase Zoneline heat/cooling units	1460			1838.51	1838.51	1838.51	Complete
	Replace water heaters	1460			3482.22	3482.22	3482.22	Complete
	Replace Laundry Room Washer	1470			499.00	499.00	499.00	Complete
	Install Visual Signaling Devices	1475	6		906.66	906.66	906.66	Complete
	Replace tub with shower unit (ADA)	1460	1		453.12	453.12	453.12	Complete
	Replace hallway carpet & base cove	1460			16478.00	16478.00	16478.00	Complete
	Landscape Improvements	1450		1500.00	900.00	900.00	900.00	Complete
OH034-002	Install exterior hydrants	1450	14	6475.00		6475.00	6475.00	Complete
	Install washer outlets	1460	50	7599.00		7599.00	7599.00	Complete
	Replace carpet in unit 1-B	1460	1		638.51	638.51	638.51	Complete
	Security Software	1408		2820.00	2820.00	2820.00	2820.00	Complete
	Replace refrigerator in unit 9-B	1460	1		384.00	384.00	384.00	Complete
OH034-003	Roof Replacements	1460	19	95000.00	86804.14	86804.14	86804.14	Complete
	Carpet Replacement in unit #5150	1460			1679.66	1679.66	1679.66	Complete

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

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: Perry Metropolitan Housing Authority			Grant Type and Number Capital Fund Program Grant No: OH16-PO34-501-04 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Toal Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
OH034-PHA Wide	GAAP/GASB Convesion	1408		10000.00	5000.00	5000.00	5000.00	Complete
	Office furniture	1410			2039.00	2039.00	2039.00	Complete
	Purchase 2005 Ford Explorer	1475		22000.00	23248.80	23248.80	23248.80	Complete
	Purchase Carpet Extractor	1475			1500.00	1500.00	1500.00	Complete
	Replace medicine cabinets and exhaust fans	1460			7914.80	7914.80	7914.80	Complete

8. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan					
Part I: Summary					
PHA Name Perry Metropolitan Housing Authority				<input type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:	
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2005 PHA FY: 2006	Work Statement for Year 3 FFY Grant: 2006 PHA FY: 2007	Work Statement for Year 4 FFY Grant: 2008 PHA FY: 2009	Work Statement for Year 5 FFY Grant: 2008 PHA FY: 2009
	Annual Statement				
OH034-001		\$51,078	\$10,000	\$32,450	\$55,000
OH034-002		\$60,000	\$58,000	\$87,550	\$ 8,000
OH034-003		\$47,500	\$ 0	\$ 0	\$ 0
OH034-PHA Wide		\$30,200	\$98,987	\$45,000	\$80,000
CFP Funds Listed for 5-year planning	Total Estimate	\$188,778	\$166,987	\$165,000	\$143,000
Replacement Housing Factor Funds					

PERRY METROPOLITAN HOUSING AUTHORITY
 26 Brown Circle Drive
 Crooksville, Ohio 43731
 (740) 982-5991

THE ANNUAL PLAN
EXECUTIVE SUMMARY
FYE 12/31/2007

1. **Housing Needs:** The Perry Metropolitan Housing Authority has determined that the housing needs for low-income and very-low income families (including families with disabilities and elderly families) within its jurisdiction, the surrounding area and on the waiting list are as follows:

- a. Housing that is decent, safe, sanitary and affordable
- b. Housing for working families: very-low, low and moderate income families need affordable housing within reasonable proximity to their employment, schools, families, child-care, health care, etc.

c. Current Waiting List Data – number of applicants as of 09/01/2006:

<u>Bedroom Size</u>	<u>Public Housing</u>	<u>Section 8 Voucher</u>
One Bedroom	14	28
Two Bedroom	34	68
Three Bedroom	32	52
Four Bedroom	4	1
TOTAL APPLICANTS	84	150

d. Recap of family member characteristics of applicants as of 09/01/2006:

<u>Category</u>	<u>Public Housing</u>	<u>Section 8 Voucher</u>
Race - white	84	148
Race - black	0	2
Race - Hispanic	0	0
Female head of household	69	113
Male head of household	15	37
Elderly	7	0
Elderly - disabled	3	5
Non elderly	70	125
Non elderly – disabled	4	20

d. The most recent *Community Housing Improvement Strategy Update (2004-2008)* for Perry County, Ohio reports that the affordability of rental housing in Perry County, Ohio has improved but yet a high population still cannot find affordable housing. The 2000 census shows 45.1% of the population is low to moderate income and of that population, 99.4% are Caucasian. Median household income for FY 2006 for a one person to a 6 person household compares as follows:

- Median family income for Perry County, Ohio: \$47,300
- One person household: low income \$29,000; very low income \$18,150
- Two person household: low income \$33,150; very low income \$20,700
- Three person household: low income \$37,300; very low income \$23,300
- Four person household: low income \$41,450; very low income \$25,900
- Five person household: low income \$44,750; very low income \$27,950
- Six person household: low income \$48,100; very low income \$30,050

The Perry County Housing Advisory Committee has agreed to focus on the type of housing assistance to be offered as opposed to totally targeting specific neighborhoods. Over 45% of all housing units in the county are over 40 years old. Preservation of existing housing stock should be given a priority as well as development of new housing for low to moderate income families, The need is substantial for rental housing for the 0 -30% and 30-50% income bracket families.

e. Income data by source on families currently being assisted by Perry Metropolitan Housing Authority as of 09/01/2006:

<u>Category</u>	<u>Public Housing</u>	<u>Section 8 Voucher</u>
Source of household income:		
Child support	32	43
General assistance	69	146
Wages	54	53
Pension	24	6
Social Security	59	65
SSI	37	82
TANF Assistance	13	82
Military	0	16
Non-wage	0	0
Unemployment	1	2

f. Average adjusted annual income as of 09/01/2006:

Public Housing: \$11,841.76

Section 8 Voucher: \$7,206.14

2. **Financial Resources:** Estimated and actual financial resources available to support the Public Housing and Section 8 Housing Choice Voucher programs administered by Perry Metropolitan Housing Authority are defined as follows:

a. *Public Housing Operations* (estimated - FYE 12/31/2007):

Operating Receipts:

Subsidy - \$304,346

Dwelling Rent - \$258,870

Excess Utility - \$1,560

Estimated Cash Reserve – (\$37,889)

Operating Expenditures:

Administration - \$166,600

Tenant Services - \$4,000

Utilities - \$109,385

Maintenance - \$208,060

General Expenses - \$49,992

Non-Routine Expenses - \$2,230

b. *Modernization:*

Capital Fund OH16-PO34-501-04: Total Grant Award: \$202,024

Total Obligated Funds: \$202,024

Total Expended Funds (through 08/31/06): \$197,856.13

Capital Fund OH16-PO34-501-05: Total Grant Award: \$188,778

Total Obligated Funds: \$136,500

Total Expended Funds (through 08/31/06): \$5662.71

Capital Fund OH16-PO34-501-06: Total Grant Award: \$166,987

Total Obligated Funds: \$0.00

Total Expended Funds: \$0.00

NOTE: Budget under preparation for approval @ 10/5.06 Board Meeting

Capital Fund OH16-PO34-501-04: The following major work has been completed-to-date:

- Project OH034-001: Rear porch replacement at house #47 and 49 – completed
 - Replace/improve landscaping – proposed
 - Replace kitchen ranges in 1 BR apartments – completed
 - Paint siding on 23 single family dwellings - proposed
- Project OH034-002: Replace exterior hydrants on residential buildings - complete
 - Replace washer outlets in 50 residential units – complete
 - Replace/improve landscaping – proposed
 - Concrete sidewalk grinding – proposed
 - Replace lighting – in progress
- Project OH034-003: Replace/improve landscaping – proposed
 - Reshingle roofing on 19 dwellings – proposed
- Project OH034-PHA Wide: Management Improvements – accounting services – complete
 - Software upgrades – proposed
 - Administration – in progress
 - Replace Community Room carpets – proposed
 - Replace 1994 truck – complete
 - Mowing equipment – proposed

Capital Fund OH16-PO34-501-05:

- Project OH034-001: Garage extension – proposed
 - Carpet replacement – proposed
 - Replace Zonelines – proposed
 - Replace hot water tanks – proposed
- Project OH034-002: Carpet replacement – proposed
 - Playground equipment – proposed
- Project OH034-003: Carpet replacement – proposed
- Project OH034-PHA Wide: Management improvements – proposed
 - Administration - proposed

c. McKinney Act Refunding Agreement:

As a result of entering into a Refunding Agreement dated 12/1/98 with the U.S. Department of Housing and Urban Development, acting through the New Lexington Housing Development Corporation as its instrumentality, proceeds from the issuance of refunding bonds was approved for Perry MHA. The balance of expended funds received to date = \$1,045.41 posted to the Section 8 Voucher account.

d Section 8 Housing Choice Voucher Program (estimated funding FYE 12/31/2006):

Operating Receipts:

- Annual HUD Contributions - \$914,121
- Interest - \$2,000
- Repayments - \$1,500

Operating Expenses:

- Housing Assistance Payments – \$1,042,272
- Administration - \$102,940
- Hard-to-House - \$1,800
- Audit - \$3,000

3. Services to Assisted Families:

1. Nutrition Program for elderly and disabled
2. Summer Youth Nutrition Program

3. County recycling program
4. Community Action Head Start
5. "One Stop" Program
6. Local Ministerial Association
7. Local community recreation centers
8. Voting precinct
9. Meeting facility for community organizations
10. Disaster Planning
11. County Food Bank/Commodities
12. Area Agency on Aging
13. Family Self-Sufficiency Program (Section 8)
14. Homeownership (Section 8)
15. County Health Department Immunization Program
16. Wellness Programs
17. Work Experience Program sponsor

4. Policies Regarding Eligibility, Selection and Admissions: The following policies are incorporated into the PHA's Annual Plan as attachments:

1. *Admission and Continued Occupancy Policy*
2. Waiting List
3. Deconcentration

5. Rent Determination Policies:

a. *Public Housing:*

1. Minimum Rent: \$50.00/month in Public Housing; family cannot be evicted if unable to pay the minimum rent if actual hardship is proven to exist.
2. Utility Allowance:
 - a. Consumption and costs are obtained annually from local gas and electric providers for each dwelling unit per project. An average is taken per bedroom size per project and the utility allowance is adjusted accordingly based on those averages.
3. Flat Rent: Flat rent is reviewed annually based upon current financial statement data (per unit month operating expenses), Fair Market Rent and rent reasonableness data. Current flat rents are:
 - One bedroom: \$342.00
 - Two bedroom: \$363.00
 - Three bedroom: \$385.00
 - Four bedroom: \$408.00
- 4 Ceiling Rent: defined the same as Fair Market Rent
5. Income Based Rent: additional allowances recognized in determining base rent:
 - a. Paying Child Support: \$480.00/annum/child
 - b. Working Family or Student: \$480.00/annum/family; student must be enrolled in an accredited program (college, university, technical or vocational)
 - c. Family Medical: un-reimbursed medical expenses; allowance is calculated in same manner as elderly or disabled person
 - d. Spousal Support: up to \$550.00/annum

b. *Section 8 Housing Choice Voucher:*

1. Minimum rent: \$50.00/month; family cannot be terminated if unable to pay minimum rent if actual hardship is proven to exist
2. Payment Standard: is based upon current *Fair Market Rent* as well as the Housing Authority's data on average HAP and tenant payments per bedroom size; payment standards are reviewed annually and adjusted as needed. Current payment standards are:
 - One bedroom: \$415.00 Two bedroom: \$499.00 Three bedroom: \$624.00

The PHA has not established a four (4) bedroom payment standard due to the lack of participation by larger families and unavailability of four (4) bedroom dwellings.

3. **Utility Allowance:** data on rates for utility companies providing the utility in the jurisdiction of the PHA is reviewed annually; an adjustment to the utility allowance is made based on that data. An allowance is provided for both one and two story dwellings.

6. Operation and Maintenance: not required to respond (high performer + small PHA).

7. Grievance Procedure: not required to respond (high performer + small PHA).

8. Capital Improvements Needed: The capital improvements deemed necessary to ensure the long-term physical and social viability of our housing communities have been completed or are in the process of being completed. The following *Comprehensive Improvement Assistance Program (CIAP)* grants have been received, expended and cost certified:

- CIAP OH16-P034-905-85: \$59,500
- CIAP OH16-P034-906/907-91/92: \$355,600
- CIAP OH16-P034-908-93: \$520,000
- CIAP OH16-P034-909-94: \$226,000
- CIAP OH16-P034-910-95: \$151,845
- CIAP OH16-P034-911-96: \$222,583
- CIAP OH16-P034-912-97: \$240,000
- CIAP OH16-P034-913-98: \$240,000
- CIAP OH16-P034-914-99: \$187,558

The following *Capital Fund (CF)* program grant has been received, expended and cost certified:

- CF OH16-P034-501-00: \$219,190
- CF OH16-P034-501-01: \$222,755
- CF OH16-P034-501-02: \$212,015
- CF OH16-P034-501-03: \$209,210
- CF OH16-P034-502-03: \$34,766 (submitted to HUD 7/8/05 for cost certification)

The following *Capital Fund (CF)* program grants are in progress:

- CF OH16-P034-501-04: \$202,024
- CF OH16-P034-501-05: \$188,778 (Note: awaiting release of funds from REAC (LOCCS))

9. Demolition and Disposition: The PHA has no immediate plans to request approval of demolition or deposition of any property; current housing stock is thirty (30) years old or less. Capital improvement grants have afforded us the opportunity to make necessary repairs/replacements and the overall condition of our properties is good.

10. Property Designated as Housing for Elderly or Disabled: The PHA received approval from the U.S. Department of Housing and Urban Development August 20, 2001 to designate 26 one bedroom apartments for elderly and disabled persons, development number OH034-001, *James L. Brown Terrace Heights*. 21 units are designated for elderly and 5 are designated for disabled persons. There are no immediate plans to request any additional designated housing.

11. Conversion of Housing to Tenant-Based Assistance: The PHA has no immediate plans to convert any property to tenant-based assistance nor is any property covered by the mandatory conversion requirement at this time.

12. Homeownership Program: The PHA entered into a *Memorandum of Understanding* with the U.S. Department of Housing and Urban Development June 24, 2003 which is a mutual commitment to enhance homeownership opportunities for participants of the Homebuyer Education Learning Program (HELP). This homeownership program will be funded through the Section 8 Housing Choice Voucher funding. The PHA held the first class September 23, 2003 with five participants; four completed and received certifications. The PHA's Homeownership Policy states we plan to issue a total of 3 voucher certificates to eligible participants per calendar year for homeownership and will continue to add 3 per calendar year thereafter for a period of ten years; maximum number of homeownership participants will be no more than 30 during this 10 year time frame.

13. Community Service Requirements: The PHA redesigned its community service policy that complies with the requirements set forth in Section 512 of the *Quality Housing and Work Responsibility Act of 1998*. The policy defines the rules stated in this Act. An addendum was added to the public housing dwelling lease to include the community service requirements. A community service resident status form is completed by each resident 18 years of age and older as appropriate but no less than annually at the recertification. Those 62 years of age or permanently disabled are only required to complete this form one time. Residents required to do community service are provided a form each month which must be completed and signed by a responsible person where the community service is performed. Residents are also provided a list of acceptable community service work. The PHA makes every effort in assisting those residents required to complete community service hours, to understand its concept and help them select the type of work that will be acceptable. The dwelling lease is not renewed at the annual recertification if the resident has failed to comply with the community service requirements

14. Policies and Rules for Ownership of Pets: A Pet Policy has been established that provides guidelines which governs the ownership of pets in all the public housing communities of the PHA. This policy is being amended to prohibit pets except birds, caged animals or companion/service animals at Parkview Arms Apartments. In addition, an annual fee will be required for all pets: \$50.00 for a dog/cat, \$25.00 for rodents and \$10.00 for fish/birds.

15. Civil Rights Certification: Perry Metropolitan Housing Authority does not discriminate in any way in respect in regard to race, religion, creed, color, nationality, and/or disability in any housing program or employment.

16. Fiscal Year Audit: The financial audit for the period ending 12/31/2004 has been completed and approved. The audit is on file with the U.S. Department of Housing and Urban Development, the State of Ohio Auditor's Office, the administrative office of Perry MHA and with the firm conducting the audit, being Jones, Cochenour and Company of Lancaster, Ohio. The audit report revealed no findings or recommendations.

17. Management and Maintenance: The PHA has been designated a *High Performer* with the U.S. Department of Housing and Urban Development as a result of scores attained in the *Public Housing Assessment Program (PHAS)* and the *Section 8 Management Assessment Program (SEMAP)* for the period ending 12/31/2004. The PHA received the following scores:

- PHAS 95%
- SEMAP 93%

18. Missions, Goals and Objectives:

- a. Provide decent, safe sanitary and affordable housing
 1. Continue to manage and maintain PHA properties consistent with current law and standards of high performance.
 2. Continue to manage and enforce program regulations for the Section 8 Housing Choice Voucher Program.
- b. Promote economic opportunity and self-sufficiency:
 1. Maintain cooperative agreements with local entities that provide the needed services that will further assist the family
 2. Participate and and/or research programs that promote economic opportunity and self-sufficiency.
- c. Endure equal opportunity housing:
 1. Provide housing opportunities to all qualified persons regardless of race, religion, creed or color.
- d. Promote adequate, affordable housing opportunities and increase those opportunities with available

resources:

1. Provide local preferences to encourage working families to apply and be admitted to housing programs.
 2. Provide local preferences to encourage working families currently housed to remain in place
 3. Permit a broad range of income in each housing development.
 4. Continue with modernization
 5. Research and apply for programs, grants, etc. that will improve current housing stock, services and/or housing opportunities.
- e. Continue with sound financial management for housing programs, marketing/outreach and good public relations.
- f. Strive to maintain the status of *high performer* in both the Public Housing and the Section 8 Housing Choice Voucher programs.