

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 2008

ANNUAL PLAN FY 2008

**HOUSING AUTHORITY OF THE CITY OF
FORT MYERS**

Fiscal Year beginning 04/01/2008

Submitted to HUD Dec 4 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: Housing Authority of the City of Fort Myers
PHA Number: FL047

PHA Fiscal Year Beginning: (mm/yyyy) 04/2008

PHA Programs Administered:

Public Housing and Section 8
 Section 8 Only
 Public Housing Only
 Number of public housing units: 621
 Number of S8 units:
 Number of public housing units:
 Number of S8 units: 1755 vouchers

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]

A. Mission

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

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

The Housing Authority of the City of Fort Myers, a professional housing management governmental corporation, owns, manages, develops and administers federal state and local housing and social programs for low, very low and moderate income families while successfully implementing national housing policies incorporating family self-sufficiency as a main component for transitioning families from welfare to work. The Authority's focus is twofold. It will work with the community to administer successful Section 8 voucher and project-based assisted housing programs. It will also work to change the face of public housing by transforming the most severely distressed public housing in Fort Myers from sources of urban blight to engines of urban renewal creating paradigm shifts in public housing culture, values and behavior through establishing positive incentives for resident self-sufficiency, providing comprehensive services that empower residents, while lessening concentrations of poverty, promoting mixed-income communities and assuring equal access to safe quality housing for low, very low and moderate income families throughout the community.

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) Increase Home Ownership Participation by five annually

- PHA Goal: Improve the quality of assisted housing
 - Objectives:
 - Improve public housing management: (PHAS score)
 - Improve voucher management: (SEMAP score)
 - Increase customer satisfaction:
 - Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections)
 - Develop a Vacancy Reduction Plan to report, track and provide funding for units damaged beyond normal repair and provide for cyclical painting
 - 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)
 - Expand Homeownership Program

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) Promote and Expand homeownership opportunities

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

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

Objectives:

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

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

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

Objectives:

- Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, 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)

NONE

**SUMMARY OF ACTIVITIES UNDERTAKEN DURING FY2007
TOWARD ACHIEVING HACFM GOALS & OBJECTIVES:**

I. Increase the availability of decent, safe, and affordable housing.

- Continue to implement the \$20 Million HUD HOPE VI grant to revitalize Public Housing that was awarded as follows:
 - Formalized contract with developer
 - Relocated Michigan Court residents
 - Demolition of Michigan Court began in July, 2007
- Continue to inspect PH units to develop costs & extent of needed renovations

- Renovated Public Housing to upgrade flooring with carpeting and vinyl in Southward and Palmetto
- Undertook Asset Management reevaluation of all developments
- Began site based wait lists for PH developments as part of Asset Management functions in conjunction with the HOPE VI plan
- Continue developing additional public/private partnerships for HOPE VI project
- Continue operating Horizons, purchased in Oct 2000 for fair market rental, providing 180 units.
- Maintained a High Occupancy Rate of Rental Units by:
 - Evaluating the success of using outside maintenance service contractors to supplement in-house efforts.
 - Continued active marketing of vacancies.
 - Revised Intake procedures to develop a Pre-App
 - Developed automated system for processing applications
 - Implemented flat rents
 - Developed a Vacancy Reduction Plan to earmark funding for repairs for units damaged beyond normal and cyclical painting
- Continue to administer the Section 8 program taken over from the City in late 2006 with 1533 vouchers and now the program has 1755 vouchers, a 15% increase
- Began utilizing the 300 relocation vouchers in connection with the HOPE VI program for Michigan Court and Flossie Riley units.

II. Improve community quality of life and economic vitality

- Community Service: Continue providing residents information on the program as mandatory. Held meetings posted notices throughout HACFM developments notifying residents of HUD regulations. Provided for the Resident Initiatives Coordinator of FMHA to attend all Resident Council Meetings and interact with residents to provide follow up and explain service requirements. Maintain records of resident service.
- Neighborhood Appearance: As in 2006, the HA continued City Trash pick up, providing larger containers for trash in an effort to improve neighborhood appearance. Stepped up enforcement of lease violations having to do with littering; improved perimeter lighting; and painted PH development exteriors to improve curb-appeal of properties.
- Safety: The HACFM continued to vigorously enforce evictions and stepped up lease violations to continue to ensure safety and security of residents.
- Quality of Life: Submitted and received HOPE VI grant. Also implemented Section 8 Homeownership Program.

III. Promote self-sufficiency and asset development of families and individuals

- Continue to link residents to services provided by outside agencies through Elderly Service Coordinator and through Family ROSS grant program
- Improved residents transportation needs by meeting with local transportation provider to tailor routes for PH residents
- Continued to provide opportunities for adult and juvenile education and development towards self-sufficiency for families through:
 - A. ROSS Elderly Service Coordinator (2001, 2002, 2003 & 2004 & FY 2005 & 2006)
 - B. ROSS Neighborhood Networks Grant – awarded two HUD NN Center grants – one in FY 2003 and one in FY 2006 for \$300,000 for an additional 3 years of operation.
 - C. ROSS Family Grant – awarded two HUD Ross Family Grants, one in FY 2004 and one for FY 2006 Family Homeownership Grant in the amount of \$250,000. Application was submitted to HUD for an FY 2007 grant in the amount of \$250,000.
- Maintain successful HUD certified PH FSS Program with 12 families enrolled currently
- Applied for and received FSS Coordinator Grants in 2005 and 2006 and applied for PH FSS Coordinator Grant in FY 2007
- Applied for Section 8 Family Self-Sufficiency Coordinator Grant in FY 2007
- Implemented Section 8 FSS Program that currently has 76 clients participating.
- Developed active FSS Task Force of Local Service Providers
- Continue to maintain information on file on local programs that promote resident self-sufficiency and linked these programs with residents

Annual PHA Plan
PHA Fiscal Year 2008
[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 (r)]

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

The Housing Authority has developed its Annual and 5 yr Plans to address affordable housing needs for low income residents of the City of Fort Myers by operating safe, secure housing and providing programs that support and encourage economic self-sufficiency opportunities for residents. As part of its planning, the Housing Authority developed and reviewed a set of goals and objectives which are designed to provide a comprehensive approach to accomplishing its overall mission. One facet of the Plan provides for an on-going review of all HACFM operations to improve service delivery, achieve maximum fiscal prudence and maximize revenue from both conventional and non-conventional sources. Another facet of the plan provides for managing existing and future assets to ensure a trend of increasing positive cash flow for the Housing Authority, which is significant in relation to HUD's reductions of Capital and Operating funding .

Since FY 2005, the HACFM has maintained the HUD "Elderly Only Designation" for three of its developments, Bonair Towers, Royal Palm Tower, and Flossie M. Riley Garden Apartments, granted in 2004.

The HACFM continues to follow all HUD mandates concerning involuntary resident participation in the Community Service Program. Residents are notified in meetings, by mail and by notices posted throughout the HA. Staff reports eligible residents service hours and maintains a listing of community activities for resident participation.

The HOPE VI grant in the amount of \$20 million awarded to the HACFM in October, 2005 involves public / private partnerships that reach out to all segments of the community. During 2006 and 2007, the HACFM addressed resident relocation, submitted the Community Supportive Services segment, and worked to formalize a contract with new developers to implement all facets of the HOPE VI Project. During 2007, Sec 8 vouchers were used to help relocate many residents and demolition began in July 2007 on Michigan Court.

In conjunction with Asset Management initiatives, the Public Housing waiting lists are now site based effective July, 2007.

The HACFM's certified Public Housing Family Self Sufficiency Program is highly successful. Currently 12 families are participating along with an active task force of local service partners. The HACFM applied for HUD ROSS (Resident Opportunity for Self Sufficiency) FSS Grants in 2005 & 2006 & 2007 to fund the Program Director's salary. 2005 & 2006 Grants were awarded and 2007 is pending. The HACFM was awarded a three year 2004 HUD ROSS Family grant to assist in funding the Family Self-Sufficiency program activities. A 2006 HUD ROSS application for an additional 3 year award in the amount of \$250,000 was awarded during 2007, and a 2007 grant was submitted for an additional 3 years.

The HACFM received a Neighborhood Network Center grant for Michigan Court to offer computer technology to residents and improve their path to self-sufficiency. The Center was serving approximately 1,000 residents per month during 2005 & 2006. The HACFM applied for and received a new FY 2006 Neighborhood Network Center Grant in the amount of \$300,000 for the new location in the Community Supportive Services (CSS) building in connection with the HOPE VI project.

During 2006 and 2007, the HACFM assumed implementation of the HUD Section 8 Voucher program. The program is up almost 15% from 1533 vouchers to 1755 in 2007. In addition, 300 Sec 8 relocation vouchers were utilized in conjunction with the HOPE VI project. Staff training, a Landlord Outreach Program and Program Auditing are HACFM priorities with a goal of fully utilizing vouchers. There are currently 76 voucher participants in the Section 8 FSS program.

Over the past four years, Average Unadjusted Income for HACFM's 3 family Public Housing developments rose from \$8668 in 2003 to \$8753 in 2004 to \$9538 in 2005 to \$10,811 in 2006. In 2007, with 2 family developments (i.e. Southward Village & Palmetto) only, the Average Unadjusted Income is \$11,260. Both family developments fall within the HUD guidelines for Income Deconcentration.

During 2007, the percentage of extremely low-income families on the Public Housing family site based waiting lists dropped slightly from 89% in 2006 to 84%. The number of families with children on the PH wait lists dropped from a high of 83% in 2006 to 70%, still higher than the 58% it was on the 2005 waiting list.

In the coming year, the HACFM will continue to work with the community to implement the HOPE VI project; will focus on expanding and improving the Section 8 Voucher Program; will ensure on-going tenant file auditing, and will continue focusing on increasing resident involvement, providing safety and security, and improving neighborhood appearance. Operationally, the HACFM will continue as well to review all operations and establish viable options in an effort to manage existing and future assets with an overall goal of self-sufficiency.

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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

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Attachments

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

Required Attachments:

- Admissions Policy for Deconcentration – Included under Section 3
- FY 2008 Capital Fund Program Annual Statement – fl047a01
- 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 – Included under Section 18
- List of Resident Board Member – Included under Section 18
- Community Service Description of Implementation - Included in Section 12
- Information on Pet Policy – Included under Section 14
- Section 8 Homeownership Capacity Statement, if applicable – Included in Section 11
- Description of Homeownership Programs, if applicable – Included in Section 11

Optional Attachments:

- PHA Management Organizational Chart
- FY 2008 Capital Fund Program 5 Year Action Plan – Attachment fl047a01
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text) **Included under Section 18 A, Pages 54 - 56.**
- Other (List below, providing each attachment name)
Project-Based Voucher Program – Included in Section 11

Supporting Documents Available for Review

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing	5 Year and Annual Plans

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	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.	
X	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
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
X	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
X	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
X	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
X	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
X	Policies governing any Section 8 Homeownership program <input checked="" type="checkbox"/> 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
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
	The most recent Public Housing Drug Elimination Program (PHDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)
X	Resident Advisory Board Comments on FY 2008 An Plan	Annual Plan Sec 18 A

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 – City of Fort Myers, Florida							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	2098	5	5	N/A	N/A	N/A	N/A
Income >30% but <=50% of AMI	1506	5	5	N/A	N/A	N/A	N/A
Income >50% but <80% of AMI	1459	4	4	N/A	N/A	N/A	N/A
Elderly	665	5	5	N/A	N/A	N/A	N/A
Families with Disabilities	585			N/A	N/A	N/A	N/A
Race/Ethnicity White/Non Hispanic	2772	5	5	N/A	N/A	N/A	N/A
Race/Ethnicity Black/Non Hispanic	1844	5	5	N/A	N/A	N/A	N/A
Race/Ethnicity Hispanic	955	5	5	N/A	N/A	N/A	N/A
Race/Ethnicity							

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

- Consolidated Plan of the Jurisdiction/s
Indicate year:
- U.S. Census data: the Comprehensive Housing Affordability Strategy (“CHAS”) dataset **Data as of 2000**
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input checked="" type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction: PALMETTO COURT			
Palmetto Court	# of families	% of total families	Annual Turnover
Waiting list total	59		12
Extremely low income <=30% AMI	51	86%	
Very low income (>30% but <=50% AMI)	7	12%	
Low income (>50% but <80% AMI)	1	2%	
Families with children	40	68%	
Elderly families	4	7%	
Families with Disabilities	0	0%	
Race/ethnicity White	29	49%	
Race/ethnicity Black	30	51%	
Race/ethnicity			
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	18	30%	
2 BR	20	34%	
3 BR	17	29%	
4 BR	4	7%	
5 BR			
5+ BR			

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: **SOUTHWARD VILLAGE**

Southward Village	# of families	% of total families	Annual Turnover
Waiting list total	118		21
Extremely low income <=30% AMI	98	83%	
Very low income (>30% but <=50% AMI)	17	14%	
Low income (>50% but <80% AMI)	3	3%	
Families with children	86	73%	
Elderly families	7	6%	
Families with Disabilities			
Race/ethnicity White European/American	38	32%	
Race/ethnicity Black African American	78	66%	
Race/ethnicity American Indian/ Alaska Native	2	2%	
Race/ethnicity Other	0	0%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	29	25%	
2 BR	49	42%	
3 BR	34	29%	
4 BR	6	5%	
5 BR			

Housing Needs of Families on the Waiting List			
5+ BR			
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input checked="" type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction: ROYAL PALM (ELDERLY)			
Royal Palm	# of families	% of total families	Annual Turnover
Waiting list total	24		5
Extremely low income <=30% AMI	17	71%	
Very low income (>30% but <=50% AMI)	5	21%	
Low income (>50% but <80% AMI)	2	8%	
Families with children	1	4%	
Elderly families	23	96%	
Families with Disabilities	0	0%	
Race/ethnicity White	21	88%	
Race/ethnicity Black	2	8%	
Race/ethnicity American Indian/ Alaska Native	1	4%	
Race/ethnicity			

Housing Needs of Families on the Waiting List			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	24	100%	
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes: How long has it been closed (# of months)? Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Housing Needs of Families on the Waiting List			
Waiting list type: (select one) <input type="checkbox"/> Section 8 tenant-based assistance <input type="checkbox"/> Public Housing <input type="checkbox"/> Combined Section 8 and Public Housing <input checked="" type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional) If used, identify which development/subjurisdiction: BONAIR TOWERS (ELDERLY)			
Bonair Towers	# of families	% of total families	Annual Turnover
Waiting list total	42		12
Extremely low income <=30% AMI	28	67%	
Very low income (>30% but <=50% AMI)	10	24%	
Low income (>50% but <80% AMI)	4	10%	
Families with children	1	2%	

Housing Needs of Families on the Waiting List			
Elderly families	41	98%	
Families with Disabilities	0	0%	
Race/ethnicity White European/American	33	79%	
Race/ethnicity Black African American	8	19%	
Race/ethnicity American Indian/ Alaska Native	1	2%	
Race/ethnicity Other	0	0%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	38	90%	
2 BR	4	10%	
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

Housing Needs of Families on the Waiting List	
Waiting list type: (select one)	
<input checked="" type="checkbox"/>	Section 8 tenant-based assistance
<input type="checkbox"/>	Public Housing
<input type="checkbox"/>	Combined Section 8 and Public Housing
<input type="checkbox"/>	Public Housing Site-Based or sub-jurisdictional waiting list (optional)
If used, identify which development/subjurisdiction:	

Housing Needs of Families on the Waiting List			
Section 8 Tenant Based	# of families	% of total families	Annual Turnover
Waiting list total	698		350
Extremely low income <=30% AMI	371	48%	
Very low income (>30% but <=50% AMI)	277	40%	
Low income (>50% but <80% AMI)	50	7%	
Families with children	557	80%	
Elderly families	76	11%	
Families with Disabilities	65	9%	
<u>Race/ethnicity</u> (white)	336	48%	
<u>Race/ethnicity</u> (Black)	354	51%	
<u>Race/ethnicity</u> (Mixed)	5	1%	
<u>Race/ethnicity</u> (Hispanic)	156	22%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			

Housing Needs of Families on the Waiting List

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

If yes:

How long has it been closed (# of months)? 11 Months (Nov, 2006)

Does the PHA expect to reopen the list in the PHA Plan year? No Yes –
In Jan or Feb 2008.

Does the PHA permit specific categories of families onto the waiting list, even if
generally closed? No Yes – Victims of Hate Reprisals or Victims of
Disaster area as a result of Hurricanes or fire.

C. Strategy for Addressing Needs

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

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

Select all that apply

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

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select all that apply

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

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

- Seek designation of public housing for the elderly
- Apply for special-purpose vouchers targeted to the elderly, should they become available
- Other: (list below)

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)
 - The Housing Authority actively cooperates with the City of Fort Myers in efforts to remove impediments to fair housing choice.
 - Promote Fair Housing through seminars, training, posters and pamphlets

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

Need: Relocate residents living in Public Housing Flossie M. Riley and Michigan Court affected in the HOPE VI revitalization Plan.

Strategy 1: Utilize 300 Sec 8 relocation vouchers for resident relocation in connection with the HOPE VI revitalization plan.

(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) Considerations connected with the HACFM HUD approved HOPE VI Plan being implemented.

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 2007 grants)		
a) Public Housing Operating Fund	3,100,000	
b) Public Housing Capital Fund	988,126	
c) HOPE VI Revitalization	2,500,000	
d) HOPE VI Demolition	1,600,000	
e) Annual Contributions for Section 8 Tenant-Based Assistance	7,500,000	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants	305,000	
h) Community Development Block Grant		

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
i) HOME		
Other Federal Grants (list below)		
2. Prior Year Federal Grants (unobligated funds only) (list below)		
CFP FFY 2007	1,665,019	
CFPFY 2006	1,150,000	
3. Public Housing Dwelling Rental Income	1,120,757	
4. Other income (list below)		
4. Non-federal sources (list below)		
Total resources	19,928,902	

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 the time of 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)

- c. Yes No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- d. Yes No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- e. Yes No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

(2)Waiting List Organization

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

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

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

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

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

1. How many site-based waiting lists will the PHA operate in the coming year?⁴

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? **4**

The lists were implemented as part of the HACFM Asset Management program in conjunction with the HOPE VI project.

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

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)

**Assessment of Site-Based Waiting List Development
Demographic Characteristics**

Development Information: (Name, Number, Location)	Date Initiated	Initial Mix of Racial, Ethnic or Disability Demographics	Current Mix of Ethnic or Disability Demographics since Initiation of SBWL	Percent change between Initial and current mix of Racial, Ethnic or Disability Demographics
Southward Village FL 047-001	07/01/2007	14% White 86% Black 11% Hispanic 89% non-Hispanic		
Bonair Towers FL047-002	04/01/2007	79% White 19% Black 2% American Indian/ Alaska Native 47% Hispanic 53% non-Hispanic		
Palmetto Court FL047-003	07/01/2007	16% White 84% Black 15% Hispanic 85% non-Hispanic		
Royal Palm Towers FL047-004	04/01/2007	88% White 8% Black 4% American Indian/Alaska Native 41% Hispanic 59% non-Hispanic		

NOTE: HACFM is implementing Site Based waiting lists for the above properties during FY 2008 and will provide an assessment in future Plans of the changes in racial, ethnic or disability-related resident composition at each applicable PHA site based upon the MTCS occupancy data.

(3) Assignment

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

- One
- Two
- Three or More

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

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

(4) Admissions Preferences

a. Income targeting:

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

b. Transfer policies:

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

- Emergencies
- Overhoused
- Underhoused
- Medical justification
- Administrative reasons determined by the PHA (e.g., to permit modernization work)
- Resident choice: (state circumstances below)
- Other: (list below) **The HACFM has a policy on transfers**

c. Preferences

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

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

Former Federal preferences:

- Involuntary Displacement (Disaster, Government Action, Action of Housing

- Owner, Inaccessibility, Property Disposition)
- Victims of domestic violence
- Substandard housing
- Homelessness
- High rent burden (rent is > 50 percent of income)

Other preferences: (select below)

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

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

1 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

- 2 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

Yes No: Does the PHA have any general occupancy (family) public housing developments covered by the deconcentration rule? If no, this section is complete. If yes, continue to the next question.

Yes No: Do any of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments? If no, this section is complete. If yes, list these developments on the following table:

Development Name:	Number of Units	Explanation (if any) (See Step 4 at '903.2 (c) (1) (iv))	Deconcentration Policy (if no explanation) (see Step 5 at '903.2 (c) (1) (v))
None apply			

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)

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

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

- Additional affirmative marketing
- Actions to improve the marketability of certain developments
- Adoption or adjustment of ceiling rents for certain developments
- Adoption of rent incentives to encourage deconcentration of poverty and income-mixing
- Other (list below)

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

- Not applicable: results of analysis did not indicate a need for such efforts
- List (any applicable) developments below:

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:

DECONCENTRATION OF POVERTY AND INCOME-MIXING

The HACFM has site based waiting list for all public housing developments except for Flossie M. Riley Garden Apartments designated for the elderly which is slated for demolition and the waiting list has been discontinued.

Gross annual income is used for income limits at admission and for income-mixing purposes.

Skipping of a family on the waiting list specifically to reach another family with a lower or higher income is not to be considered an adverse action to the family. Skipping can be applied within developments until the target threshold is met.

The PHA uses gathered tenant income information in its assessment of public housing developments to determine the appropriate designation to be assigned to the project for the purpose of assisting the HACFM in its deconcentration goals.

Deconcentration and Income-Mixing Goals

Admission policies related to the deconcentration efforts of the HACFM do not impose specific quotas. Therefore, the HACFM will not set specific quotas, but will strive to achieve deconcentration and income-mixing in its developments through evaluation of income per development and skipping of a family on a waiting list if necessary to reach another family with a higher or lower income in its site based lists.

Project Designation Methodology

The HACFM determines and compares tenant incomes at all of its family PH developments. On analyzing its findings, the HACFM will apply the policies, measures and incentives listed herein to bring higher income families into lower income developments and lower income families into higher income developments.

Our goal is to have eligible families with higher incomes occupy dwelling units in projects occupied predominantly by eligible families having lower incomes, and eligible families with lower incomes occupy dwelling units in projects predominantly occupied by eligible families having higher incomes. The waiting list statistics indicate there are sufficient extremely low income and very low income persons to balance incomes in developments designated higher income developments.

The HACFM uses the “Aggregate Average Method” to achieve its deconcentration objectives. Resident income is reviewed annually. Using the incomes of all families in all developments as a baseline, the HACFM then determines the average income of all of its resident families, by development. This information is kept on file in the HACFM. The HACFM will designate higher income developments those with average income

above the aggregate average, and will designate lower income developments those with average income below the aggregate average.

The Housing Authority of the City of Fort Myers has currently 2 PH family developments, namely Southward Village and Palmetto Court.

The average unadjusted income for these two HACFM Public Housing family developments is \$11,260, up from 2006's \$10,811. The average unadjusted income for Southward compares at 97% and Palmetto compares at 103%. Both developments are well within the HUD guidelines.

# UNITS	DEV.	PERCENT	AVERAGE INCOME
199	Southward	97%	\$10,924
99	Palmetto	103%	\$11,596
398	Total Avg. Unadjusted Income	\$11,260	

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)
- 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) **Information from a tenant file will be released to a prospective landlord upon receipt of a written request from the landlord.**

(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: **Families that submit a “Written Request for Extension” prior to their first 60 day expiration will be granted.**

(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) – Victims of Federally declared disaster areas
- Other preference(s) (list below) – {30% of AMI

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)

- 4 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
- 3 Victims of reprisals or hate crimes
- 1 Other preference(s) (list below) – Victims of Federally declared disaster areas
- 2 Other preference(s) (list below) – {30% of AMI

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)

Community Based Media

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:

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

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

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

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

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

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

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

e. Ceiling rents

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

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

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

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

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

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

f. Rent re-determinations:

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

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

g. Yes No: Does the PHA plan to implement individual savings accounts for residents (ISAs) as an alternative to the required 12 month disallowance of earned income and phasing in of rent increases in the next year?

(2) Flat Rents

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

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

B. Section 8 Tenant-Based Assistance

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

(1) Payment Standards

Describe the voucher payment standards and policies.

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

- At or above 90% but below 100% of FMR
- 100% of FMR
- Above 100% but at or below 110% of FMR
- Above 110% of FMR (if HUD approved; describe circumstances below)

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

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

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

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

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

- Annually
- Other (list below)

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

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

(2) Minimum Rent

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

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

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

5. Operations and Management

[24 CFR Part 903.7 9 (e)]

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

A. PHA Management Structure

Describe the PHA's management structure and organization.

(select one)

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

The HACFM is governed by a 7 member board appointed by the Mayor of the City of Fort Myers. The Board hires a full-time executive director who manages the Authority's day to day operations with a qualified staff.

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	616	50 - 100
Section 8 Vouchers	1755	350
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers (list individually)	300 relocation vouchers	300
Public Housing Drug Elimination Program (PHDEP)		
Other Federal Programs(list individually)		

FSS Program PH	12 Families	5-8 families
FSS Program Sec 8	76 Families	5-8 families
Capital Fund Program	616 Units	50 – 100 Units
Ross Elderly Service Coordinator Program	322 Units	90 Units
ROSS Neighborhood Network Ctr Program	300-350 Unduplicated	300-400
ROSS Family Program	75	3-40

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)

HACFM Admissions and Occupancy Policy Manual

HACFM Maintenance Policy

Utility Study

(2) Section 8 Management: (list below)

HACFM Section 8 Administrative Plan

Landlord Outreach Program

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) fl047a01

-or-

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

(2) Optional 5-Year Action Plan

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

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

b. If yes to question a, select one:

The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state name fl047a01

-or-

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

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

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

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

1. Development name: **Michigan Court / Flossie M. Riley Garden Apts.**

2. Development (project) number: **FL 047 -006**

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:

New construction as part of HOPE VI for Michigan Court and Flossie M. Riley Garden Apartments; and from affordable housing rental tax credit for all public housing developments

- 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:
Royal Palm Towers

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:	ROYAL PALM TOWERS
1b. Development (project) number:	FL047 004
2. Activity type:	Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one)	Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date application approved, submitted, or planned for submission:	<u>(30/09/07)</u>
5. Number of units affected:	101
6. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity:	a. Actual or projected start date of activity: 01/08 b. Projected end date of activity: 01/09

Demolition/Disposition Activity Description	
1a. Development name:	Michigan Court / Flossie Riley Garden Apts.
1b. Development (project) number:	FL 047-006
2. Activity type:	Demolition <input checked="" type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one)	Approved <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission:	<u>(27/10/05)</u>
5. Number of units affected:	470
6. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity:	a. Actual or projected start date of activity: 07/07 b. Projected end date of activity: 06/08

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: BONAIR TOWERS 1b. Development (project) number: f1047-002
2. Designation type: Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA’s Designation Plan <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <u>(27/01/03)</u>
5. If approved, will this designation constitute a (select one) <input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected: 101 7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

Designation of Public Housing Activity Description
1a. Development name: ROYAL PALM TOWERS 1b. Development (project) number: f1047-004
2. Designation type: Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA’s Designation Plan <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <u>(27/01/03)</u>
5. If approved, will this designation constitute a (select one) <input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected: 101 7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

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Designation of Public Housing Activity Description
1a. Development name: FLOSSIE M.RILEY GARDEN APARTMENTS
1b. Development (project) number: FL047-006
2. Designation type: Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA's Designation Plan <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <u>(27/01/03)</u>
5. If approved, will this designation constitute a (select one) <input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
7. Number of units affected: 120
7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

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

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

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

2. Activity Description

Yes No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing

Asset Management Table? If “yes”, skip to component 11. If “No”, complete the Activity Description table below.

Conversion of Public Housing Activity Description	
1a. Development name:	
1b. Development (project) number:	
2. What is the status of the required assessment?	<input type="checkbox"/> Assessment underway <input type="checkbox"/> Assessment results submitted to HUD <input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question) <input type="checkbox"/> Other (explain below)
3. <input type="checkbox"/> Yes <input type="checkbox"/> No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to block 5.)	
4. Status of Conversion Plan (select the statement that best describes the current status)	<input type="checkbox"/> Conversion Plan in development <input type="checkbox"/> Conversion Plan submitted to HUD on: (DD/MM/YYYY) <input type="checkbox"/> Conversion Plan approved by HUD on: (DD/MM/YYYY) <input type="checkbox"/> Activities pursuant to HUD-approved Conversion Plan underway
5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one)	<input type="checkbox"/> Units addressed in a pending or approved demolition application (date submitted or approved: _____) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: _____) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: _____) <input type="checkbox"/> Requirements no longer applicable: vacancy rates are less than 10 percent <input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units <input type="checkbox"/> Other: (describe below)

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

Voluntary Conversion Initial Assessments

- a. How many of the PHA’s developments are subject to the Required Initial Assessments? **2**
- b. How many of the PHA’s developments are not subject to the Required Initial Assessments based on exemptions (e.g., elderly and/or disabled development not general occupancy projects)? **3**

- c. How many Assessments were conducted for the PHA's covered developments?
2
- d. Identify PHA developments that may be appropriate for conversion based on the Required Initial Assessments:
None were identified at this time as appropriate for conversion without additional upgrading of the facilities to render them market comparable.

Development Name	Number of Units
None	

- e. If the PHA has not completed the Required Initial Assessments, describe the status of these assessments.
The two completed assessments are on file at the HACFM main office.

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.)

NOTE: As part of a HOPE VI application approved in October, 2005, the HACFM is contemplating administering a Public Housing Homeownership Program in Michigan Court and Flossie M. Riley.

2. Activity Description

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

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

B. Section 8 Tenant Based Assistance

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

2. Program Description:

a. Size of Program

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

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

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

b. PHA-established eligibility criteria

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

If yes, list criteria below: **Must graduate from the FSS Program**

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

1. **Continue to market the program to lenders, realtors and developers**
2. **Continue to offer home buyer education**
3. **Continue to recruit and prepare Section 8 participants for home ownership**

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

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

- a. Establishing a minimum homeowner down-payment requirement of at least 3 percent of purchase price and requiring that at least 1 percent of the purchase price comes from the family's resources.
- b. Requiring that financing for purchase of a home under its Section 8 homeownership will be provided, insured or guaranteed by the state or Federal government; comply with secondary mortgage market underwriting requirements; or comply with generally accepted private sector underwriting standards.
- c. Partnering with a qualified agency or agencies to administer the program (list name(s) and years of experience below).
- d. Demonstrating that it has other relevant experience (list experience below).
1. **Qualified staff and finance department**
 2. **Partners through a HUD HOPE VI grant who operate HUD Certified Home Buyer Education Programs**

3. **Partners through HUD ROSS NNC and Family Homeownership Grant applications who operate HUD Certified Home Buyer Education Programs, including local banks and real estate agencies.**

Project-Based Voucher Program

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

b. Yes No Are there circumstances indicating that the project basing of the units, rather than tenant-basing of the same amount of assistance is an appropriate option?

If yes, check which circumstances apply:

Low utilization rate for vouchers due to lack of suitable rental units

Access to neighborhoods outside of high poverty areas

Other (describe below:)

20% of non-elderly vouchers will be project-based in conjunction with the Hope VI tenant relocation efforts.

d. Indicate the number of units and general location of units (e.g. eligible census tracts or smaller areas within eligible census tracts):

20% of 300 non-elderly relocation vouchers will be project based into eligible census tracts.

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (1)]

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

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

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

If yes, what was the date that agreement was signed? 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)
<i>Elderly Services Coordinator</i>	<i>322</i>	<i>All elderly Public</i>	<i>On site, full time</i>	<i>Public Housing</i>

		<i>Housing residents</i>	<i>coordinator</i>	<i>participants</i>
<i>Neighborhood Network Center</i>	<i>300-350 non-duplicated residents</i>	<i>1) Open to all residents all ages at certain times; 2) After school homework assistance; and 3) Meet education & Training Selection Criteria</i>	<i>NN Center</i>	<i>Public Housing Residents</i>
<i>ROSS Family Program</i>	<i>75 families</i>	<i>Specific Criteria as provided in Grant program activities</i>	<i>NNCenter & Other Providers</i>	<i>Public Housing residents</i>

(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: 30/08/07)
Public Housing	30 approved slots	12 families
Section 8	100 approved slots	76 families

- 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

COMMUNITY SERVICE PROGRAM IMPLEMENTATION

During FY 2007, the Housing Authority of the City of Fort Myers continued to implement the current HUD requirements of the Community Service program as follows:

IN-HOUSE PROGRAM DEVELOPMENT AND STAFF TRAINING

- Held training classes for staff, including Development Managers, to review HUD regulations on involuntary eligible resident participation in the program. Trained staff how to respond to questions from residents.
- Drafted and posted appropriate Public Notices on the regulations concerning the Community Service Program to inform all Residents throughout the Housing Authority developments.
- Placed the item on the agenda of Resident Council Meetings to give residents an opportunity to review HUD regulations making the program non-voluntary.
- Provided tracking of service for participating residents.
- Maintained an internal filing system and reporting system so Housing Managers can regularly track and verify completion of any community service programs by residents who must participate in the program.
- Maintained a listing from the Volunteer Center of Lee County of non-profits in the Fort Myers area who are willing to participate in offering community service activities to residents who participate. The Senior Friendship Centers of Lee County and the United Way of Lee County also assist participating residents.
- Reviewed the lease to ensure compliance with CS requirements.
- Prepared an annual update article on the Community Service Program for the Newsletter to keep residents informed about the program.

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)

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

Palmetto Court, and Southward Village

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)

PHAS Component # 4 – Drug Prevention and/or Crime Reduction Program Goals

Goal # 1 To Provide on-site drug prevention programming for children 6-18 years of age for one year.

- Task # 1 The Boys and Girls Clubs of Lee County, Inc. will provide summer camp programming that includes drug prevention programming for 30 children from the ages of 7-16. Registration List will be used for confirmation of participation.
- Task # 2 Girl Power
- Task # 3 Kids Correct
- Task # 4 Youth Sports Program

Goal # 2 To provide drug prevention programming for adults for one year.

- Task # 1 Implementation of “Dare to be You” which is a 12 week course that provides science based prevention programming that will increase parental efficiency; increase nurturing family management styles; increase social support systems; increase self-sufficiency; increase the knowledge of child development; increase the parents’ ability to provide the environment to develop self-concept, self-responsibility, communication and problem solving skills in their children. The program will serve 12-15 families. Pre and post enrollment testing as per the DARE Curriculum will be used for evaluation of program achievement.
- Task # 2 Mommie and Me

Goal # 3 To encourage residents to participate in crime prevention strategies undertaken by the Housing Authority

- Task # 1 To work with the crime practitioner at the Fort Myers Housing Authority to set up a neighborhood watch program at Flossie Riley and Palm Towers.

Goal # 4 To implement on-site community policing strategies to facilitate crime reduction at all public housing developments.

- Task # 1 The lease enforcement staff and property managers will fill out a form that will be required for each incident. The forms will be submitted to the Director of Housing on a weekly basis by no later than Monday afternoon from the previous week.
- Task # 2 The Fort Myers Police Department contracted staff and all property managers will meet on a monthly basis to discuss crime at each development. Meeting notes will be taken. The meeting will occur the 2nd Thursday of every month.
- Task # 3 Implementation of the Policeman next door program. 2 officers will live on-site at any of the public housing developments per year. Documentation will be the Courtesy Officer Agreement kept on file by the housing director.
- Task # 4 The Fort Myers Police Department contracted Police Officers attend the Resident Association meetings on a monthly basis. The sign-in sheet will be used as documentation of police officer attendance. Resident Association meetings are held once a month for each resident association.
- The Fort Myers Police Department liaison will provide to the Housing Director on a monthly basis the calls for service from the previous month. The Fort

Myers Police Department will provide the data no later than the 15th of the subsequent month.

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

All Public Housing Developments are affected.

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)

All Public Housing Developments are affected

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.

PHDEP NO LONGER APPLIES

- 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)]

The FMHA has adopted a pet policy covering all units, elderly and family. The policy (Section 18) is on file at the main office of the housing authority and does not apply to pets that are used to assist persons with disabilities. A summary of the main aspects of the policy are as follows:

- Pets are limited to domesticated dogs, cats, birds and fish in aquariums. The Housing Authority reserves the right to limit size and number. Animals deemed to be potentially harmful to health or safety of others will not be allowed (including attack or fight trained dogs – pit bulls). Residents in all units must register pets with the Community Services Bureau by submitting a Pet Registration Form with a photo of the pet. Owners must provide records to the Property Managers that pet is properly inoculated and licensed and also provide name and phone number of individual who will be responsible for the pet in event of resident absence or illness.
- A non-refundable security deposit of \$100 is required for elderly facilities. A non-refundable security deposit of \$250 is required for family developments, along with verification of a liability insurance policy covering the pet at time of registering the pet.
- Owners are liable for amount of all damages to FMHA caused by their pet.
Owners shall be liable for entire amount of injury to person or property of other residents, staff or visitors caused by their pet and shall indemnify FMHA for all cost of litigation and attorney's fees resulting from damage.
- Owners must maintain pets in living quarters in manner to prevent odors and other unsanitary conditions in owner's unit and surrounding areas.
- Complaints regarding pets disturbing neighbors will result in owner having to remove the pet or owner eviction.
- Owners must keep pets in owner's apartment or on leash at all times when outside. No outdoor cages are allowed.
- Pets are allowed only on designated pet areas on the grounds. Owners must clean up after their pets and are responsible for disposing of pet waste. Animals are not allowed in common rooms or dining rooms and should be carried if possible in elevators.
- Pets cannot be left unattended on a lease connected to clotheslines, poles or any object outdoors.
- If work is to be done in a pet owners unit, the owner must either be home or arrange for pet to be contained or removed from the unit.

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? 03/31/05
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)
 Provided below:

Housing Authority of the City of Fort Myers Resident Advisory Board Meeting
Minutes - November 8, 2007 10:00 A.M.

The meeting was called to order at 10:15 A.M. in attendance was Vivian Watkins Director of Resident Services, Sherri Campanale Director of Housing and Maintenance, Jeanne Dufresne Procurement Officer, Barbara Hall Flossie Riley RAB member, Carl Harper Palmetto Court RAB Member, Donald Blaney Treasurer for Bonair Towers Resident Council, and Edward Janowski Royal Palm Towers RAB Member.

Purpose of Meeting: The RAB meeting was held with the presidents and/or representatives to discuss their input, and any testimonies into the development of the annual plan. Advised the RAB HUD back in 1999 established the Annual Plan format and it is to be submitted annually mid January. In addition there were two major events to take place at HACFM, the HOPE VI Revitalization project and the Section 8 program was placed under the leadership of the Executive Director Mr. Marcus Goodson at HACFM. Each member was asked for a written list of items from their developments and any other comments concerning the annual plan would be taken into consideration.

Bonair Towers Annual Plan input concerning this property - Items requested:

Replace the windows: This was included in our five-year plan however HACFM is working on a grant to assist with the cost of replacing the windows at Bonair Towers. Mr. Patrick Marchese is the newly elected president of the Bonair Towers, as of (November 5). He called a special meeting on November 9, 2007 to get residents input regarding the annual plan. The residents would like to have repairs done to the laundry room because of the wiring. In addition would like washers and dryers on each floor. Paint the Bonair Towers Development.

Flossie Riley Garden Apartments Annual Plan input concerning this property - Items requested:

Sherri Campanale Director of Housing and Maintenance and Jeanne Dufresne, Procurement Officer was in attendance at this meeting. Sherri requested Jeanne to take note of the requests listed below and she will follow-up on these items. Take off the screen doors at all units in Flossie Riley. Paint the chairs/and or benches in the outside lobby area. Need new Potts for cigarette butts, the old potts are falling apart. Need new trash can in Flossie Riley Community areas.

Palmetto Court Annual plan input concerning this property - Items requested:

The Palmetto Court development did not have any major input, items they inquired about are already included in the annual plan. The installation of new vanity cabinets in all units at Palmetto Court is already included in the annual plan. The installation of new windows have already received bids and job to be contracted out.

Royal Palm Towers Annual plan input concerning this property - Items requested:

Adjust the bricks around gardens and weed then mulch all gardens. Take out palms broken off and dead, remove bricks and sod over in front of building. Clean all drapes in lobby and lunchroom areas. Better lighting in the parking lot needed. – This job has already been contracted. Screened in patio with solid roof for shade to sit outside and it should have fans and lights, tables, chairs, ashtrays with one long table for serving goodies. This would be an outside lunchroom, meeting room, or just a plain lounge/party room.

Remove mold in front of building where the water drips from the air conditioner. – This has already been contracted out. Shape all bushes in front of the building. Need a new rope for flagpole and/or new flagpole. – Sherri Campanale requested Jeanne Dufresne to follow-up on this request. Plants are coming out of old potted plan holder, need new potted plant holder to replace old.

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) **Appointed by Mayor of City of Fort Myers**

b. Eligible candidates: (select one)

- Any recipient of PHA assistance
- Any head of household receiving PHA assistance
- Any adult recipient of PHA assistance
- Any adult member of a resident or assisted family organization
- Other (list)

c. Eligible voters: (select all that apply)

- All adult recipients of PHA assistance (public housing and section 8 tenant-based assistance)
- Representatives of all PHA resident and assisted family organizations
- Other (list)

C. Statement of Consistency with the Consolidated Plan

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

1. Consolidated Plan jurisdiction: (provide name here) **City of Fort Myers, FL**
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)

4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below) **The Consolidated Plan supports the PHA Plan by signing off on consistency with all Federal grants and by inviting PHA participation in planning process. The Consolidated Plan provides assistance down payment and closing cost assistance to families participating in the Housing Choice Voucher Program.**

D. Other Information Required by HUD

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

1. Amendment and Deviation Definitions

24 CFR Part 903.7(r)

PHAs are required to define and adopt their own standards of substantial deviation from the 5-year Plan and Significant Amendment to the Annual Plan. The definition of significant amendment is important because it defines when the PHA will subject a change to the policies or activities described in the Annual Plan to full public hearing and HUD review before implementation.

In accordance with PIH notice 99-51 (HA) issued December 14, 1999, PHA's must define "substantial deviation" of Annual Plans from the 5-Year Plan and "significant amendment or modification" of the Annual Plan. The Quality Housing and Work Responsibility Act of 1998 requires that PHA's explain "substantial deviation" from the 5-Year Plan in their Annual Plans. The Act also provides that, while PHAs may change or modify their plans or policies described in them, any "significant deviation" to the plan would require PHAs to submit a revised PHA plan that has met full public process requirements.

The Housing Authority of the City of Fort Myers' definition of "substantial deviation" of Annual Plans from the 5-Year Plan and "significant amendment or modification" of the Annual Plan will consider the following to be significant amendments or modifications:

CRITERIA FOR DETERMINING SUBSTANTIAL DEVIATION AND SIGNIFICANT AMENDMENT OR MODIFICATION:

Substantial Deviation:

The Housing Authority of the City of Fort Myers, after submitting its Annual Plan to HUD, may modify, amend or change any policy, rule, regulation or other aspect of its plan. If any modifications, amendments or changes in any policy, rule, regulation or other aspect of the plan are not inconsistent with the Housing Authority of the City of Fort Myers' Mission Statement, its Goals and Objectives, or HUD regulations, then these shall not be deemed significant amendments or modifications to the Annual and 5-Year Plan. If new program activities are required or adopted to reflect changes in HUD regulations or as a result of national or local emergencies, these activities are exempted actions and will not be considered as Substantial Deviation from the 5-year Plan.

- If any new program activities undertaken do not otherwise further the Housing Authority of the City of Fort Myers's Mission Statement and Goals and Objectives, then such activities may be considered a substantial deviation from the 5-Year Plan.
- If there is insufficient budget authority from HUD necessitating the need to alter, reduce or terminate any specific program activity, this change in activity may be considered a Substantial Deviation, depending upon whether the change in activity reflects an overall change in the direction of the Housing Authority's goals and objectives.

Significant Amendment/Modification:

- A change in policy pertaining to the operation of the Housing Authority relating to major strategies to address housing needs and to major policies governing eligibility, selection or admissions and rent determination will be considered Significant Amendments or Modifications. All significant modifications require full public process.
- New program activities that are required or adopted to reflect changes in HUD regulations or are implemented due to national or local emergencies are Exempted actions and will not be considered Substantial Amendments or Modifications to the 5 year or Annual Plan.

- The HA may set funds in a line item where there were none. New work items (excluding Emergency Work items) that are not included in the CFP and that cumulatively exceed 10% of the fiscal year's CFP (\$150,000), may be considered Significant Amendments or Modifications.
- Changes in use of the replacement reserve under the CFP may be considered Significant Amendments or modifications.
- Demolition and or/disposition activities, new or amended development plans, designation or conversion actions not currently identified in the 5-year plan may be considered Significant Amendments or Modifications.

2. Current Listing of the Board of Commissioners of the Housing Authority of the City of Fort Myers

<u>Commissioner</u>	<u>Appointed</u>	<u>Term Ends</u>
Lemuel Teal, Chairman 4224 Michigan Avenue Fort Myers, FL 33916	04/01/01 3/6/2007	03/06/03 3/6/2011
Bill Barnwell, Vice-Chairman 4224 Michigan Ave Fort Myers, FL 33916	04/02/01 6/6/2005	06/06/05 6/6/2009
Peter Routsis-Arroyo, Commissioner 4224 Michigan Avenue Fort Myers, FL 33916	04/01/01 3/6/2006	03/06/02 3/6/2010
Joseph D'Alessandro, Commissioner 4224 Michigan Avenue Fort Myers, FL 33916	09/15/03 3/6/2007	03/06/07 3/6/2011
Betty Cole McDonald, Commissioner H.A. Resident 4224 Michigan Avenue Fort Myers, FL 33916	04/01/01 3/6/2005	03/06/05 3/6/2009 Resigned 10/24/07
E. Bruce Strayhorn, Commissioner Strayhorn & Strayhorn 4224 Michigan Avenue Fort Myers, FL 33916	03-07-98 3/6/2006	03-06-02 3/6/2010
Dionne Carter, Commissioner 4224 Michigan Avenue Fort Myers, FL 33916	05/15/2006	06/06/2010

**3. Current Listing of HACFM Resident Advisory Board Members,
2006**

Ed Jankowski
Royal Palm Towers Apartments

Carl Harper
Palmetto Court

Barbara Hall
Flossie M. Riley Elderly Apartments

Pat Delaney
Bonair Towers

**4. ASSESSMENT OF DEMOGRAPHIC CHANGES IN PUBLIC
HOUSING PROPERTIES WITH SITE-BASED WAITING LISTS -
See Page 19**

5. Recommendation to the Follow Up Plan to HUD's RASS

Note: The HACFM is still under the prior RASS plan. The Housing Authority of the City of Fort Myers has developed the following recommendations in three areas as part of that 2005 Follow Up Plan on Resident Assessment:

Communication

- Pre-Lease Orientation: For all incoming residents to explain HACFM Policies, Lease and Rules and Regulations.
- Resident Review: Similar to the pre-lease orientation but for current residents with minor lease violations.
- Customer Service Survey for Housing Management: Survey residents who came in for re-certification, management assistance, and payments (rent, charges, fines, etc.)
- Re-establish support link with inactive Resident Organizations

Safety

- Update current ACOP and HACFM procedures that will address stiffer rules on Resident Screening.

- Property Managers to Attend Fort Myers Police Department's Citizen Police Academy.
- Work with Resident Associations to establish and maintain Neighborhood Watch programs

Neighborhood Appearance

- Establish a Preventive Maintenance program to address issues such as exterior appearance of the buildings, parking lots, etc.
- Establish a Towing Policy to address abandoned, inoperative vehicles or vehicles with No Decals.
- Establish Trash Pick Up Policy and Procedure for White Goods and Bulk pick up.

6. PHAS Component #4 – See Page 50

7. VIOLENCE AGAINST WOMEN ACT - Implementation

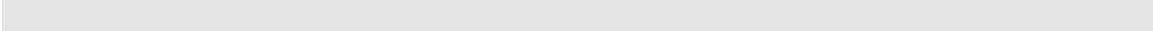
During 2007, the HACFM continued to implement PIH Notice 2006-42 concerning Violence Against Women and Justice Department Reauthorization Act 2005 & Form HUD – 50066 Certification of Domestic Violence, Dating Violence, or Stalking, in both Public Housing and Section 8 (both Project Based and Voucher) programs.

Attachments

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

Attachment files submitted electronically to HUD with this plan:

- (1) fl047a01 – Capital Fund Tables for PHA FY 2008 –2012
- (2) fl047b01 – P & E 09/30/07 for CFP FY 2007
- (3) fl047c01 – P & E 09/30/07 for CFP FY 2006
- (4) fl047d01 – P & E 09/30/07 for CFP FY 2005
- (5) fl047e01 – P & E 09//30/07 for CFP FY 20 04
- (6) fl047f01 – P & E 09//30/07 for CFP Disaster Relief 04



CAPITAL FUND PROGRAM TABLES START HERE

f1047a01

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14P04750108 Replacement Housing Factor Grant No:		Federal FY of Grant: 2008	
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	180,000			
3	1408 Management Improvements	67,500			
4	1410 Administration	80,000			
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	5,000			
8	1440 Site Acquisition				
9	1450 Site Improvement	75,000			
10	1460 Dwelling Structures	570,626			
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures	20,000			
13	1475 Nondwelling Equipment				
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				

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

PHA Name: The Housing Authority of the City of Fort Myers	Grant Type and Number Capital Fund Program Grant No: FL14P04750108 Replacement Housing Factor Grant No:	Federal FY of Grant: 2008
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Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending: Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
21	Amount of Annual Grant: (sum of lines 2 – 20)	988,126			
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: f114P04750108 Replacement Housing Factor Grant No:			Federal FY of Grant: 2008			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL47-01 Southward Village	Resident Common Areas	1470		5,000				
FL47-01 Southward Village	Landscaping	1450		25,000				
FL47-2 Bonair Towers	Resident Common Areas	1470		5,000				
FL47-2 Bonair Towers	Replace Windows	1460	11 Story Bldg	434,576				
FL47-2 Bonair Towers	Landscaping	1450		5,000				
FL47-3 Palmetto Court	Resident Common Areas	1470		5,000				
FL47-3 Palmetto Court	Landscaping	1450		5,000				
FL47-3 Palmetto Court	Security & Lighting	1450		12,500				
FL47-4 Royal Palm Towers	Resident Common Areas	1470		5,000				

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

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: f114P04750108 Replacement Housing Factor Grant No:				Federal FY of Grant: 2008		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
FL47-4 Royal Palm Towers	Replace Bathroom Lavatories	1460	50 units	16,050				
FL47-4 Royal Palm Towers	Exterior Paint	1460	11 Story Bldg	120,000				
FL47-4 Royal Palm Towers	Security & Lighting	1450		12,500				
FL47-4 Royal Palm Towers	Landscaping	1450		5,000				
FL47-4 Royal Palm Towers	Architect & Engineering	1430		5,000				
FL047 PHA Wide	Operations	1406		180,000				
FL047 PHA Wide	Computer Software and Support	1408		15,000				
FL047 PHA Wide	Resident Initiatives	1408		15,000				
FL047 PHA Wide	Operational Improvements	1408		15,000				
FL047 PHA Wide	Training	1408		10,000				
FL047 PHA Wide	Community/Internal Safety Program	1408		10,000				
FL047 PHA Wide	HTVN	1408		2,500				
FL047 PHA Wide	Administration	1410		80,000				

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

PHA Name: The Housing Authority of the City of Fort Myers	Grant Type and Number Capital Fund Program No: f114P04750108 Replacement Housing Factor No:	Federal FY of Grant: 2008
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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	
FL47-01 Southward Village	Sept 10			Sept 11			
FL47-02 Bonair Towers	Sept 10			Sept 11			
FL47-03 Palmetto Court	Sept 10			Sept 11			
FL47-02 Royal Palm Towers	Sept 10			Sept 11			
FL047 PHA Wide	Sept 10			Sept 11			
1406	Sept 10			Sept 11			
1408	Sept 10			Sept 11			
1410	Sept 10			Sept 11			
1430	Sept 10			Sept 11			
1450	Sept 10			Sept 11			
1460	Sept 10			Sept 11			
1465	Sept 10			Sept 11			
1470	Sept 10			Sept 11			
1475	Sept 10			Sept 11			

Capital Fund Program Five-Year Action Plan

Part I: Summary

PHA Name The Housing Authority of the City of Fort Myers		<input checked="" type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:			
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2009 PHA FY: 2009	Work Statement for Year 3 FFY Grant: 2010 PHA FY: 2010	Work Statement for Year 4 FFY Grant: 2011 PHA FY: 2011	Work Statement for Year 5 FFY Grant: 2012 PHA FY: 2012
	Annual Statement				
FL47-01 Southward Village		64,050	326,557	407,057	300,000
FL47-02 Bonair Towers		172,007	12,500	11,500	132,557
FL47-02 Palmetto Court		168,000	81,000	11,500	0
FL47-02 Royal Palm Towers		28,500	12,500	2,500	0
FL047 PHA Wide		322,500	322,500	322,500	322,500
CFP Funds Listed for 5-year planning		755,057	755,057	755,057	755,057
Replacement Housing Factor Funds		To be determined	To be determined	To be determined	To be determined

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

Activities for Year 1	Activities for Year : <u>2</u> FFY Grant: 2008 PHA FY: 2008			Activities for Year: <u>3</u> FFY Grant: 2009 PHA FY: 2009		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	FL47-01 Southward Village	Landscaping	10,000	FL47-01 Southward Village	Resident Common Areas	2,500
	FL47-01 Southward Village	Refinish Tubs	40,550	FL47-01 Southward Village	Replace Windows	161,557
	FL47-01 Southward Village	Resident Community Areas	3,500	FL47-01 Southward Village	Concrete Clothesline Pads	100,000
	FL47-01 Southward Village	Security and Lighting	10,000	FL47-01 Southward Village	Refinish Tubs	40,000
	Subtotal		64,050	FL47-01 Southward Village	Security & Lighting	12,500
				FL47-01 Southward Village	Landscaping	10,000
				Subtotal		326,557
Annual	FL47-02 Bonair Towers	Exterior Painting	138,507	FL47-02 Bonair Towers	Landscaping	10,000
	FL47-02 Bonair Towers	Security & Lighting	5,000	FL47-02 Bonair Towers	Resident Community Areas	2,500
	FL47-02 Bonair Towers	Landscaping	5,000	Subtotal		12,500
	FL47-02 Bonair Towers	Resident Community Areas	3,500			
	FL47-02 Bonair Towers	ADA/504 Compliance	15,000			
	FL47-02 Bonair Towers	Architect & Engineering	5,000			
	Subtotal		172,007			
Statement	FL47-02 Palmetto Court	Closet Doors	90,000	FL47-02 Palmetto Court	Closet Doors	40,000
	FL47-02 Palmetto Court	Resident Community Areas	3,500	FL47-02 Palmetto Court	Resident Community Areas	2,500
	FL47-02 Palmetto Court	Dryer Outlets & Vents	14,500	FL47-02 Palmetto Court	Security & Lighting	12,500
	FL47-02 Palmetto Court	Concrete Clothesline Pads	40,000	FL47-02 Palmetto Court	Landscaping	10,000
	FL47-02 Palmetto Court	Landscaping	10,000	FL47-02 Palmetto Court	Architect & Engineering	15,000
	FL47-02 Palmetto Court	Security & Lighting	10,000	FL47-02 Palmetto Court	Project Costs	1,000
	Subtotal		168,000	Subtotal		81,000

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

Activities for Year :_4___ FFY Grant: 2011 PHA FY: 2011			Activities for Year: _5___ FFY Grant: 2012 PHA FY: 2012		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
FL47-01 Southward Village	Replace Windows	395,557	FL47-01 Southward Village	Parking Lot Repair/Repave	300,000
FL47-01 Southward Village	Landscaping	10,000	Subtotal		300,000
FL47-01 Southward Village	Resident Community Areas	1,500			
Subtotal		407,057			
FL47-02 Bonair Towers	Landscaping	10,000	FL47-02 Bonair Towers	Elevator Modernization	132,557
FL47-02 Bonair Towers	Resident Community Areas	1,500	Subtotal		132,557
Subtotal		11,500			
FL47-02 Palmetto Court	Landscaping	10,000			
FL47-02 Palmetto Court	Resident Community Areas	1,500			
Subtotal		11,500			
FL47-02 Royal Palm Towers	Landscaping	1,000			
FL47-02 Royal Palm Towers	Resident Community Areas	1,500			
Subtotal		2,500			
FL047 PHA Wide	Operations	175,000	FL047 PHA Wide	Operations	175,000
FL047 PHA Wide	Computer Software and Support	15,000	FL047 PHA Wide	Computer Software and Support	15,000
FL047 PHA Wide	Resident Initiatives	15,000	FL047 PHA Wide	Resident Initiatives	15,000
FL047 PHA Wide	Operational Improvements	15,000	FL047 PHA Wide	Operational Improvements	15,000
FL047 PHA Wide	Training	10,000	FL047 PHA Wide	Training	10,000
FL047 PHA Wide	Community/Internal Safety Prog	10,000	FL047 PHA Wide	Community/Internal Safety Prog	10,000

FL047 PHA Wide	HTVN	2,500	FL047 PHA Wide	HTVN	2,500
FL047 PHA Wide	Administration	80,000	FL047 PHA Wide	Administration	80,000
Total CFP Estimated Cost		\$755,057			755,057

Annual Statement / Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP / CFPRHF) Part 1: Summary

PHA Name: Housing Authority of The City of Fort Myers	Grant Type and Number Capital Fund Program Grant No: FL14P04750107 Replacement Housing Factor Grant No:	FEDERAL FY of Grant: 2007
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<input type="checkbox"/> Original Annual Statement	<input type="checkbox"/> Reserve for Disasters / Emergencies	<input type="checkbox"/> Revised Annual Statement (revision no: 1)
<input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 9/30/2007	<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	\$ 333,000.00		\$ -	\$ -
3	1408 Management Improvements Soft Costs	\$ 139,500.00		\$ -	\$ -
	Management Improvements Hard Costs				
4	1410 Administration	\$ 80,000.00		\$ -	\$ -
5	1411 Audit				
6	1415 Liquidated Damages			\$ -	\$ -
7	1430 Fees and Costs	\$ 32,000.00			
8	1440 Site Acquisition				
9	1450 Site Improvements	\$ 628,000.00		\$ -	\$ -
10	1460 Dwelling Structures	\$ 452,519.00		\$ -	\$ -
11	1465.1 Dwelling Equipment - Nonexpendable				
12	1470 Non-dwelling Structures				
13	1475 Non-dwelling Equipment				
14	1485 Demolition				
15	1490 Replacment Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1502 Contingencies				
XX	Amount of Annual Grant: (sum of lines...)	\$ 1,665,019.00	\$ -	\$ -	\$ -
	Amount of line XX Related to LBP Activities				
	Amount of line XX Related to Section 504 Compliance				
	Amount of line XX 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: Housing Authority of The City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14P04750107 Replacement Housing Factor Grant No:				FEDERAL FY of Grant: 2007		
Development Name Number/HA-Wide Activities	General Description of Major Work Activities	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Obligated	Expended	
HA Wide	Operations	1406	All	\$ 333,000.00				
	Sub Total			\$ 333,000.00				
HA Wide	Management Improvements	1408						
HA Wide	1. Computer Software and Support	1408		\$ 35,000.00				
HA Wide	2. Resident Initiatives	1408		\$ 27,000.00				
HA Wide	3. General Operational Improvements	1408		\$ 30,000.00				
HA Wide	4. Staff Training	1408		\$ 20,000.00				
HA Wide	5. Community /Internal Safety Program	1408		\$ 25,000.00				
HA Wide	6. HTVN	1408		\$ 2,500.00				
	Sub Total			\$ 139,500.00				
HA Wide	Administration	1410		\$ 80,000.00				
	Sub Total			\$ 80,000.00				
FL047-1 Southward Village	Landscaping	1450		\$ 5,000.00				
	Sub Total			\$ 5,000.00				

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

Part II: Supporting Pages

PHA Name: Housing Authority of The City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14P04750107 Replacement Housing Factor Grant No:				FEDERAL FY of Grant: 2007		
Development Number Name/HA- Wide Activities	General Description of Major Work Activities	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Obligated	Expended	
FL047-2	Replace Windows	1460		\$	408,519.00			
Bonair Towers	Security & Lighting	1450		\$	12,500.00			
	Landscaping	1450		\$	10,000.00			
	Architect & Engineering	1430		\$	15,000.00			
	Project Costs - Plans	1430		\$	1,000.00			
	Sub Total			\$	447,019.00			
FL47-3	Replace Bathroom Cabinet/Lavatories	1460		\$	44,000.00			
Palmetto Court	Site Drainage	1450		\$	565,000.00			
	Resurface Basket ball Court	1450		\$	3,000.00			
	Landscaping	1450		\$	10,000.00			
	Architect and Engineering	1430		\$	15,000.00			
	Project Cots - Plans	1430		\$	1,000.00			
	Sub Total			\$	638,000.00			
FL47-4	Security & Lighting	1450		\$	12,500.00			
Royal Palm Towers	Landscaping	1450		\$	10,000.00			
	Sub Total			\$	22,500.00			
	Total			\$	1,665,019.00			

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 I: Summary					
PHA Name: THE HOUSING AUTHORITY OF THE CITY OF FORT MYERS		Grant Type and Number Capital Fund Program Grant No: FL14PO4750106 Replacement Housing Factor Grant No:			Federal FY of Grant: 2006
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 9-30-07 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revision 1 (In House)	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	333,580.00	333,580.00	333,580.00	333,580.00
3	1408 Management Improvements	166,791.00	166,791.00	48,650.11	48,650.11
4	1410 Administration	83,000.00	83,000.00	54,598.46	54,598.46
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	32,000.00	32,000.00	453.06	453.06
8	1440 Site Acquisition				
9	1450 Site Improvement	160,000.00	160,000.00	0.00	0.00
10	1460 Dwelling Structures	779,242.00	779,242.00	0.00	0.00
11	1465.1 Dwelling Equipment—Nonexpendable	44,500.00	44,500.00	23,000.00	23,000.00
12	1470 Nondwelling Structures	35,000.00	35,000.00	0.00	0.00
13	1475 Nondwelling Equipment	33,800.00	33,800.0	0.00	0.00
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				

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

PHA Name: THE HOUSING AUTHORITY OF THE CITY OF FORT MYERS	Grant Type and Number Capital Fund Program Grant No: FL14PO4750106 Replacement Housing Factor Grant No:	Federal FY of Grant: 2006
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Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending: 9-30-07 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revision 1 (In House)	Obligated	Expended
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	1,667,913.00	1,667,913.00	460,281.63	460,281.63
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: THE HOUSING AUTHORITY OF THE CITY OF FORT MYERS		Grant Type and Number Capital Fund Program Grant No: FL14P04750106 Replacement Housing Factor Grant No:				Federal FY of Grant: 2006		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revision 1	Funds Obligated	Funds Expended	
FL047-01 Southward Village	Exterior Paint – (Estimated amount needed to complete 2005 CFP BLI)	1460	103 Bldg & Admin/Com Ctr Bldg	155,210	155,210	0.00	0.00	
FL047-01 Southward Village	Flooring	1460	17 Units	34,000	34,000	0.00	0.00	
FL047-01 Southward Village	Sewer Rejuvenation / Line Replacement	1460		328,992	328,992	0.00	0.00	Most of this was done with 2005 CFP. Once job complete budget revision will be submitted to move excess to other BLL.
FL047-01 Southward Village	Architect & Engineering Fees	1430		30,000	30,000	0.00	0.00	
FL047-01 Southward Village	Project Costs	1430		2,000	1,500	20.29	20.29	
FL047-01 Southward Village	Appliances	1465	92 units	21,225	21,225	21,225.00	21,225.00	Completed
FL47-02 Bonair Towers	Appliances (completion of PY Project)	1465	2 units	600	575	575.00	575.00	Completed

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

PHA Name: THE HOUSING AUTHORITY OF THE CITY OF FORT MYERS		Grant Type and Number Capital Fund Program Grant No: FL14P04750106 Replacement Housing Factor Grant No:				Federal FY of Grant: 2006		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revision 1	Funds Obligated	Funds Expended	
FL47-02 Bonair Towers	Security & Site Lighting	1450		12,500	12,500	0.00	0.00	
FL47-03 Palmetto Court	Appliances (completion of PY Project)	1465	2 units	575	600	600.00	600.00	Completed
FL47-03 Palmetto Court	Project Costs	1430		0	500	432.77	432.77	
FL47-04 Royal Palm Towers	Elevator Modernization	1460	2 – Control Panels	261,040	261,040	0.00	0.00	
FL47-04 Royal Palm Towers	Appliances (completion of PY Project)	1465	2 units	600	600	600.00	600.00	Completed
FL47-04 Royal Palm Towers	Security & Site Lighting	1450		12,500	12,500	0.00	0.00	
FL047 PHA Wide	Operations	1406		333,580	333,580	333,580.00	333,580.00	
FL047 PHA Wide	Computer Software & Support	1408		44,291	44,291	976.00	976.00	
FL047 PHA Wide	Resident Initiatives	1408		20,000	20,000	9,025.00	9,025.00	
FL047 PHA Wide	Operational Improvements – Accounting Software, Installation & Training	1408		40,000	40,000	24,030.67	24,030.67	

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

PHA Name: THE HOUSING AUTHORITY OF THE CITY OF FORT MYERS		Grant Type and Number Capital Fund Program Grant No: FL14P04750106 Replacement Housing Factor Grant No:				Federal FY of Grant: 2006		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revision 1	Funds Obligated	Funds Expended	
FL047 PHA Wide	Training –Seminar and Travel Costs for Asset Mgt Cert Training, Casterline Project Based Budgeting , FAHROo, SERC/NAHRO Conf, NNC Seminar	1408		40,000	40,000	14,574.44	14,574.44	
FL047 PHA Wide	Community/Internal Safety Program	1408		15,000	15,000	44.00	44.00	
FL047 PHA Wide	HTVN	1408		7,500	7,500	0.00	0.00	
FL047 PHA Wide	Modernization Coordinator	1410		30,000	30,000	17,162.22	17,162.22	
FL047 PHA Wide	Modernization Office Clerk	1410		19,000	19,000	15,524.68	15,524.68	
FL047 PHA Wide	Administration	1410		10,500	10,500	9,506.23	9,506.23	
FL047 PHA Wide	Employee Benefits	1410		21,000	21,000	12,275.99	12,275.99	
FL047 PHA Wide	Modernization Office Supplies	1410		2,500	2,500	129.34	129.34	
FL047 PHA Wide	Landscaping	1450		35,000	35,000	0.00	0.00	*
FL047 PHA Wide	Recreational Facilities	1450		50,000	50,000	0.00	0.00	*
FL047 PHA Wide	Site Improvement	1450		50,000	50,000	0.00	0.00	*
FL047 PHA Wide	Appliances	1465		21,500	21,500	0.00	0.00	*
FL047 PHA Wide	Admin Bldg Renovation	1470		20,000	20,000	0.00	0.00	*
FL047 PHA Wide	Resident Community Areas	1470		15,000	15,000	0.00	0.00	*
FL047 PHA Wide	Computer Equipment	1475		10,000	10,000	0.00	0.00	*
FL047 PHA Wide	Modernization Crew Vehicles/Equip	1475		23,800	23,800	0.00	0.00	*
							0.00	*

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: THE HOUSING AUTHORITY OF THE CITY OF FORT MYERS		Grant Type and Number Capital Fund Program Grant No: FL14P04750106 Replacement Housing Factor Grant No:			Federal FY of Grant: 2006			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revision 1	Funds Obligated	Funds Expended	
* We plan to	revise this 2006 budget, in accordance with the new Annual Plan, and move these items to 1460 BLI.							*

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule							
PHA Name:		Grant Type and Number Capital Fund Program No: Replacement Housing Factor No:			Federal FY of Grant:		
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	
FL47-01 Southward Village	Sept 08			Sept 09			
FL47-02 Royal Palm Towers	Sept 08			Sept 09			
FL47 PHA Wide 1406	Sept 08			Sept 09			

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

PHA Name:		Grant Type and Number Capital Fund Program No: Replacement Housing Factor No:					Federal FY of Grant:	
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		
1408	Sept 08			Sept 09				
1410	Sept 08			Sept 09				
1430	Sept 08			Sept 09				
1450	Sept 08			Sept 09				
1460	Sept 08			Sept 09				
1465	Sept 08			Sept 09				
1470	Sept 08			Sept 09				
1475	Sept 08			Sept 09				

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 I: Summary					
PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47501-05 Replacement Housing Factor Grant No:		Federal FY of Grant: 2005	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement () <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 9/30/2007 <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revision	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	336,360.00		336,360.00	336,360.00
3	1408 Management Improvements	115,800.00		115,800.00	115,800.00
4	1410 Administration	50,223.00		50,223.00	50,223.00
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	6,388.92		6,388.92	6,388.92
8	1440 Site Acquisition				
9	1450 Site Improvement	78,875.81		78,875.81	46,925.81
10	1460 Dwelling Structures	1,049,021.24		1,049,021.24	268,838.50
11	1465.1 Dwelling Equipment—Nonexpendable	44,500.00		44,500.00	44,500.00
12	1470 Nondwelling Structures	54,180.52		54,180.52	54,180.52
13	1475 Nondwelling Equipment	912.51		912.51	912.51
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				

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

PHA Name: The Housing Authority of the City of Fort Myers	Grant Type and Number Capital Fund Program Grant No: FL14PO47501-05 Replacement Housing Factor Grant No:	Federal FY of Grant: 2005
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement ()
 Performance and Evaluation Report for Period Ending: 9/30/2007
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revision	Obligated	Expended
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	1,736,262.00		1,736,262.00	924,129.26
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance	0.00			
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47501-05 Replacement Housing Factor Grant No:				Federal FY of Grant: 2005		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revision	Funds Obligated	Funds Expended	
FL 047-001 Southward Village	Sewer Rejuvenation	1460	Entire Develop.	74,655.00		74,655.00	74,655.00	Completed)
FL 047-001 Southward Village	Flooring	1460	30 units	55,806.24		55,806.24	16,556.50	Contracted-
FL 047-001 Southward Village	Exterior Painting	1460	103 bldg	82,198.00		82,198.00	0.00	Contracted
FL 047-001 Southward Village	Recreational-Playground Equi	1450		45,151.29		45,151.29	45,151.29	Completed
FL 047-001 Southward Village	Project Costs – Plans	1430		1,502.88		1,502.88	1,502.88	Completed
FL 047-001 Southward Village	Appliances – Ranges	1465	108	24,975.00		24,975.00	24,975.00	Completed
FL 047-001 Southward Village	Installation of Ranges	1460	200	8,000.00		8,000.00	8,000.00	Completed
FL 047-001 Southward Village	Admin Bldg Renovation	1470		19,180.52		19,180.52	19,180.52	Completed
FL 047-001 Southward Village	Resident Community Areas	1470		35,000.00		35,000.00	35,000.00	Completed
FL 047-002 Bonair Towers	Reconnect A/C Drains	1460	10 Story Development	35,000.00		35,000.00	0.00	Contracted
FL 047-002 Bonair Towers	Sewer Rejuvenation	1460	Entire Bldg	80,617.00		80,617.00	80,617.00	Completed
FL 047-002 Bonair Towers	Installation of Ranges	1460	100	3,800.00		3,800.00	3,800.00	Completed
FL 047-002 Bonair Towers	Security and Lighting	1450		21,724.52		21,724.52	1,774.52	Contracted
FL 047-002 Bonair Towers	Project Costs – Plans	1430		725.00		725.00	725.00	Completed
FL 047-003 Palmetto Court	Windows	1460	100 Units	272,358.00		272,358.00	0.00	Contracted
FL 047-003 Palmetto Court	Roofs	1460	20 Bldg	235,760.00		235,760.00	0.00	Contracted
FL 047-003 Palmetto Court	Appliances – Ranges	1465	85 units	19,525.00		19,525.00	19,525.00	Completed

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

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47501-05 Replacement Housing Factor Grant No:				Federal FY of Grant: 2005		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revision	Funds Obligated	Funds Expended	
FL 047-003 Palmetto Court	Range Installation	1460	100 units	4,000.00		4,000.00	4,000.00	Completed
FL 047-003 Palmetto Court	Project Costs – Plans	1430		3,436.04		3,436.04	3,436.04	Completed
FL 047-004 Royal Palm Towers	A/C Drain Repair	1460	11 Story Deveopment	35,000.00		35,000.00	0.00	Contracted
FL 047-004 Royal Palm Towers	Range Installation – Plans	1460	100 units	3,800.00		3,800.00	3,800.00	Completed
FL 047-004 Royal Palm Towers	Sewer Rejuvenation	1460	Entire Bldg	80,617.00		80,617.00	0.00	Contracted
FL 047-004 Royal Palm Towers	Security and Lighting	1450		12,000.00		12,000.00	0.00	Contracted
FL 047-004 Royal Palm Towers	Project Costs	1430		725.00		725.00	725.00	Completed
FL 047-004 Michigan Court / Flossie Riley	Roof Repairs	1460		77,410.00		77,410.00	77,410.00	Completed
PHA Wide	Operations	1406		336,360.00		336,360.00	336,360.00	Completed
PHA Wide	Computer Software/Support	1408		23,293.12		23,293.12	23,293.12	Completed
PHA Wide	Resident Initiatives	1408		23,207.78		23,207.78	23,207.78	Completed
PHA Wide	Operational Improvements	1408		40,497.58		40,497.58	40,497.58	Completed
PHA Wide	Training – Staff Operations – Mgt/Occupancy, UPCS, Elderly Svc, Finance Update	1408		23,701.39		23,701.39	23,701.39	Completed
PHA Wide	Comm/Internal Safety Prog	1408		100.13		100.13	100.13	Completed
PHA Wide	HTVN	1408		5,000.00		5,000.00	5,000.00	Completed

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

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47501-05 Replacement Housing Factor Grant No:			Federal FY of Grant: 2005			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revision	Funds Obligated	Funds Expended	
PHA Wide	Modernization Coordinator	1410		20,306.66		20,306.66	20,306.66	Completed
PHA Wide	Modernization Office Clerk	1410		10,875.56		10,875.56	10,875.56	Completed
PHA Wide	Administration	1410		5,978.31		5,978.31	5,978.31	Completed
PHA Wide	Employee Benefits	1410		13,062.47		13,062.47	13,062.47	Completed
PHA Wide	Computer Equipment	1475		912.51		912.51	912.51	Completed
								*
								*

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

PHA Name: The Housing Authority of the City of Fort Myers	Grant Type and Number Capital Fund Program No: FL14PO47501-05 Replacement Housing Factor No:	Federal FY of Grant: 2005
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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	
FL 047-001 Southward Village	Sept 07	August 15, 2007		Sept 08			
FL 047-003 Palmetto Court	Sept 07	August 15, 2007		Sept 08			
FL 047-004 Royal Palm Towers	Sept 07	August 15, 2007		Sept 08			
FL 047-006 Michigan Court	Sept 07			Sept 08			
PHA Wide	1406 Sept 07			Sept 07			
	1408 Sept 07			Sept 07			
	1410 Sept 07			Sept 07			
	1430 Sept 07			Sept 07			
	1450 Sept 07			Sept 07			
	1460 Sept 07			Sept 07			
	1465 Sept 07			Sept 07			
	1470 Sept 07			Sept 07			
	1475 Sept 07			Sept 07			

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 I: Summary					
PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47501-04 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 9/30/2007 <input checked="" type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revision 1	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	329,980.00		329,980.00	329,980.00
3	1408 Management Improvements	329,980.00		329,980.00	329,980.00
4	1410 Administration	76,555.00		76,555.00	76,555.00
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	32,000.00		32,000.00	32,000.00
8	1440 Site Acquisition				
9	1450 Site Improvement	190,000.00		190,000.00	190,000.00
10	1460 Dwelling Structures	572,587.00		572,587.00	572,587.00
11	1465.1 Dwelling Equipment—Nonexpendable	50,000.00		50,000.00	50,000.00
12	1470 Nondwelling Structures	35,000.00		35,000.00	35,000.00
13	1475 Nondwelling Equipment	33,800.00		33,800.00	33,800.00
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				

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

PHA Name: The Housing Authority of the City of Fort Myers	Grant Type and Number Capital Fund Program Grant No: FL14PO47501-04 Replacement Housing Factor Grant No:	Federal FY of Grant: 2004
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Original Annual Statement
 Reserve for Disasters/ Emergencies
 Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending: 9/30/2007
 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revision 1	Obligated	Expended
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	1,649,902.00		1,649,902.00	1,649,902.00
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47501-04 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		Total Actual Cost		Status of Work
				Original	Revision	Funds Obligated	Funds Expended	
FL 047-001 Southward Village	Flooring	1460	17 units	34,789.75		34,789.75	34,789.75	Complete
FL 047-001 Southward Village	Roofs - CRC	1460		250,000.00		250,000.00	250,000.00	Complete
FL 047-001 Southward Village	Electric/Code Upgrades - CRC	1460		281,462.53		281,462.53	281,462.53	Complete
FL 047-001 Southward Village	Architectural & Engineering	1430		26,974.48		26,974.48	26,974.48	Complete
FL 047-001 Southward Village	Project Costs – Plan Duplicate	1430		202.86		202.86	202.86	Complete
FL 047-001 Southward Village	Recreational Facilities – Playground Equipment	1450		39,309.98		39,309.98	39,309.98	Complete
FL 047-001 Southward Village	Resident Community Areas	1470		31,937.74		31,937.74	31,937.74	Complete
								Complete
Fl 047-002 Bonair Towers	Generator	1460		3,596.00		3,596.00	3,596.00	Complete
Fl 047-002 Bonair Towers	Landscaping	1450		8,544.24		8,544.24	8,544.24	Complete
Fl 047-002 Bonair Towers	Site Improvement	1450		77.35		77.35	77.35	Complete
Fl 047-002 Bonair Towers	Security & Lighting – Parking Lot Lighting, Security Card Door System, Safety Paint Stairwells	1450		24,736.50		24,736.50	24,736.50	Complete
Fl 047-002 Bonair Towers	Appliances – Stoves	1465	98	23,500.00		23,500.00	23,500.00	Complete
								Complete
FL 047-003 Palmetto Court	Architect & Engineering	1430		4,060.19		4,060.19	4,060.19	Complete
FL 047-003 Palmetto Court	Landscaping	1450		3,196.96		3,196.96	3,196.96	Complete

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

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47501-04 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		Total Actual Cost		Status of Work
				Original	Revision	Funds Obligated	Funds Expended	
FL 047-003 Palmetto Court	Recreational Facilities – Playground Equipment	1450		86,266.44		86,266.44	86,266.44	Complete
FL 047-003 Palmetto Court	Site Improvement	1450		3,240.00		3,240.00	3,240.00	Complete
FL 047-003 Palmetto Court	Security & Lighting	1450		450.00		450.00	450.00	Complete
FL 047-003 Palmetto Court	Interior/Exterior Painting	1460		2,738.72		2,738.72	2,738.72	Complete
FL 047-003 Palmetto Court	Appliances – Stoves	1465	13	3,000.00		3,000.00	3,000.00	Complete
								Complete
FL 047-004 Royal Palm Towers	Landscaping	1450		2,526.36		2,526.36	2,526.36	Complete
FL 047-004 Royal Palm Towers	Site Improvement	1450		5,881.22		5,881.22	5,881.22	Complete
FL 047-004 Royal Palm Towers	Security & Lighting – Safety Paint Stairwells	1450		10,740.00		10,740.00	10,740.00	Complete
FL 047-004 Royal Palm Towers	Appliances - Stoves	1465	98	23,500.00		23,500.00	23,500.00	Complete
FL 047-004 Royal Palm Towers	Resident Community Area	1470		875.00		875.00	875.00	Complete
								Complete
FL 047-006 Michigan Family & Flossie Riley	Landscaping	1450		390.95		390.95	390.95	Complete
FL 047-006 Michigan Family & Flossie Riley	Site Improvement	1450		4,640.00		4,640.00	4,640.00	Complete
FL 047-006 Michigan Family & Flossie Riley	Architect & Engineering	1430		745.67		745.67	745.67	Complete
								Complete
PHA Wide	Operations	1406		329,980.00		329,980.00	329,980.00	Complete

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

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14PO47501-04 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		Total Actual Cost		Status of Work
				Original	Revision	Funds Obligated	Funds Expended	
PHA Wide	Computer Software/Support	1408		3,928.77		3,928.77	3,928.77	Complete
PHA Wide	Time & Attendance System	1408		9,459.00		9,459.00	9,459.00	Complete
PHA Wide	Hope VI Application	1408		228,407.25		228,407.25	228,407.25	Complete
PHA Wide	Resident Initiatives	1408		34,439.16		34,439.16	34,439.16	Complete
PHA Wide	Operational Improvements	1408		36,259.91		36,259.91	36,259.91	Complete
PHA Wide	Training – Staff Operational – NNC, PIH, UPCS, Fraud Control	1408		14,335.91		14,335.91	14,335.91	Complete
PHA Wide	HTVN	1408		3,150.00		3,150.00	3,150.00	Complete
PHA Wide	Modernization Coordinator	1410		30,892.15		30,892.15	30,892.15	Complete
PHA Wide	Modernization Office Clerk	1410		22,639.68		22,639.68	22,639.68	Complete
PHA Wide	Administration	1410		0.00		0.00	0.00	Complete
PHA Wide	Employee Benefits	1410		21,236.79		21,236.79	21,236.79	Complete
PHA Wide	Mod Office Supplies	1410		1,786.38		1,786.38	1,786.38	Complete
PHA Wide	Project Costs	1430		16.80		16.80	16.80	Complete
PHA Wide	Admin Bldg Renovations	1470		2,187.26		2,187.26	2,187.26	Complete
PHA Wide	Mod Crew Vehicles/Equip	1475	1	24,726.16		24,726.16	24,726.16	Complete
PHA Wide	Computers	1475		9,073.84		9,073.84	9,073.84	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: The Housing Authority of the City of Fort Myers			Grant Type and Number Capital Fund Program No: FL14PO47501-04 Replacement Housing Factor No:			Federal FY of Grant: 2004	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
FL 047-001 Southward Village	Sept 06		Sept 06	Sept 07		Mar 07	
PHA Wide	1406	Sept 06	Sept 06	Sept 07		Sept 04	
	1408	Sept 06	Sept 06	Sept 07		Sept 06	
	1410	Sept 06	Sept 06	Sept 07		Mar 05	
	1430	Sept 06	Sept 06	Sept 07		June 07	
	1450	Sept 06	Sept 06	Sept 07		June 07	
	1460	Sept 06	Sept 06	Sept 07		Sept 05	
	1465	Sept 06	Sept 06	Sept 07		Nov 06	
	1470	Sept 06	Sept 06	Sept 07		Oct 06	
	1475	Sept 06	Sept 06	Sept 07		Oct 06	

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 I: Summary					
PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14D047501-04 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no:) X Performance and Evaluation Report for Period Ending 9-30-2007 X 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	1,644,618.39		1,644,618.39	1,644,618.39
2	1406 Operations				
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	8,034.98		8,034.98	8,034.98
8	1440 Site Acquisition				
9	1450 Site Improvement	87,990.50		87,990.50	87,990.50
10	1460 Dwelling Structures	567,321.52		567,321.52	567,321.52
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures	0.00		0.00	0.00
13	1475 Nondwelling Equipment				
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				

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

PHA Name: The Housing Authority of the City of Fort Myers	Grant Type and Number Capital Fund Program Grant No: FL14D047501-04 Replacement Housing Factor Grant No:	Federal FY of Grant: 2004
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Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no:)
 Performance and Evaluation Report for Period Ending 9-30-2007 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
20	1502 Contingency	0.00			
21	Amount of Annual Grant: (sum of lines 2 – 20)	663,347.00		663,347.00	663,347.00
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14D047501-04 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		Total Actual Cost		Status of Work
				Original		Funds Obligated	Funds expended	
FL47-01	Roof Repairs	1460	103 Bldgs	12,508.04		12,508.04	12,508.04	Complete
	Fascia/soffit repair/replace	1460	16 Bldgs	7732.78		7732.78	7732.78	Complete
	Grounds clean up, tree removal	1450		16,657.45		16,657.45	16,657.45	Complete
	A & E	1430		2,828.98		2,828.98	2,828.98	Complete
FL47-02	Grounds clean up, tree removal	1450		7,152.91		7,152.91	7,152.91	Complete
	A & E	1430		183.00		183.00	183.00	Complete
FL47-03	Grounds clean up tree removal	1450		8,426.70		8,426.70	8,426.70	Complete
	A & E	1430		183.00		183.00	183.00	Complete
FL47-04	Grounds clean up, tree removal	1450		6,467.00		6,467.00	6,467.00	Complete
	A & E	1430		457.00		457.00	457.00	Complete
FL47-06	Roof repairs	1460	**	102 Bldgs	239,332.00	239,332.00	239,332.00	Complete
	Fasica/soffit repair/replace	1460	**	47 Bldgs	267,520.90	267,520.90	267,520.90	Complete
	HVAC replace exterior cabinets	1460	**	23 Bldgs	40,227.80	40,227.80	40,227.80	Complete
	Grounds clean up tree removal	1450			49,286.44	49,286.44	49,286.44	Complete
	A & E	1430			4,383.00	4,383.00	4,383.00	Complete

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

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program Grant No: FL14D047501-04 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		Total Actual Cost	Status of Work
				Original		Funds Obligated	Funds expended

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part III: Implementation Schedule

PHA Name: The Housing Authority of the City of Fort Myers		Grant Type and Number Capital Fund Program No: FL14D047501-04 Replacement Housing Factor No:			Federal FY of Grant: 2004		
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
FL47-01 Southward Village	3/29/2007	2/28/07		3/29/2008		3/28/07	
FL47-02 Bonair Towers	3/29/2007	2/28/07		3/29/2008		3/28/07	
FL47-03 Palmetto Court	3/29/2007	2/28/07		3/29/2008		3/28/07	
FL47-04 Royal Palm Towers	3/29/2007	2/28/07		3/29/2008		3/28/07	
FL47-06 Michigan/Flossie Riley	3/29/2007	2/28/07		3/29/2008		3/28/07	