

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

BASILE HOUSING AUTHORITY

PHA Plans

5 Year Plan for Fiscal Years 2005 – 2009

Annual Plan for Fiscal Year 2008

LA58v 02

Prepared December 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: Basile Housing Authority

PHA Number: LA58

PHA Fiscal Year Beginning: (mm/yyyy) January 1, 2008

PHA Programs Administered:

Public Housing and Section 8 Section 8 Only Public Housing Only

Number of public housing units: Number of S8 units: Number of public housing units: **22**
Number of S8 units:

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 20 - 20
[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)

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) Work with other housing providers in the PHA area to expend the supply of available decent, safe, and affordable housing
- 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)
 - 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) Assist tenants interested in becoming homeowners by helping them make contacts with agencies that can assist them.

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)
 - (1) Maintain sites and buildings so that they are an asset to the neighborhood.
 - (2) Continue to work with local police department in providing safe, secure housing for all tenants.

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)
 - (1) PHA will keep list of employable but unemployed tenants to refer to employers looking for workers, including contractors contracted to do capital projects.
 - (2) PHA will provide room to provide training sessions, workshops, etc., for tenants to improve economic opportunities.
 - (3) PHA will counsel tenants on improving skills and will list available schools or trades.
 - (4) PHA will also provide assistance, when requested, to help tenants gain admission to schools where they can learn skills for employment.
 - (5) PHA will keep in contact with local schools to learn their admission requirements, curriculums offered, semester start dates, etc., should tenants need the information. This information will be kept in PHA lobby so that all tenants will have easy access to the information.

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)

To abide by terms of Memorandum of Understanding with HUD

Annual PHA Plan
PHA Fiscal Year 20
[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.

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:

- I Admissions Policy for Deconcentration (ACOP)
- A FY 2003, 2004, 2005 ,2006 Capital Fund Program Annual Statement
- D Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY) Submitted under separate cover via e-mail because PHA does not technology to attach to this document
- E List of Resident Advisory Board Members
- F List of Resident Board Member
- G Community Service Description of Implementation
- H Information on Pet Policy
- Section 8 Homeownership Capacity Statement, if applicable
- Description of Homeownership Programs, if applicable

Optional Attachments:

- PHA Management Organizational Chart
- B FY 2008 Capital Fund Program 5 Year Action Plan
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- C Other (List below, providing each attachment name)
 - First Monthly Progress Report under MOA with HUD which outlines the requirements and the progress made
 - ACOP
 - Community Service and Self-Sufficiency Policy
 - Operating Budget
 - VAWA Statement

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
	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans
X	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair 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
	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 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	Annual Plan: Rent Determination

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	A & O Policy	
	Section 8 rent determination (payment standard) policies <input 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
	Section 8 informal review and hearing procedures <input 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
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program <input 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
	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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
X	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

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

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

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	15	N/A	N/A	N/A	N/A	N/A	N/A
Income >30% but <=50% of AMI	10	N/A	N/A	N/A	N/A	N/A	N/A
Income >50% but <80% of AMI	5	N/A	N/A	N/A	N/A	N/A	N/A
Elderly	5	N/A	N/A	N/A	N/A	N/A	N/A
Families with Disabilities	3	N/A	N/A	N/A	N/A	N/A	N/A
Race/Ethnicity Caucasian	7	N/A	N/A	N/A	N/A	N/A	N/A
Race/Ethnicity Black American	8	N/A	N/A	N/A	N/A	N/A	N/A
Race/Ethnicity							
Race/Ethnicity							

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

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

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	13		
Extremely low income <=30% AMI	0	0%	
Very low income (>30% but <=50% AMI)	9	69%	
Low income (>50% but <80% AMI)	4	31%	
Families with children	8	62%	
Elderly families	0	0%	
Families with Disabilities	3	23%	
Race/ethnicity Black American	4	31%	
Race/ethnicity Caucasian	9	69%	
Race/ethnicity			
Race/ethnicity			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	4	31%	2
2 BR	5	38%	2

Housing Needs of Families on the Waiting List			
3 BR	4	31%	3
4 BR	N/A	0%	
5 BR	N/A	0%	
5+ BR	N/A	0%	
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			

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) Apply for additional units if funds become available for new construction

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) Retain one-bedroom units normally occupied by the elderly in the PHA's dwelling unit inventory

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)
- (1) PHA to post notice that it affirmatively furthers fair housing
- (2) Work with local agencies in developing fair housing policies for the area

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

(2) Reasons for Selecting Strategies

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

- Funding constraints
- Staffing constraints
- Limited availability of sites for assisted housing
- Extent to which particular housing needs are met by other organizations in the community
- Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
- Influence of the housing market on PHA programs
- Community priorities regarding housing assistance
- Results of consultation with local or state government
- Results of consultation with residents and the Resident Advisory Board
- Results of consultation with advocacy groups
- Other: (list below)

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	\$ 64,546	
b) Public Housing Capital Fund	40,000.00	
c) HOPE VI Revitalization	0.00	
d) HOPE VI Demolition	0.00	
e) Annual Contributions for Section 8 Tenant-Based Assistance	0.00	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	0.00	
g) Resident Opportunity and Self-Sufficiency Grants	0.00	
h) Community Development Block Grant	0.00	
i) HOME	0.00	
Other Federal Grants (list below)	0.00	
2. Prior Year Federal Grants (unobligated funds only) (list below)		
2006 CFP	26,661.00	
2007 CFP	34,946.00	
3. Public Housing Dwelling Rental Income	47,270.00	Operations
4. Other income (list below)		
Interest	210.00	Operations
Other miscellaneous	1,060.00	Operations
4. Non-federal sources (list below)		
Total resources	\$214,693	

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)
1-2 weeks when PHA is notified of a possible vacancy
- Other: (describe)

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 NOT APPLICABLE**

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

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

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

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

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

(3) Assignment

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

- One before moving to the bottom of waiting list
- Two before being removed from waiting list
- 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)

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.

Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

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

4. Relationship of preferences to income targeting requirements:

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

(5) Occupancy

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

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

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

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

(6) Deconcentration and Income Mixing

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

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

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

Adoption of site based waiting lists
If selected, list targeted developments below:

Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments
If selected, list targeted developments below:

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

Other (list policies and developments targeted below)

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:

B. Section 8 *NOT APPLICABLE*

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)

(2) Waiting List Organization

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

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

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

- PHA main administrative office
- Other (list below)

(3) Search Time

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

If yes, state circumstances below:

(4) Admissions Preferences

a. Income targeting

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

b. Preferences

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

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

Former Federal preferences

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

Other preferences (select all that apply)

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

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

Date and Time

Former Federal preferences

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

Other preferences (select all that apply)

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

- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)

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

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

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

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

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

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

(5) Special Purpose Section 8 Assistance Programs

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

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

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

- Through published notices
- Other (list below)

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

- \$0
- \$1-\$25
- \$26-\$50 (Basile Housing Authority's minimum rent is \$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 *NOT APPLICABLE*

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: Management structure is as follows:
 1st Board of Commissioners
 2nd Executive Director (Under executive director is a part-time clerk and a parttime or hired-as-needed maintenance)

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	22	4
Section 8 Vouchers	N/A	
Section 8 Certificates	N/A	
Section 8 Mod Rehab	N/A	
Special Purpose Section 8 Certificates/Vouchers (list individually)	N/A	
Public Housing Drug Elimination Program (PHDEP)	N/A	
Other Federal	N/A	

Programs(list individually)		

C. Management and Maintenance Policies

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

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

- Admissions and Occupancy Policy
- Grievance Policy
- Pet Policy
- Sexual Harassment Policy
- Non-discrimination/Fair Housing Compliance Policy
- Financial Reporting Policies
- Capitalization Policy
- Disposition Policy
- Records Retention and Disposition Policy
- Disbursement Policy
- Inventory Policy
- Investment Policy
- Procurement Policy
- Equal Employment Policy
- Personnel Policy
- Code of Ethics
- Drug/Substance Abuse Policy
- Communications Policy
- Travel Policy
- Vehicle Policy
- Credit Card Policy
- Confidentiality of Client Information Policy
- Maintenance Plan
- Eradication of Pest Infestation Policy

(2) Section 8 Management: (list below)

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 following forms at end of Table Library.

-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 following forms at end of Table Library

-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) *NOT APPLICABLE*

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

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

1. Development name:
2. Development (project) number:
3. Status of grant: (select the statement that best describes the current status)
 - Revitalization Plan under development
 - Revitalization Plan submitted, pending approval
 - Revitalization Plan approved
 - Activities pursuant to an approved Revitalization Plan underway

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

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

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

8. Demolition and Disposition

NOT APPLICABLE

[24 CFR Part 903.7 9 (h)]

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

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

2. Activity Description

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

Demolition/Disposition Activity Description	
1a. Development name:	
1b. Development (project) number:	
2. Activity type: Demolition <input type="checkbox"/>	
Disposition <input type="checkbox"/>	
3. Application status (select one)	
Approved <input type="checkbox"/>	
Submitted, pending approval <input type="checkbox"/>	
Planned application <input type="checkbox"/>	
4. Date application approved, submitted, or planned for submission: <u>(DD/MM/YY)</u>	
5. Number of units affected:	
6. Coverage of action (select one)	
<input type="checkbox"/> Part of the development	
<input type="checkbox"/> Total development	
7. Timeline for activity:	
a. Actual or projected start date of activity:	
b. Projected end date of activity:	

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

[24 CFR Part 903.7 9 (i)]

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

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

2. Activity Description

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

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

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

11. Homeownership Programs Administered by the PHA [24 CFR Part 903.7 9 (k)]

A. Public Housing

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

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

2. Activity Description

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

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

5. Number of units affected:
6. Coverage of action: (select one)
- Part of the development
- Total development

B. Section 8 Tenant Based Assistance *NOT APPLICABLE*

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

2. Program Description:

a. Size of Program

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

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

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

b. PHA-established eligibility criteria

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

If yes, list criteria below:

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (l)]

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

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

- Yes No: Has the PHA 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-

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

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

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

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.7 9 (m)]

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

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

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

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

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)
LA 58-1

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) Neighborhood Watch Program, more police patrols

2. Which developments are most affected? (list below)
LA 58-1

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 (more frequent patrols around PHA)
- Other activities (list below)

2. Which developments are most affected? (list below) LA 58-1

D. Additional information as required by PHDEP/PHDEP Plan

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

- Yes No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes No: Has the PHA included the PHDEP Plan for FY 2008 in this PHA Plan?
- Yes No: This PHDEP Plan is an Attachment. (Attachment Filename: ____)

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

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

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

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

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

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

- 1. Yes No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock , including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and

other needs that have **not** been addressed elsewhere in this PHA Plan?

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

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

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

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

1. Yes No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s? (Version 3: No comments)

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

- Attached at Attachment (File name)
- Provided below:

The Resident Advisory Board felt that the PHA was not getting enough funds to adequately address the needs of the housing authority. All of the PHA units are in need of central heating and air conditioning because wall heaters are old, the concentration of heat is damaging the ceilings, and the A/C window units are causing damages to the windows and window sills, etc.. Also, window units pose a security risk making, in some cases, easy entry into dwelling units. The Resident Advisory Board also expressed a need for additional dwelling units.

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:

PHA Response:

On the comment on funding , it was explained that HUD allocates about \$34,000 a year to the Basile Housing Authority to be used for management improvements, A/E fees, and capital improvements. Central air and heat for all units are included in the

plan for the coming years. How long it will take will depend on the funding and other priorities that may arise which are currently unforeseen.

On the comment about building more units, it was explained that the cost of building a units is much more than the annual funding to the PHA.

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.) Appointed by mayor

3. Description of Resident Election Process

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

- Candidates were nominated by resident and assisted family organizations
- Candidates could be nominated by any adult recipient of PHA assistance
- Self-nomination: Candidates registered with the PHA and requested a place on ballot
- Other: (describe)

b. Eligible candidates: (select one)

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

c. Eligible voters: (select all that apply)

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

C. Statement of Consistency with the Consolidated Plan

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

1. Consolidated Plan jurisdiction: (provide name here)
 Office of Community Development
 State of Louisiana

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

 - Other: (list below)

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

D. Other Information Required by HUD

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

- (1) The PHA is working towards meeting the terms of the MOU with HUD. The first monthly report is attached hereto.
- (2) The PHA is working in meeting the mission and goals outlined in its previous five-year plan.
- (3) Amendment and deviation definitions:
 - a. Substantial deviation from the five-year plan: Change in the CFP budget of greater than \$500,000.
 - b. Significant amendment or modification to the Annual Plan: Reallocation of CFP funds of greater than \$250,000 among budget line items (development account numbers) and MOU with HUD

c. **Attachments (in this document)**

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

- Final Annual Performance Report for CFP LA 48P058-501-03
- Final Annual Performance Report for CFP LA 48P058-502-03
- Annual Performance and Evaluation Report for CFP LA 48P058-501-04
- Annual Performance and Evaluation Report for CFP LA 48P058-501-05
- Annual Performance and Evaluation Report for CFP LA 48P058-501-06
- Annual Performance and Evaluation Report for CFP LA 48P058-501-07
- Five-Year Action Plan
- First Monthly Report under MOU with HUD
- ACOP
- Community Service and Self-Sufficiency Policy
- Operating Budget
- VAWA Statement

PHA Plan Table Library

**SEE ANNUAL PERFORMANCE & EVALUATION STATEMENTS
FOLLOWING FOR 2003, 2004, 2005, 2006, 2007, 2008**

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

Annual Statement

Capital Fund Program (CFP) Part I: Summary

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

Original Annual Statement **SEE ATTACHED STATEMENT FOR 2008**

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	
3	1408 Management Improvements	
4	1410 Administration	
5	1411 Audit	
6	1415 Liquidated Damages	
7	1430 Fees and Costs	
8	1440 Site Acquisition	
9	1450 Site Improvement	
10	1460 Dwelling Structures	
11	1465.1 Dwelling Equipment-Nonexpendable	
12	1470 Nondwelling Structures	
13	1475 Nondwelling Equipment	
14	1485 Demolition	
15	1490 Replacement Reserve	
16	1492 Moving to Work Demonstration	
17	1495.1 Relocation Costs	
18	1498 Mod Used for Development	
19	1502 Contingency	
20	Amount of Annual Grant (Sum of lines 2-19)	
21	Amount of line 20 Related to LBP Activities	
22	Amount of line 20 Related to Section 504 Compliance	
23	Amount of line 20 Related to Security	
24	Amount of line 20 Related to Energy Conservation Measures	

Annual Statement

Capital Fund Program (CFP) Part II: Supporting Table

SEE FOLLOWING SUPPORTING TABLE FOR 2008

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

Annual Statement

Capital Fund Program (CFP) Part III: Implementation Schedule

SEE FOLLOWING IMPLEMENTATION SCHEDULE FOR 2008

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

12. Capital Fund Program

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: HOUSING AUTHORITY OF THE TOWN OF BASILE			Grant Type and Number Capital Fund Program Grant No: LA 48P 058 501-03 Replacement Housing Factor Grant No:		Federal FY of Grant: 2003
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies			<input type="checkbox"/> Revised Annual Statement (revision no: 2)		
<input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending:6/30/2007			<input checked="" type="checkbox"/> Final Performance and Evaluation Report		
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements		9,000.00	9,000.00	9,000.00
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	7,500.00	6,800.00	6,800.00	6,800.00
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	38,793.00	18,343.00	18,343.00	18,343.00
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	46,293.00	34,143.00	34,143.00	34,143.00
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				

12. Capital Fund Program

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 FO THE TOWN OF BASILE		Grant Type and Number Capital Fund Program Grant No: la 48P 058 501 03 Replacement Housing Factor Grant No:				Federal FY of Grant: 2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
La 58-1	MANAGEMENT IMPROVEMENTS:	1408			9,000.00		9,000.00	
	MTCS Submittals and technical assistance				4,000.00			
	Preparation of 2005 Five-year and annual plans				5,000.00			
LA 58-1	FEES AND COSTS:	1430		7,500.00	6,800.00	6,800.00	6,800.00	
	Retain A.E to prepare plans and contract documents and inspect work			5,000.00	4,300.00			
	Retain coordinator to assist PHA with related labor compliance and related administrative responsibilities			2,500.00	2,500.00			
LA 58-1	DWELLING UNITS	1460		38,793.00	18,343.00	18,343.00	18,343.00	
	Install central air and heat in dwelling units			38,793.00	18,343.00			

12. Capital Fund Program

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: BASILE HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: LA 48P058-502-03 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003
<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: 6/30/07		<input type="checkbox"/> Final Performance and Evaluation Report			
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	1,200		1,200	1,200
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	6,011		6,011	6,011
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	7,211		7,211	7,211
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				

12. Capital Fund Program

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: BASILE HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: LA 48P058-502-03 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
LA 58-1	FEES AND COSTS:	1430		1,200		1,200	1200	
	Retain A/E to prepare plans and contract documents and inspect work			1,000				
	Retain coordinator to assist PHA with related labor compliance and related administrative responsibilities			200				
LA 58-1	DWELLING UNITS:	1460		6,011		6,011	6,011	
	Install central air and heat in dwelling units			6,011				

12. Capital Fund Program

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule							
PHA Name: BASILE HOUSING AUTHORITY			Grant Type and Number Capital Fund Program No: LA 48P058-502-03 Replacement Housing Factor No:				Federal FY of Grant: 2003
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
LA 58-1	12/31/2005	2/12/2006	6/30/2005	12/31/2006	2/12/2008	7/31/2006	To agree with e-Loccs

12. Capital Fund Program

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: BASILE HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: LA 48P058-501-04 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no:) 3 <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 6/30/2007 <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements	2,000.00	5,000.00	5,000.00	
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	7,500.00	7,500.00	7,500.00	7,500.00
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	25,654.00	22,654.00	22,654.00	20,529.00
11	1465.1 Dwelling Equipment—Nonexpendable	4,800.00	4,800.00	4,800	4,800.00
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	39,954.00	39,954.00	39,954.00	32,829.00
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				

12. Capital Fund Program

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: BASILE HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: LA48P058-501-04 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
LA 58-1	MANAGEMENT IMPROVEMENTS			2,000	5,000	5,000		
	Technical assistance with PIC, MTCS, etc.				3,000			
	Technical assistance with annual plan				2,000			
LA 58-1	FEES AND COSTS:	1430		7,500	7,500	7,500	7500.00	
	Retain A/E to prepare plans and contract documents and inspect work				5,000			
	Retain coordinator to assist PHA with related labor compliance and related administrative responsibilities				2,500			
LA 58-1	DWELLING UNITS:	1460		25,654	22,654	22,654	20,529.00	
	Install central air and heat in dwelling units		3					
LA 58-1	DWELLING EQUIPMENT-- NONEXPENDABLE	1465. 1	10	4,800	4,800	4,800	4,800.00	
	Stoves and refrigerators							

12. Capital Fund Program

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: BASILE HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: LA48P-058-501-05 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 (revision no:)	
<input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: 6/30/07		<input type="checkbox"/> Final Performance and Evaluation Report			
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	7,500	7,500	7,500.00	6,750.00
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	32,454	27,866		
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	39,954	35,366	7,500.00	6,750.00
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				

12. Capital Fund Program

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: BASILE HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: LA 48P058-501-05 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	Revised	Funds Obligated	Funds Expended	
LA 58-1	FEES AND COSTS:	1430		7,500	7,500	7,500	6,750.00	
	Retain A/E to prepare plans and contract documents and inspect work				5,000			
	Retain coordinator to assist PHA with related labor compliance and related administrative responsibilities				2,500			
LA 58-1	DWELLING UNITS:	1460		38,793	27,866	0.00	0.00	
	Install central air and heat in dwelling units		3					

12. Capital Fund Program

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: BASILE HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: LA48P-058-501-06 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: 6/30/2007		<input type="checkbox"/> Final Performance and Evaluation Report			
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	7,500	6,500	6,500.00	0.00
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	32,454	27,641	0.00	0.00
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	39,954	34,141	0.00	0.00
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				

12. Capital Fund Program

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: BASILE HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: LA 48P058-501-06 Replacement Housing Factor Grant No:			Federal FY of Grant: 2006			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	FEES AND COSTS:	1430		7,500	6,500	6,500.00	0.00	
	Retain A/E to prepare plans and contract documents and inspect work			5,000	4,500			
	Retain coordinator to assist PHA with related labor compliance and related administrative responsibilities			2,500	2,000			
	DWELLING UNITS:	1460		32,454	27,641	0.00	0.00	
	Install central air and heat in dwelling units		3					

12. Capital Fund Program

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: BASILE HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: LA48P-058-501-07 Replacement Housing Factor Grant No:			Federal FY of Grant: 2007
<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:		<input type="checkbox"/> Final Performance and Evaluation Report			
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	10,000	9,000	0.00	0.00
8	1440 Site Acquisition				
9	1450 Site Improvement	2,000	2,000	0.00	0.00
10	1460 Dwelling Structures	38,000	23,946	0.00	0.00
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	50,000	34,946.00	0.00	0.00
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				

12. Capital Fund Program

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part II: Supporting Pages								
PHA Name: BASILE HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: LA 48P058-501-07 Replacement Housing Factor Grant No:			Federal FY of Grant: 2007			
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	
LA 58-1	FEES AND COSTS:	1430		10,000	9,000	0.00	0.00	
	Retain A/E to prepare plans and contract documents and inspect work			6,500	6,000			
	Retain coordinator to assist PHA with related labor compliance and related administrative responsibilities			3,500	3,000			
LA 58-1	SITE IMPROVEMENTS	1450		2,000	2,000	0.00	0.00	
	Replace broken sidewalks			2,000	2,000			
LA 58-1	DWELLING UNITS:	1460		38,000	23,946	0.00	0.00	
	Install central air and heat in dwelling units		5	28,800	23,946			
	Install new weatherstripping on exterior doors and new hardware			4,000				
	Replace hardware on interior locking doors			800				
	Replace heat/light/vents in bathrooms			4,400				

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name: BASILE HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: LA48P-058-501-08 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	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	9,000			
8	1440 Site Acquisition				
9	1450 Site Improvement	2,000			
10	1460 Dwelling Structures	29,000			
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collaterization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)	40,000			
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 Conservn 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: BASILE HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: LA 48P058-501-08 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	
LA 58-1	FEES AND COSTS:	1430		9,000				
	Retain A/E to prepare plans and contract documents and inspect work			6,000				
	Retain coordinator to assist PHA with related labor compliance and related administrative responsibilities			3,000				
LA 58-1	SITE IMPROVEMENTS	1450		2,000				
	Replace broken sidewalks and remove tree affecting foundation of one unit			2,000				
LA 58-1	DWELLING UNITS:	1460		29,000				
	Install central air and heat in dwelling units, remove old wall heaters, repair space, and repair damaged ceilings		5	25,000				
	Replace heat/light/vents in bathrooms		5	4,000				

SEE FOLLOWING 5-YEAR ACTION PLAN

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

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

Optional 5-Year Action Plan Tables				
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development	
Description of Needed Physical Improvements or Management Improvements			Estimated Cost	Planned Start Date (HA Fiscal Year)
Total estimated cost over next 5 years				

Capital Fund Program Five-Year Action Plan
Part I: Summary

PHA Name BASILE HOUSING AUTHORITY		<input type="checkbox"/> Original 5-Year Plan <input type="checkbox"/> Revision No:			
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2009 PHA FY:	Work Statement for Year 3 FFY Grant: 2010 PHA FY:	Work Statement for Year 4 FFY Grant: 2011 PHA FY:	Work Statement for Year 5 FFY Grant: 2012 PHA FY:
LA 58-1	Annual Statement	Complete modernization of 2 H/C dwelling units	Complete modernization of 2 dwelling units	Complete modernization of 2 dwelling units	Complete modernization of 2 dwelling units
CFP Funds Listed for 5-year planning		\$40,000	\$40,000	\$40,000	\$40,000
Replacement Housing Factor Funds					

Capital Fund Program Five-Year Action Plan						
Part II: Supporting Pages—Work Activities						
Activities for Year 1	Activities for Year :2009 FFY Grant: 2009 PHA FY: 2009			Activities for Year: 2010 FFY Grant: 2010 PHA FY: 2010		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	LA 58-1	<i>Modernization of 2 H/C dwelling units</i>	40,000	LA 58-1	<i>Modernization of 2 dwelling units</i>	40,000
Annual Statement						
Total CFP Estimated Cost			\$40,000			\$40,000

Public reporting and recordkeeping burden for the collection of information is estimated to average 48 hours depending on the size of Public Housing Agency (PHA). This includes the time for collecting, reviewing, and reporting the data. The information will be used for monitoring PHA progress in bringing performance up to standard levels. Response to this request for information is required in order to receive the benefits to be derived, including eligibility to apply for funding. This agency may not collect this information, and you are not required to complete this form unless it displays a currently valid OMB control number.

PHA Name: **BASILE HOUSING AUTHORITY**

PHA FYE: **12/31**

MOA Term: **11/1/2007 thru 10/31/2008**

Monthly Progress Report

for
Reporting period ending
11/11/2007 – 11/30/2007

I certify that

all of the information in this report is true and accurate, to the best of my knowledge;
this information has been/will be shared with the Board.

Typed name: Jane Richard
Typed title Executive Director

2/14/2007
Date

Operational Area:

1. GOVERNANCE

Targets and Strategies	Final Performance Target	Actual Completion Dates	Comments
1.1 Establish PHA Board compliance with bylaws and applicable State laws. [Reference: 24 CFR 811.105; State Law, 1937 Act as amended]	11/30/07		
A. Develop, and adopt by-laws.		11/12/2007	
B. Conduct annual Board meeting and elect officers.			This was done early in 2007.
C. Review the time, date and place of the regular meetings and amend if necessary.			Not necessary at this time. Regular meetings will be held as scheduled and special meetings as needed.
D. Comply with State Open Meeting Law, including posting notification as appropriate.			Notifications posted at PHA office.
1.2 Require Appointing Officials to comply with Board members' terms consistent with State Law. [Reference: 24 CFR 811.105; State Law, Local Law]	11/30/2007	11/13/2007	Terms of board are staggered. Terms traced forward from a 1987 General Certificate. See attachment.
A. Assess appointment of Board members in accordance to State Statute.			Copy of terms of current board members is attached.
B. Update and maintain Oath of Office Certificates for all Board Members.			Please send copy of this form to us.
Update and maintain Certificate of Appointment for Board of Commissioners; provide copies to HUD as appropriate.			Copy of terms of current board members is attached.
C. Develop/maintain permanent tracking system of Commissioners' appointments.		11/13/2007	A tracking sheet has been set up.
1.3. Take steps to enforce rights under Cooperation Agreement [Reference: 24 CFR 811.105; State Law, Local Law]	11/30/2007	1/31/2008	Cooperation agreement will be taken up at January 2008 meeting of the Town Council.
A. Develop, Review and discuss dedication of streets to the local government			All streets belong to the town.
B. Review and discuss baseline police services.			Police services excellent.
C. Review and discuss baseline public services (e.g. water, sewer, trash collection, snow & ice removal, fire protection, ambulance/emergency services).			These are good.

D. Review and discuss Payment in Lieu of Taxes (PILOT).			Letter sent to the town. Copy previously submitted.
E. Adopt necessary resolutions and execute MOUs between Housing Authority and appropriate local government agencies to resolve deficiencies under the Cooperation Agreement.			Letter sent to Town. Verbal assurance that town will clean up and maintain street side drainage has been received. A written assurance has been requested.

Operational Area:

2. ORGANIZATION AND STAFFING

Targets and Strategies	Final Performance Target	Estimated & Actual Completion Dates	Comments
2.1 Develop, adopt and implement PHAs Administrative Policies. [Reference: 24 CFR 85.36, 965.201, HUD Guidebooks 7401.7 & 7401.1]	1/31/2008		
A. Personnel Policy.		10/9/2007	Adopted 10/9/2007. Copy attached.
B. Standard of Conduct Policy.		10/9/2007	Code of Ethics Policy adopted 10/9/2007. Copy attached.
C. Use of PHA Vehicle and Equipment policy and procedures.		2/28/2008	Under development.
D. Record retention policy.		10/9/2007	Copy attached.
E. Travel Policy.		10/9/2007	Copy attached.
2.2 Develop a training plan for staff on general program administration.[Reference: HUD Guidebook 7401.7]	1/31/2008	1/31/2008	Trying to find some trainings in Louisiana in order to minimize cost. Hope to have a plan ready by end of January 2008.
A. Ethics training			
B. Formal and on the job program training.			
C. Personnel policy basic training.			
D. PHAS Training.			
E. Procurement Training.		9/12/2007	Received at LHC conference in Marksville 9/12/2007.
F. Basic finance procedures for non-finance staff.			
2.3 Review, Develop and Implement Position Descriptions and Staff Performance Standards. [Reference: HUD Guidebooks 701.1 & 7401.7]	4/30/2008	4/30/2008	In development. Consulting with nearby PHAs for advice.
A. Develop position descriptions and performance standards; include physical requirements and develop descriptions for those missing.			
B. Implement position descriptions and performance standards.			
C. Obtain employee signature and place a copy in their personnel file.			
D. Conduct evaluation of staff performance and document in accordance with Personnel Policy.			

E. Evaluate existing staff performance standards and revise as necessary.			
2.4 Establish and maintain employee records in accordance with Personnel Policy. [Reference: HUD Guidebooks 701.1 & 7401.7]	1/31/2008	1/31/2008	Currently personnel records are maintained by fee accountant. Originals will be kept in a secure file in PHA office.
A. Develop tracking register to track accrued annual and sick leave.			
B. Acquire staff certification on issuance of job descriptions and performance standards.			
C. Obtain W-4 exemption forms on all staff.			Will have new forms completed to be used beginning January 2008
D. Maintain copies of annual evaluations and employee concurrence in accordance with personnel policy.			
I. Maintain current employee address, phone number, and emergency contact information.			These are currently on file in PHA office.

Operational Area:

3. FINANCE AND PROCUREMENT

Indicator #:	PHAS Performance Targets Name:	Previous Quarter Actual	Current quarter target	1 st month (mm/yy) actual	2 nd month (mm/yy) actual	3 rd month (mm/yy) actual
2-1	Current ratio					
2-2	Expendable Fund Balance					
2-3	Tenant Receivable/Outstanding					
2-5	Expense Management/Utilities					
2-6	Net Income/Loss Divided by the Expendable Fund Balance					
Targets and Strategies						
		Final Performance Target	Estimated & Actual Completion Dates	Comments		
3.3 Reduce Tenant Receivables Outstanding (Average number of days tenant receivable are outstanding. The gross tenant accounts receivable at year end divided by the total tenant revenue/ 365). [Reference: 24 CFR 902, Subpart C]		11/30/2007	1/1/2008	Rental register will be maintained on site.		
D. Develop tracking method for tenant receivables.						
E. Assure the rent collection policies include the following and are uniformly applied: (See also Performance Target 4.1)				Rent collection policy is part of ACOP but it is being reviewed to include Items E.1 through E.5.		
1. Timely evictions						
2. Effective write-off policies						
3. Use of Collection Agency						
4. Home visits						
5. Repayment Agreements						

3.5 Expense Management/Utilities. Review and adjust or reduce expenses as appropriate. (The expense per unit/month for key expenses, including: administration, general (PILOT), tenant services, protective services, maintenance and operations and utility expenses as adjusted for PHA size and geographical area). [Reference: 24 CFR 902, Subpart C]	8/31/2008	8/31/2008	Beginning December 2007, fee accountant will provide PHA with monthly financial reports which will include all PHA expense categories.
A. Develop tracking method for expenses and utilities.			
B. Analyze spending patterns and develop recommendation for cost-cutting strategies.			
C. Verify that costs are correctly classified and allocated. (Refer to Performance Target 3.14.)			
D. Progress report to Board Monthly & HUD quarterly.			Beginning December 2007, monthly financial reports will be shared with Board at Board meeting following end of month.
3.6 Improve Net Income/Loss Ratio (Measures how the year's operations have affected the PHA's viability.) [Reference: 24 CFR 902, Subpart C]	8/31/2008	8/31/2008	
A. Develop tracking method for net income/loss and fund balance.			
B. Analyze income and expenses to assure a balanced budget or positive cash flow.			
C. Revise budget based on analysis.			
D. Report with status report to the Board monthly & HUD quarterly. Assure income and expenses are in compliance with the latest approved budget.			
3.7 Comply with OMB Circular A133 by completing and submitting the Annual Audit. [Reference: OMB Circular A-133, 24 CFR 990.120, OIG]	6/30/2008	6/30/2008	Advertising for proposals from qualified firms to perform audit for 2007. Copy of ad is attached.
A. Assure timely submission.			
B. Assure findings are resolved timely.			
C. Resolve any questioned costs.			
D. Determine audit requirement for small PHAs.			
3.8 Determine the PHA's total Financial Resources (Include other Federal, State, local and Non-profit, etc.). [Reference: Public	3/31/2008	3/31/2008	

Housing Reform Act of 1998, Five Year Plan]			
A. Evaluate and report on the PHA's long-term financial stability.			
B. Analyze future income streams from dwelling and non-dwelling rental income (Welfare to Work, Mixed Income).			
3.9 Develop and maintain an Investment Register. [Reference: HUD Guidebook 7510.1]	3/31/2008	3/31/2008	
I. Analyze potential for increasing investment income.			
3.10 Acquire and maintain adequate insurance coverage. [Reference: HUD Guidebooks 7401.5 & 7510.1; 24 CFR 965.201]	1/31/2008	1/31/2008	Under development
D. Develop and maintain Insurance Register to track policies.			
1. Property (Fire and Extended coverage).			
2. Fidelity Bond.			
3. General Liability (Owner Landlord and Tenant Liability).			
4. Vehicle.			
5. Flood.			
6. Workers' Compensation.			
3.12 Review Property Inventory Practices and implement necessary procedures. [Reference: HUD Guidebook 7510.1]	12/31/2007	3/31/2008	This will take additional time as the 12/31/2007 is very close.
A. Develop and maintain a property ledger.			
B. Conduct annual physical inventory of dwelling/non-dwelling equipment.			
C. Conduct annual physical inventory of maintenance and other expendable supplies. (See also Performance Target 5.6.)			
D. Adjust the property ledger and inventory accounts, based on results of physical inventory. (See also Performance Target 5.6.)			
3.13 Execute/update General Depository Agreement. [Reference: Annual Contributions Contract; HUD Guidebook 7410.0]	12/31/2008	10/30/2007	Previously submitted. Finding resolved by HUD.
3.14 Allocate costs accurately among programs. [Reference: OMB Circular A-87]			
E. HUD will provide technical assistance in establishing the allocation of administrative costs.			

F. Develop/update the allocation plan.			
G. Evaluate the impact and accuracy of the allocation plan.			
3.15 Improve financial management of the PHA. [Reference: HUD Guidebooks 7510.1 & 7475.1]	3/31/2008	3/31/2008	
E. Develop, adopt, and implement Financial Management Policies.			
1. Disposition policy.			
2. Capitalization policy.			
3. Collection Losses/Charge-off policy.			
4. Check Writing Authorization policy.			
5. Cash Overages/Shortages policy.			
6. Investments policy.			
7. Cash Management/Internal Procedures policy.			
8. Petty Cash policy.			
3.16 Improve timely preparation/submission of reports to HUD. [Reference: HUD Guidebook 7510.1]	1/31/2008	2/28/2008	Next submittal of unaudited financial statements by fee accountant.
A. Budgets.			Copy attached for 2008.
B. Statement of Operating Receipts and Expenditures Statement (SORES).			
C. Financial Data Schedule (FDS).			
D. Tenant Accounts Receivable (TAR)/Occupancy.			
E. Electronic Submission for Subsidy and Grants Information System (SAGIS).			
3.17 Provide PHA Technical Assistance and/or Training in Financial Planning. [Reference: OIG Issues]			
F. Budgeting (PHA-wide, program specific and departmental).			
G. Financial Management:			
1. Include bookkeeping (formal) and cash management/internal controls for Executive Director.			
2. Basic financial training for non-financial staff and Board.			

H. Financial Management Policies (Refer to Performance Target 3.15.)			
3.18 Improve PHA procurement practices. [Reference: 24 CFR 85.36; HUD Guidebook 7460.8]	1/31/2008	1/31/2008	Currently following policy.
A. Develop/update, adopt and implement Agency-wide Procurement Policy and Contract Administration Procedures to include PHA, HUD, OMB and State requirements.		10/9/2007	
B. Evaluate the use of annual indefinite delivery/blanket purchase agreements to promote cost savings.			
C. Conduct cost analysis and estimate for all procurement actions.			
D. Identify and define types of contracts for construction, supplies, professional services and non profit entities.			
E. Identify and define competitive and non-competitive methods and requirements including small purchases, petty cash, sealed bids, RFP/RFQ, MBE/WBE, Section 3			
F. Develop contract administration procedures to include identification of Contracting Officer and Contracting Officer Representative, Initial Meeting, Progress reports and monitoring, Default notices, Payment schedules and approvals, Final audit and/or close out.			Contracting officer is executive director. CFP files contain all of this information.
G. Establish contracting file system			A contract file is maintained on each construction project.
H. Develop an annual procurement plan.			Procurement for significant services are obtained by publishing an RFP or RFQ or by solicitation.
3.20 Provide PHA Technical Assistance and/or Training in Procurement to include: [Reference: 24 CFR 85.36]	4/30/2008	4/30/2008	Procurement training received at LHC conference in Marksville 9/13/2007.
A. HUD procurement requirements (24CFR85.36)			
B. OMB grant administration requirements			
C. State requirements			
D. PHA Procedures and Policy compliance			
E. Contracts for construction, supplies, professional services and non-profit grantees			
F. Procurement Planning (See Performance Target 3.18)			

G.	Cost analysis and estimating			
H.	Competitive methods and requirements			
I.	Protests and appeal procedures			
J.	Consolidated supply lists and similar sources			
K.	Contract file system			PHA has had contract file system for several years.

Operational Area:

4. HOUSING MANAGEMENT

PHAS Performance Targets		Previous Quarter Actual	Current quarter target	1 st month (mm/yy) actual	2 nd month (mm/yy) actual	3 rd month (mm/yy) actual
Indicator #:	Name:					
3-1	Vacant Unit Turnaround Time					
2-4	Occupancy Loss					
Targets and Strategies		Final Performance Target	Estimated & Actual Completion Dates	Comments		
4.1 Comply with current requirements regarding admission and occupancy of Public Housing. [Reference: 24 CFR 960.205; Public Housing Reform Act of 1998, Section 578; HUD Guidebook 7465.1, Chapter 5]		1/31/2008	1/31/2008			
A. Review, and revise as necessary, the PHA's Public Housing Management and Admissions and Occupancy policies to comply with current requirements of the Public Housing Reform Act of 1998. Include as a minimum:			10/9/2007	Adopted a revised policy, which as best we can determine, meets the requirements. But we will review it again.		
1. One Strike Policy.						
a) Establish the One Strike screening criteria.						
b) Develop screening methods that prohibit admission of any household that includes a member who the housing authority determines is: illegally using a controlled substance or alcohol; subject to a lifetime registration required under a State sex offender registration program; or whose behavior would adversely affect other housing tenants in accordance with the One-Strike screening criteria.						
2. Revise tenant selection and admission procedures to eliminate outdated requirements and local preferences.				No local preferences included.		
3. Develop a De-concentration Policy.						
4. Develop and or revise Resident Charges List.				Under review.		
5. Develop Utility Allowances Schedule.				Cannot be compiled until Energy Audit is done.		

6.	Security Deposit.			
7.	Rent Collection Policy.			Part of ACOP.
8.	Grievance Policy			Adopted 10/9/2007 (Correction)
9.	Pet Policy.			Adopted 10/9/2007 (Correction)
10.	Establish a Minimum and Flat Rent.			Part of ACOP
11.	Establish a procedure/contingency plan to allow over-housing when units would otherwise remain vacant.			Part of ACOP
12.	Transfer Policy.			Part of ACOP
II.	Post revised policies for 30-day comment period			
III.	Adopt and implement revised policies			
D.	Provide training on revised policies to staff.			
.A	Communicate with residents regarding the impact of revised policies.			
.B	Develop Security Policies and Procedures for UIV/EIV			
4.2	Develop and maintain waiting list in accordance with Admissions and Occupancy Policy. [Reference: HUD Guidebook 7465.1; Public Housing Reform Act of 1998]	12/31/2007	12/31/2007	Waiting list is being maintained.
D.	Develop all application files in accordance with Admissions and Occupancy Policy.			
E.	Develop formal letter of eligibility/ineligibility.			
F.	Develop formal letter of offer for vacant units.			
G.	Develop transfer list in accordance to Admissions and Occupancy Policy.			
H.	Purge waiting list every twelve months.			
4.3	Resolve legal and operational problems with existing dwelling lease. [Reference: 24 CFR 966.1-7]	1/31/2008	1/31/2008	Under review
A.	Review/Revise dwelling lease; verify compliance with requirements of Public Housing Reform Act of 1998.			
B.	Provide families 30-day comment period.			
C.	Execute lease/Lease addendum with all adult members of household signing; provide 30-day notice of rent changes.			
D.	Enforce dwelling lease provisions.			

4.4 Conduct Annual Re-exams in a timely manner. [Reference: 24 CFR 960.209, 990.113]	11/30/2008	11/30/2008	On-going.
I. Develop tracking register for annual re-exams and inspections.			Developing a tracking system.
II. Develop formal letter to include date and time of resident interviews, documentation required, date and time of annual inspection. Notify residents of interview time slots assigned.			
III. Conduct interviews and review documentation submitted by residents and obtain "release of information," HUD-9886 form.			
IV. Mail "release of information" HUD-9886 forms to third party sources.			
V. Assess all occupancy files for accuracy and required documentation.			
VI. Complete calculation of income, assets, deductions, prepare lease addendum, HUD 50058s. Execute required documents, as applicable.			
H. Provide 30-day notice of rent change.			

Operational Area:

5. PROPERTY MAINTENANCE

PHAS Performance Targets		Previous Quarter Actual	Current quarter target	1 st month (mm/yy) actual	2 nd month (mm/yy) actual	3 rd month (mm/yy) actual
Indicator #:	Name:					
1	Physical Conditions					
3-3a	Emergency WOs					
3-3b	Non-emergency WOs					
3-4a	Unit inspections					
3-4b	System inspections					
Targets and Strategies		Final Performance Target	Estimated & Actual Completion Dates	Comments		
5.1 Enhance staff qualifications and capabilities. [Reference: 24 CFR 5.701-705]		4/30/2008	6/30/2008	After talking to other PHAs and civil service, it may take until end of June 2008 to hire one because of all the paperwork necessary.		
I.	Hire a maintenance employee					
II.	Assess maintenance employee skills and determine employee training needs.					
III.	Obtain and conduct training to enhance employee skills.					
IV.	Provide training on REAC inspection procedures and standards.					
5.2 Improve Work Order (WO) Performance. [Reference: 24 CFR 901.25, 902.43(a)(4)]		2/29/2008	2/29/2008	We are currently maintaining a work order.		
D.	Correct or abate emergency WOs within 24 hours or less.			Being done.		
E.	Complete all Non-Emergency WOs within an average of 30 days or less.			Being done.		
F.	Complete all Vacancy Preparation WO's completed within an average of 21 days or less and ensure that UPCS or more stringent local standards are met.			Trying to do this. Sometimes takes longer to get apartment ready for reoccupancy.		

G. Determine existing performance and establish standards of productivity for maintenance performance.			
G. Develop and implement an effective quality control system for all aspects of maintenance.			
H. Develop tracking log/system capable of tracking completed and open WOs. The log must continue to track all Work Orders deferred to Modernization through completion in the Modernization Program.			
I. Evaluate feasibility of automated work order system.			
J. Identify deficiencies and revise work order form. Form should, at a minimum, be sequentially numbered and include:			Under revision.
1. Type;			
2. Start date/time;			
3. Complete date/time;			
4. Cost;			
5. Tenant charges;			Under review.
6. Material use/cost.			
K. Submit updated Work Order Log monthly to Board & quarterly to HUD.			
5.3 Improve Maintenance operations. [Reference: PIH Notice 97-36, 64 FR 33708 dated 6/23/99]	None indicated.		
L. Develop a Maintenance Plan to include, as a minimum, the following:			Maintenance plan adopted 10/9/2007 but it is being reviewed for revisions.
1. WO Procedures.			
2. WO Classifications (emergency vs. non-emergency etc.).			
.A Schedule for Inspections of units, buildings, sites, and systems.			
3. Work Schedules.			
4. Vacancy Preparation.			
5. Scheduled Preventive Maintenance.			
6. Service Contracts.			
7. Purchase Order/Blanket Purchase Order.			
8. Action plan relating to contracting vs. In-house.			

9.	Annual Maintenance Budget.			
10.	UPCS Inspection Criteria for buildings/systems.			Following these during annual inspections.
11.	Quality control procedures (inspections, quality of work, wrench time, etc.).			
12.	Cyclical maintenance schedule, to include curb appeal issues.			
M.	Implement the Maintenance Plan			
N.	Assess the effectiveness of the Maintenance Plan and adjust as needed.			In process.
	5.4 Improve Physical Condition score. [Reference: 24 CFR 901.30, 902.23, 902.43(a)(5)]	4/30/2008	4/30/2008	Non-routine maintenance included in CFP
V.	Analyze the most recent REAC Physical Condition inspection report to identify widespread deficiencies.			
D.	Develop and implement a plan to correct identified deficiencies.			
E.	Develop a plan to improve the condition and appearance of the building exteriors and sites (curb appeal).			
F.	Schedule a limited inspection of all developments to prepare for REAC inspection.			
G.	Report progress to Board/HUD.			
I.	Develop a unit inspection schedule.			
J.	Address REAC PHAS inspection deficiencies and report progress to Board/HUD.			
K.	Submit report of progress to Board monthly & HUD quarterly.			

Operational Area:

6. RESIDENT SATISFACTION

PHAS Performance Targets		Previous Quarter Actual	Current quarter target	1 st month (mm/yy) actual	2 nd month (mm/yy) actual	3 rd month (mm/yy) actual
Indicator #:	Name:					
4	Resident satisfaction					
3-6	Economic uplift & self sufficiency					
Targets and Strategies		Final Performance Target	Estimated & Actual Completion Dates	Comments		
6.1 Increase involvement and participation by community service agencies. [Reference: Public Housing Reform Act of 1998]		4/30/2008	4/30/2008			
A. Survey residents to determine needs/wants for community services and survey community to determine what services are available.						
B. Establish partnerships with community entities such as colleges, churches, retailers, banks, foundations, civic groups, social service providers to provide services and/or in-kind contributions (space, funds, materials, staff time/expertise) for the benefit of PHA residents.						
C. Develop Community Service Policy and implement.				Adopted 10/9/2007.		
D. Provide notice to resident of requirement.						

Operational Area:

7. CAPITAL FUNDS

Indicator #:	PHAS Performance Targets Name:	Previous Quarter Actual	Current quarter target	1 st month (mm/yy) actual	2 nd month (mm/yy) actual	3 rd month (mm/yy) actual
3-2a	Funds unexpended					
3-2b	Funds unobligated					
3-2c	Quality of work					
3-2d	Contract administration					
3-2e	Budget controls					
Targets and Strategies						
		Final Performance Target	Estimated & Actual Completion Dates	Comments		
7.1 Improve the physical condition and long-term viability of the developments. [Reference: 24 CFR 968.315, 903.1-11]		4/30/2008	4/30/2008			
A. Conduct a comprehensive physical needs assessment by development.						
B. Evaluate, prioritize and develop the five year action plan to include the comprehensive physical needs assessment.						
C. Determine viability of all public housing developments for continued use as public housing.						
D. Incorporate the results in the PHA Annual and Five Year Plans.						
7.3 Establish more effective budget controls and capital fund tracking procedures. [Reference: 968.320, 902.43(a)(2)]		12/31/2007	12/31/2007			
A. Assure proper authorization and training of personnel accessing LOCCS.				Done		
B. Develop an effective capital fund tracking procedure.				Being done		
C. Submit P&E/semi-annual progress reports on a timely basis..				Being done with PHA plan and at end of program.		
D. Update obligations & expenditures quarterly and call into LOCCS.				Usually on time.		
		12/31/2007	2/28/2007	Did not receive any proposals under first solicitations.		

7.5 Comply with energy audit requirements. [Reference: 24 CFR 965.302]			Sending another RFP.
A. Have an Energy Audit Performed and Incorporate results of Energy Audit in five year plan.			
B. Determine feasibility of Energy Performance Contracting.			
C. HUD to provide Technical Assistance as required.			
7.6 Comply with environmental requirements. [Reference: 24 CFR Part 50]	12/31/2007	2/28/2008	
A. Update Environmental Assessment Annually.			
B. Incorporate results of environmental assessment in five year plan.			
C. HUD to provide Technical Assistance as required.			
7.7 Reduce the findings and risk of findings in the administration of capital funds programs. [Reference: 24 CFR 85.36; HA Procurement Policy]	12/31/2007	12/31/2007	Working closely with A/E in developing contract documents on work to be done. Communicating weekly.
A. Develop effective contract administration procedures for the Architect-Engineer (A/E).			
B. Comply with Procurement Policy and CFR 85.36.			
C. Establish periodic (Weekly, monthly, etc.) progress meetings with A/E & PHA.			
D. Establish quality control(s) during preparation and development of Construction Contract Documents.			
E. Develop effective PHA procedures for administering the A/E contract. (See Performance Target 3.18)			
F. Monitor compliance with A/E Contract/Agreement.			

ATTACHMENT D: MOST RECENT BOARD APPROVED OPERATING BUDGET

The Housing Authority does not have the computer capability to attach a PDF file so we will have to e-mail it separately to the HUD New Orleans Office.

ATTACHMENT E:

LIST OF RESIDENT ADVISORY BOARD MEMBERS:

Dwina A. Manuel
P O Box 533
Basile, LA 70515

Marjorie A. Rougeau
P O Box 32
Basile, LA 70515

Rebecca E. Benoit
1513 Hudson Avenue, NO. 18
Basile, LA 70515

**ATTACHMENT F:
RESIDENT BOARD MEMBER**

Marjorie Rougeau
P O Box 32
Basile, LA 70515

Term of Office: 9/1/2007 through 6/30/2010

ATTACHMENT G:
Guidelines for Administration of
Community Service and Self-Sufficiency Work Activities

Basile Housing Authority

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General Information

New Community Service Requirements

Background

The Quality Housing and Work Responsibility Act of 1998 (QHWRA) was signed into law by President Clinton on October 21, 1998. This Act is sometimes called the public housing reform act and the final rules required by QHWRA were published in the Federal Register on March 29, 2000. 24 CFR-Subpart F, 960.00 lists the statutory requirements, which must be incorporated by local PHA/PHC, etc into policy to meet, community Service/Self-Sufficiency work activities.

What is Community Service?

Community Service is defined as the performance of *voluntary* work, or duties that are a public benefit and serve to improve the quality of life, to enhance resident self-sufficiency, or increase resident self-responsibility in the community. Community Service is not employment and may not include political activities.

Who must comply?

The final rule requires **all** adult family members who do not qualify for a statutory exemption.

Who is exempt?

An **exempt** person is an adult family member who:

- (1) Is **62** years of age or older;
- (2) Is blind or disabled as defined under the current Social Security Act. Existing documentation will be acceptable as evidence of a disability and disabled persons will be permitted to **self-certify** as to whether they **cannot** perform community service or self-sufficiency service provisions; or is a primary care giver to such above defined individual;
- (3) Is engaged in work activities;
- (4) Meets the requirements for being exempted under a State program funded under part A of the title IV of the Social Security Act (42 U.S.C. 601) or any other State administered welfare program of the State in which the PHA is located, including a welfare-to-work program.

- (5) Is a family member receiving assistance, benefits or services under a state program funded under part A of title IV of the Social Security Act (42 USC 601 et seq.) or under any other welfare program of the State in which the Housing Authority is located.

What is the Annual Obligation?

Each adult family member who is not exempt must:

- (1) Contribute **8 hours per month (96 hours per year)** of Community Service, or
- (2) Participate in an economic self-sufficiency program for the same hours per year; or
- (3) Perform a *combination* of the activities in (1) and (2) for the same number of hours required above: *8/month – 96/year*.

What happens when someone does not comply?

The lease specifies that it shall be renewed automatically for all purposes, unless the family fails to comply with the community service requirement. Violation of the service requirement is grounds for non-renewal of the lease at the end of the 12-month lease term, but not for the termination of tenancy during the course of the 12-month lease term prior to the recertification process.

In addition, each family member who fails to complete its entire obligation shall be given the opportunity to develop a plan with PHA approval to perform these non-compliant hours in addition to their regularly obligated 96 hours in the second year of residency. At the end of the second year if all outstanding obligated hours of community service/self-sufficiency are not met the PHA may commence eviction proceedings.

When does the Community Service Requirements start?

All PHAs and residents must comply with the requirements of subpart F beginning with a PHAs fiscal year that begin on or after October 1, 2000.

How does the PHA administer its program?

The PHA may administer qualifying community service or economic self-sufficiency activities directly through its own staff or through a third party community entity that has an agreement with the PHA.

PHA Responsibilities to its residents.

- (1) The PHA must develop a policy that describes how it will determine which family members are subject to or exempt from performing the service requirement and the process for verifying changes to existing status.
- (2) The PHA must provide every family a written description of the service requirement and the process for claiming status. The PHA must also notify each adult family member of its initial determination of exempt and non-exempt status.
- (3) The PHA must review family compliance with the service requirements and must verify such compliance annually at least 30 days before the renewal of the lease (Annual Re-Certification).
- (4) The PHA must retain reasonable documentation of service requirement performance or exemption in the resident's file folder.

ii. **Program Administration**

The Basile Housing Authority's policy is designed to identify which adult family members are subject to or exempt from the service requirements; to explain how the PHA will administer its program; to identify PHA and/or third party certification opportunities available to eligible adult family members; and to assure resident compliance with identified work activities with fair and equitable actions.

PHA Responsibilities

(1) Eligibility Determination

The PHA will review every existing resident file to determine each Adult member's status regarding community service per the following guidelines.

- a. An **exempt** person is an adult family member who:
 - iii. Is **62** years of age or older;
 - iv. Is blind or disabled as defined under the current Social Security Act. Existing documentation will be acceptable as evidence of a disability and disabled persons will be permitted to **self-certify** as to whether they **cannot** perform community service or self-sufficiency service provisions; or is a primary care giver to such above defined individual;
 - v. Is engaged in work activities;
 - vi. Meets the requirements for being exempted under a State program funded under part A of the title IV of the Social Security Act (42 U.S.C. 601) or any other State administered welfare program of the State in which the PHA is located, including a welfare-to-work program.
 - vii. Is a family member receiving assistance, benefits or services under a state program funded under part A of title IV of the Social Security Act (42 U.S.C. 601 et seq.) or under any other welfare program of the State in which the Housing Authority is located.
- a. As family status is determined a registered letter or other certifiable document of receipt will be sent to each adult member of that family to notify them of their status (exempt or non-exempt) and explaining the steps they should immediately proceed with through their housing representative.

- b. The PHA will include a copy of the general information section of its Community Service Policy and a listing of PHA and/or third party work activities that are eligible for certification of the community service requirement.
- c. At the scheduled meeting with each non-exempt adult family member, not only will the parameters of the community service requirement be reviewed but also the PHA and/or third party work activities will be identified and selected for compliance with the annual obligation for certification at their annual lease renewal date.

(2) Work Activity Opportunities

The Basile Housing Authority has elected to provide to those adult family members that must perform community service activities the opportunity to select either PHA sanctioned work activities or Third Party certifiable work items. The administration of the certification process would be:

a. PHA Provided Activities.

When qualifying activities are provided by the Authority directly, designated Authority employee(s) shall provide signed certification that the family member has performed the proper number of hours for the selected service activities.

b. Third Party Certification

When qualifying activities are administered by any organization other than PHA, the family member must provide signed certification (see III A (c)) to the Authority by such third party organization that said family member has performed appropriate service activities for the required hours.

c. Verification of Compliance.

The Authority is required to review family compliance with service requirement, and must verify such compliance annually at least thirty (30) days before the end of the twelve (12) month lease term (annual re-certification time). Evidence of service performance and/or exemption must be maintained in the participant files.

d. Notice of Noncompliance.

If the Authority determines that, a family member who is subject to fulfilling a service requirement, but who has violated the family's obligation (a noncompliant resident) the Authority must notify the specific family member of this determination.

The Notice of Noncompliance must:

1. Briefly, describe the noncompliance (inadequate number of hours).
2. State that the Authority will not renew the lease at the end of the twelve (12) month lease term unless:

The resident or any other noncompliant adult family member enters into a written agreement with the Authority to cure the noncompliance and in fact perform to the letter of agreement.

- Or -

The family provides written assurance satisfactory, to the PHA that the resident or other noncompliant adult family member no longer resides in the unit. This Notice of Noncompliance must also state that the resident may request a grievance hearing and that the resident may exercise any available judicial remedy to seek timely redress for the Authority's non-renewal of the lease because of a noncompliance determination.

e. Resident agreement to comply with the service requirement.

The written agreement entered into with the Authority to cure the service requirement noncompliance by the resident and any other adult family member must:

1. Agree to complete additional service hours needed to make up the total number of hours required over the twelve (12) month term of the new lease.
2. State that all other members of the family subject to the service requirement are in current compliance with the service requirement or are no longer residing in the unit.

- f. The Basile Housing Authority has developed the following list of Agency certifiable and/or third party work activities of which each non-exempt adult family member can select to perform their individual service requirement.

The Authority has identified the following PHA certifiable activities, which are available to meet the requirements:

- Neighborhood Watch
- Daily Phone Monitor for elderly
- Daily Phone Monitor for disabled
- Welcome Wagon Attendant
- Playground Monitor
- Or other certifiable activities

The following third party entities have entered into agreement with the Authority to provide activities available to satisfy the Community Service activities:

Religious Organizations

- Name
- Address
- Phone Number
- Contact person

Qualified activities

- Phone bank
- Out reach
- Food service (soup kitchen)
- Or other certifiable activities

Schools

- Name
- Address
- Phone Number
- Contact person

Qualified activities

- PTA Volunteer
- Library Aide
- Hall Monitor
- Playground,
- or other certifiable activities

Hospitals

- Name
- Address
- Phone Number
- Contact person

Qualified activities

- Reception
- Candy Striper
- or other certifiable activities

iii. Documentation

Resident Notification Letter

PHA Certification Form

Third Party Certification Form

Community Service Exemption Certification

Memorandum Of Understanding

Physician Disability/Handicapped Verification Form

COMMUNITY SERVICE COMPLIANCE CERTIFICATION

I have received a copy of, have read and understand the contents of the Basile Housing Authority's Community Service Policy as required by HUD through the Quality Housing and Work Responsibility Act of 1998.

I understand that I must perform 96 hours of community service per year at no less than 8 hours per month per this requirement. I further understand that if I do not comply with this requirement that my lease will not be renewed.

ADULT FAMILY MEMBER

DATE

BASILE HOUSING AUTHORITY

HOUSING AUTHORITY CERTIFICATION FORM
Housing Authority Community Service Work Activities

I _____ an
adult family member of the household that resides at

_____, do acknowledge
STREET ADDRESS **CITY, STATE**
that, I am required to complete 8 hours of Community Service per month and/or 96
hours per year to remain eligible for the Annual renewal of my lease.

Signature

<u>ACTIVITY(S) PERFORMED</u>	<u>HOURS COMPLETED</u>
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
TOTAL HOURS	_____

This service was performed during the month of _____, 20_____.

Signature
Housing Authority Representative

Date Signed

BASILE HOUSING AUTHORITY

THIRD PARTY CERTIFICATION FORM Housing Authority Community Service Work Activities

I _____ an adult family member of the household
that resides at

_____, do acknowledge
Street address City, State
that, I am required to complete 8 hours of Community Service per month and/or 96 hours per year to remain eligible for
the Annual renewal of my lease.

Signature

<u>ACTIVITY(S) PERFORMED</u>	<u>HOURS COMPLETED</u>
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____

TOTAL HOURS _____

This service was performed during the month of _____, 20_____.

Signature
Third Party Representative

Date Signed

COMMUNITY SERVICE EXEMPTION CERTIFICATION

I have received a copy of, have read and understand the contents of the BasileHousing Authority's Community Service Policy as required by HUD through the Quality Housing and Work Responsibility Act of 1998.

I certify that I am eligible for exemption from the Community Service requirement for the following reason.

- I am 62 years of age or older.
- I have a disability, which prevents me from working.
(Documentation to verify disability is required.)
- I am working every week.
(Employment verification form will serve as documentation.)
- I am participating in a Welfare to Work Program
(Must provide verification letter from agency.)
- I am receiving Welfare assistance and I am participating in a required economic self-sufficiency program or work activity.
(Must provide verification from the funding agency that you are complying with job training or work requirements.)
- I am a primary caregiver to a disabled person and am on the lease with said person.
- I am a full time student

ADULT FAMILY MEMBER

DATE

MEMORANDUM OF UNDERSTANDING BETWEEN

And
BASILE HOUSING AUTHORITY

PURPOSE: This Memorandum of Understanding entered into as of this _____ day of _____, 20____, by and between the Basile Housing Authority, hereinafter referred to as “PHA” and _____,

Hereinafter referred to as “Third Party”, sets forth the coordination interface between PHA and the Third Party for the purpose of providing alternative work service activities to participants in the Community Service Program as defined under Section 512 of the Quality Housing and Work Responsibility Act (QHWRA) effective October 1, 2000.

I. PURPOSE:

To establish a community work service process within the community in order to assist adult residents to participate in meeting their eight (8) hours per month of community service requirements.

II. OBJECTIVES:

- A. To develop procedures for working together to provide quality and timely opportunities for community service for the participating residents of the Basile Housing Authority.
- B. To create a directory of eligible opportunities from which residents can make selections.
- C. To provide participating residents the greatest possible selection choice of community service activities.
- D. To provide alternative work services as they become available to the participants.
- E. To have our participating residents volunteer and contribute eight (8) hours of community service each month.

III. ROLES AND RESPONSIBILITIES OF THE THIRD PARTY

To ensure that each community service participant is assigned work deemed appropriate by the Third Party. The Third Party will ensure that the Community Work Service Time Sheet is signed by a designated representative to record the hours of community service worked each time a resident participates. To designate appropriate local staff in the Third Party to serve as liaison for coordination of the participating residents in community service activities.

IV. ROLES AND RESPONSIBILITIES OF THE AUTHORITY

To ensure that only the adult residents as identified by Section 512 of the Quality Housing and Work Responsibility Act (QHWRA) are notified of all community work service opportunities available to them to meet their service work requirements. To monitor and track all hours worked by all participating residents for record keeping purposes for determining participant residents for record keeping purposes for determining participant compliance. The PHA will designate _____ to act as liaison person between the Third Party and PHA. The PHA will monitor and support ongoing lines of communication with residents to motivate and encourage participation in the work service program. To ensure the conditions under which the community service is to be performed are not hazardous to the participating residents.

V. CHANGES AND ASSURANCES

It is understood and agreed that the PHA and the Third Party shall not be liable in the event of accident, injury or death and shall be harmless from any litigation involving tort or other violation of local, state or federal laws. The Memorandum of Understanding may be altered, modified, or rescinded as necessary by the Authority Assistant Executive Director or the Executive Director. The Authority Executive Director and the Third Party Director will take appropriate actions within their respective agencies to ensure effective implementation of the terms identified herein.

VI. SIGNATURES

IN WITNESS WHEREOF, THIRD PARTY AND PHA, by their authorized agents have executed this Memorandum of Understanding as of the _____ day of _____, in the year 20_____.

Name

_____ Housing Authority

Name/Title

Name/Title

Date

Date

WITNESSES:

WITNESSES:

TO BE COMPLETED BY EVALUATORY/DIAGNOSTICIAN

This is to certify that, in my opinion, the applicant/tenant identified above meets the criteria checked below:

Disability Certification: as defined in Section 223 of the Social Security Act: an inability to engage in any substantial gainful activity because of any physical or mental impairment that is expected to result in death or has lasted or can be expected to last to continuously for at least 12 months; or, for a blind person at least 55 years old, inability because of blindness to engage in any substantial gainful activities comparable to those in which the person was previously engaged with some regularity and over a substantial period.

Based on the above definition, it is my opinion that the individual indicated above: is disabled is not disabled.

Accommodations required: _____

Handicapped Certification: Handicapped and whose physical impairment: is expected to be of long-continued and indefinite duration, substantially impedes his or her ability to live independently, and is of such disability could be improved by more suitable housing conditions.

Based on the above definition, it is my opinion that the individual indicated above: is handicapped is not handicapped.

Accommodations required: _____

Additional comments: (e.g., any special situations, etc.)

Disability/Handicapped Verification

I certify that the above Information is true and correct.

Evaluator/Diagnostician's

Name/Title

Signature

Date

Name of Organization

Address

City, State, Zip

Telephone Number

Warning: Section 1001 of Title 18 of the U.S. Code makes it a criminal offense to make willful false statements or misrepresentations to any Department or Agency of the United States as to any matter within its jurisdiction.

ATTACHEMNT H: PET POLICY

Basile Housing Authority

PET POLICY

In compliance with Section 526 of The Quality Housing and Work Responsibility Act of 1998, BHA residents shall be permitted to own and keep common household pets. Animals that are an auxiliary for persons with a disability are excluded from this policy. The ownership of common household pets is subject to the following rules and limitations:

1. Common household pets shall be defined as “domesticated animals such as a dog, cat, bird, rodent, fish or turtle”. Common household pets are defined as follows:

Bird	Includes Canary, Parakeet, Finch and other species that are normally kept caged; birds of prey are not permitted.								
Fish	In tanks or aquariums, not to exceed twenty (20) gallons in capacity; poisonous or dangerous fish are not permitted.								
Dogs	Dogs not to exceed twenty-five pounds (25 lbs.) weight, or fifteen (15) inches in height at full growth. Dogs must be spayed or neutered. Veterinarian’s recommended /suggested types of dogs are as follows: <table border="0" style="margin-left: 40px;"><tr><td>a. Chihuahua</td><td>e. Cocker Spaniel</td></tr><tr><td>b. Pekingese</td><td>f. Dachshund</td></tr><tr><td>c. Poodle</td><td>g. Terriers</td></tr><tr><td>d. Schnauzer</td><td></td></tr></table>	a. Chihuahua	e. Cocker Spaniel	b. Pekingese	f. Dachshund	c. Poodle	g. Terriers	d. Schnauzer	
a. Chihuahua	e. Cocker Spaniel								
b. Pekingese	f. Dachshund								
c. Poodle	g. Terriers								
d. Schnauzer									

THE FOLLOWING DOGS AND OTHER DOGS MIXED WITH THESE DOGS WILL NOT BE PERMITTED:

- Pit Bull
- German Shepard
- Chow
- Akita
- Rotweiler
- Great Dane
- Wolf Hybrid
- Doberman
- Attack-trained Dogs

- | | |
|-------------|---|
| Cats | Cats must be spayed or neutered and be de-clawed or have scratching post, and should not exceed fifteen pounds (15 lbs.). |
| Rodents | Rodents other than hamsters, gerbils, white rats or mice are not considered common household pets. These animals must be kept in appropriate cages. |
| Reptiles | Reptiles other than turtles or small lizards such as chameleons are not considered common household pets. |
| Exotic Pets | At no time will the BHA approve of exotic pets, such as snakes, monkeys, game pets, |

etc.

2. No more than one (1) dog or cat shall be permitted in a household. In the case of birds, a maximum of two birds may be permitted. There shall be no limit as to the number of fish, but no more than one aquarium with a maximum capacity of twenty (20) gallons shall be permitted. A Resident with a dog or cat may also have other categories of “common household pets” as defined above.
3. Pets other than a dog or cat shall be confined to an appropriate cage or container. Such a pet may be removed from its cage while inside the owner’s housing unit for the purpose of handling, but shall not generally be unrestrained.
4. Only one (1) dog or cat is allowed per household. NO PIT BULLS WILL BE PERMITTED OR OTHER DOGS LISTED ABOVE WILL BE PERMITTED. All dogs and cats will need to be on a leash, tied up, or otherwise restrained at all times when they are outside. Neither dogs nor cats shall be permitted to run loose.
5. Pet owners shall maintain their pet in such a manner as to prevent any damage to their unit, yard, or common areas of the community in which they live. The animal shall be maintained so as not to be a nuisance or a threat to the health or safety of neighbors, BHA employees, or the public, by reason of noise, unpleasant odors, or other objectionable situations.
6. Each pet owner shall be fully responsible for the care of the pet, including proper disposal of pet wastes in a safe and sanitary manner. Specific instructions for pet waste shall be available in the management office. Improper disposal of pet waste is a lease violation and may be grounds for termination.
7. All pets shall be inoculated and licensed in accordance with applicable state and local laws. All cats or dogs shall be neutered or spayed, unless a veterinarian certifies that the spaying or neutering would be inappropriate or unnecessary (because of health, age, etc.).
8. Visiting pets may be allowed as long as they generally conform to the guidelines expressed in this policy, except that, no additional pet deposit shall be required of the Resident with whom the pet is visiting unless the visit is in excess of seventy-two (72) hours, and two (2) verified complaints shall be grounds for excluding the pet from further visits.
9. All pets shall be registered with the Management Office immediately or no longer than ten (10) days following their introduction to the community. Registration shall consist of providing:
 - a. Basic information about the pet (type, age, description, name, etc.);
 - b. Proof of inoculation and licensing;
 - c. Proof of neutering or spaying. All female dogs over the age of six (6) months and female cats over the age of five (5) months must be spayed. All male dogs over the age of eight (8) months and all male cats over the age of ten (10) months must be neutered. If health problems prevent such spaying or neutering, a veterinarian’s certificate will be necessary to allow the pet to become or continue to be a Resident of the community;

Type of Pet	Pets Name	Inoculations (type and date)
License Date	Spay or Neuter Date	

ATTACHMENT I: ADMISSIONS POLICY
Admission And Continued Occupancy Policies

Prepared For The

BASILE HOUSING AUTHORITY

OF

BASILE, LOUISIANA

FALL 2007

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Introduction

The Basile Housing Authority (BHA) was established pursuant to the United States Housing Act of 1937, as amended, to provide decent, safe, sanitary and affordable housing to low income families. In accordance with this objective, the development of standard policies and procedures are necessary in order to ensure equitable treatment for all applicants and residents, as well as, to ensure the efficient operation of public housing units managed by the BHA. In recognition thereof the Basile Housing Authority has developed Policies on Admission and Continued Occupancy which implement federal and state regulations. Said policies are also based on recognition that the provision of decent, safe, sanitary and affordable housing is dependent upon social and economic factors as well as physical factors.

This Admission and Continued Occupancy Policy is intended to be consistent with the latest addition of the Code of Federal Regulations governing the Department of Housing and Urban Development, and all related HUD Transmittals and Notices, in the event of inconsistencies, the provisions of that code shall prevail.

The word BHA when used herein is intended to refer to the Basile Housing Authority.

The programs administered by the Authority are:

Federal:

- Family Low Income Public Housing

Authority

A1.0 Authority

Eligibility for admission to and occupancy of Low-Income Public Housing is governed by requirements of the Department of Housing and Urban Development, with some latitude for local policies and procedures. This Admissions and Continued Occupancy Policy (the Plan) incorporates these requirements and is binding upon applicants, residents, and the BHA alike, the latter two through inclusion of the Plan into the Dwelling Lease by reference. Notwithstanding the above, changes in applicable Federal Law or regulations shall supersede this policy at any point in which they are in conflict.

A1.1 Objectives

The Objectives of this policy are to:

- A. Promote the overall goal of safe, decent and sanitary housing in good neighborhoods by:
 - 1. Insuring a social and economic mix of low-income residents within each public housing neighborhood in order to foster social stability and upward mobility.
 - 2. Insuring the fiscal stability of the BHA.
 - 3. Lawfully denying admissions or continued occupancy to families whose presence in a public housing neighborhood is likely to adversely affect the health, safety or welfare of other residents or the physical environment of the neighborhood.
- B. Facilitate the efficient management of the BHA and compliance with Federal and State regulations by establishing the policy basis for management procedures, record keeping and auditing.
- C. Comply in letter and spirit with Title VI of the Civil Rights Act of 1964 and all other applicable Federal and State laws and regulations to insure that admission to and occupancy of public housing neighborhoods is conducted without regard to race, color, creed, age, sex, handicap, familial status or national origin.
- D. Prescribe standards and criteria for resident selection and annual re-examination of income and family composition.

Terminology - The term "He" or "She" used throughout this document is used in the generic sense to include male/female, singular/plural as appropriate. In addition, the term "the Plan" used throughout this document is used in the generic sense for Admission and Continued Occupancy Policies.

A1.2 Applicability

The provisions of the Plan are applicable to all BHA administered developments and/or programs receiving financial assistance from either the Federal and or State Governments. Applicants and residents will be treated with courtesy and consideration in all verbal and written communications.

A1.3 Sources of Standards

The pertinent laws of the Federal, State and Municipal Governments.

The Contractual agreements pertaining to the various developments and/or programs between the BHA, State and/or Federal agencies. The provision of Title 24, Sub-part B

(Section 960.201 thru 960.207), Sub-part D (Section 960.401 thru 960.409) and Sub-part A (Section 966.1 thru 966.6) as set fourth in the Code of Federal Regulations, Volume 40, Numbers 153, 154 and 188.

Policies established by the BHA's Board of Commissioners by formal resolution.

Directives issued by the BHA's administrative officers.

A1.4 Review of Plan

Annually the Executive Director or his/her designee shall review the operations of this plan and make changes as appropriate.

A1.5 Methods of Administration

The administration of the Plan is to provide each applicant the greatest opportunity to exercise his/her rights under this plan; to avoid any discrimination in any manner or provisions of any service against any applicant because of race, creed, religion, color, national origin, age, sex, handicap, familial status or source of income; and to promote integrated developments and/or programs.

The BHA will post, in a conspicuous place in the Administration office where applications are received, a notice that the facilities and services of the BHA are provided on a non-discriminatory basis.

A copy of this manual will be available to agencies, institutions, organizations and political subdivisions, which may refer applicants.

The BHA will instruct its staff concerning its and their obligations under the Civil Rights and Non-Discrimination laws and regulations of the Federal and State governments by conducting training, distributing copies of pertinent documents, and ongoing supervisory review.

All applicants and residents will be treated with courtesy and consideration at all times in all verbal and written communications.

No applicant, resident or staff will be intimidated nor will any retaliatory action be taken, nor threats thereof made, by BHA or its staff because of the applicant, resident or staff participation in Civil Rights activities or for having asserted any of his/her rights under the Civil Rights Acts, DOH, HUD's regulations and requirements pursuant thereto.

A1.6 Title VI Compliance

With the BHA's continuing efforts to provide voluntary compliance with Title VI, BHA is adhering to the following general provisions regarding its Public Housing Programs:

With respect to any housing accommodations, facilities, services, financial aid or other benefits involved in its federally funded public housing programs, the BHA, its officers, administrators, agents, employees, successors, all persons exercising governance over the BHA, and all persons in active concert or participation with any of them, agree to refrain from any acts which, on the grounds of race, color, creed, age, sex, handicap, familial status or national origin such as to:

1. Deny a person such benefits;
2. Provide benefits to a person which are different from those provided to others;

3. Subject a person to segregation or separate treatment in any matter related to such benefits;
4. Provide a preference for such benefits to any person, except as provided by this Agreement;
5. Restrict a person's access, in any way, to such benefits or enjoyment of any advantage or privilege enjoyed by others in connection with such benefits;
6. Treat a person differently from others in determining whether he/she satisfies any occupancy, admission, enrollment, eligibility, membership or other requirement or condition which the person must meet;
7. Deny a person an opportunity to participate in the program or activity through the use of biased preference criteria, or otherwise afford the person a different opportunity to participate from that afforded others.

A1.7 Equal Opportunity Requirements

The Basile Housing Authority hereby assures and certifies that it will comply with:

1. Title VI of the Civil Rights Act of 1964 (P.C. 88-352) and regulations pursuant thereto (Title 24CFR Part 1);
2. Title VIII of the Civil Rights Act of 1968 (P.L. 90-284) as amended, and administer its programs and activities relating to housing in a manner to affirmatively further fair housing;
3. Executive Order 11063 on Equal Opportunity in Housing and non-discrimination in the sale and rental of housing provided with Federal Financial Assistance;
4. Section 504 of the Rehabilitation Act of 1973, which prohibits discrimination based upon handicap in programs receiving Federal Financial Assistance;
5. The Age Discrimination Act of 1975, which prohibits discrimination based upon age in programs receiving Federal Assistance; and
6. Title II of the Americans with Disabilities Act, to the extent that it applies.

A1.8 Services For Non-English Speaking Applicants And Residents

The Basile Housing Authority will endeavor to have access to people who speak languages other than English in order to assist non-English speaking families. The following languages will be covered: Spanish

A1.9 Family Outreach

The Basile Housing Authority will publicize the availability and nature of the Public Housing Program for extremely low-income, very low and low-income families in a newspaper of general circulation, and by other suitable means.

To reach people who cannot or do not read the newspapers, the Basile Housing Authority will distribute fact sheets to community service personnel. The Basile Housing Authority will also try to utilize public service announcements.

The Basile Housing Authority will communicate the status of housing availability to other service providers in the community and inform them of housing eligibility factors and guidelines so they can make proper referrals for the Public Housing Program.

A1.10 Right To Privacy

All adult members of both applicant and resident households are required to sign HUD Form 9886, Authorization for Release of Information and Privacy Act Notice. The Authorization for Release of Information and Privacy Act Notice states how family information will be released and includes the Federal Privacy Act Statement.

Any request for applicant or resident information will not be released unless there is a signed release of information request from the applicant or resident.

A1.11 Required Postings

In each of its offices, the Housing Authority will post, in a conspicuous place and at a height easily read by all persons including persons with mobility disabilities, the following information:

- A. Statement of Policies and Procedures governing Admission and Continued Occupancy
- B. Notice of the status of the waiting list (opened or closed)
- C. Current Schedule of Routine Maintenance Charges
- D. Dwelling Lease
- E. Grievance Procedure
- F. Fair Housing Poster
- G. Any current Basile Housing Authority Notices

A1.12 Taking Applications

Families wishing to apply for the Public Housing Program will be required to complete an application for housing assistance. Applications will be accepted and may be made in person at: _____, _____ (City/Town), **LA** Applications will be accepted between the hours of **8:30 AM and 12 Noon and 1:00 and 4:00 PM, Monday thru Friday.**

Applications are taken to compile a waiting list. Due to the demand for housing in the Basile Housing Authority jurisdiction, the Housing Authority may take applications on an open enrollment basis, depending on the length of the waiting list.

Completed applications will be accepted for all applicants and the Housing Authority will verify the information. Applications will be mailed to interested families upon request. The completed application will be dated and time stamped upon its return to the Basile Housing Authority.

Persons with disabilities who require a reasonable accommodation in completing an application may call the Basile Housing Authority to make special arrangements.

The application process will involve two phases. The first phase is the initial application for housing assistance or the pre-application. The pre-application requires the family to provide limited basic information establishing any preferences to which they may be entitled. This first phase results in the family's placement on the waiting list.

Definitions

B1.0 Definitions

Adjusted Income

Adjusted income means annual income of the members of the family residing or intending to reside in the dwelling unit, after making the following deductions:

- (a) **Mandatory deductions.** In determining adjusted income, the responsible entity must deduct the following amounts from annual income:
 - (1) \$480 for each dependent;
 - (2) \$400 for any elderly family or disabled family;
 - (3) The sum of the following, to the extent the sum exceeds three percent of annual income:
 - (i) *Unreimbursed medical expenses of any elderly family or disabled family;*
and
 - (ii) Unreimbursed reasonable attendant care and auxiliary apparatus expenses for each member of the family who is a person with disabilities, to the extent necessary to enable any member of the family (including the member who is a person with disabilities) to be employed, but this allowance may not exceed the earned income received by family members who are 18 years of age or older who are able to work because of such attendant care or auxiliary apparatus;
and
 - (4) Any reasonable child care expenses necessary to enable a member of the family to be employed or to further his or her education.
- (b) **Permissive deductions—for public housing only.** For public housing only, a PHA may adopt additional deductions from annual income.

Annual Income

Annual Income is the anticipated total income from all sources received by the family head and spouse (even if temporarily absent) and by each additional member of the family, including all net income derived from assets, for the 12 month period following the effective date of initial determination or re-examination of income, exclusive of income that is temporary, non recurring, sporadic, and exclusive of certain other types of income specified in this policy.

Annual Income includes, but is not limited to:

The full amount, before any payroll deductions, of wages and salaries, overtime pay, commissions, fees, tips and bonuses, and other compensation for personal services;

The net income from operation of a business or profession. Expenditures for business expansion or amortization of capital indebtedness shall not be used as deductions in determining net income. An allowance for depreciation of assets used in a business or profession may be deducted, based on straight line depreciation, as provided in Internal Revenue Service regulations. Any withdrawal of cash or assets from the operation of a

business or profession will be included in income, except to the extent the withdrawal is reimbursement of cash or assets invested in the operation by the Family;

Interest, dividends, and other net income of any kind from real or personal property. Expenditures for amortization of capital indebtedness shall not be used as deductions in determining net income. An allowance for depreciation is permitted only as authorized in 2 above of this section. Any withdrawal of cash or assets from an investment will be included in income, except to the extent the withdrawal is a reimbursement of cash assets invested by the Family. Where the family has Net Family Assets in excess of \$5,000, Annual Income shall include the greater of actual income derived from all Net Family Assets or a percentage of the value of such Assets based on the current passbook savings rate, as determined by HUD;

The full amount of periodic payments received from social security, annuities, insurance policies, retirement funds, pensions, disability or death benefits and other similar types of periodic receipts, including the lump-sum payment for the delayed start of a periodic payment except from SSI and Social Security pay, per Notice PIH 93-11;

Payments in lieu of earnings, such as unemployment and disability compensation, worker's compensation and severance pay (but see "lump sum additions" in this policy);

Welfare assistance;

Scholarship payments specifically designated for room and board or a computed amount remaining after the expenses of books, tuition or travel;

Periodic and determinable allowances, such as alimony and child support payments, and regular contributions or gifts received from persons not residing in the dwelling; and/or

All regular pay, special pay and allowances of a member of the Armed Forces (whether or not living in the dwelling, but see paragraph 5 in the next sub-section regarding special pay).

Amounts received under a resident service stipend. A resident service stipend is a modest amount (not to exceed \$200 per month) received by a resident for performing a service for the PHA or owner, on a part-time basis, that enhances the quality of life in the development. Such services may include, but are not limited to, fire patrol, hall monitoring, lawn maintenance, resident initiatives coordination, and serving as a member of the PHA's governing board. No resident may receive more than one such stipend during the same period of time;

Annualization of income. If it is not feasible to anticipate a level of income over a 12-month period (e.g., seasonal or cyclic income), or the PHA believes that past income is the best available indicator of expected future income, the PHA may annualize the income anticipated for a shorter period, subject to a redetermination at the end of the shorter period.

Annual Income **does not include** such temporary, non-recurring or sporadic income as the following:

1. Temporary, non-recurring or sporadic income (including gifts);
2. Amounts that are specifically for or in reimbursement of the cost of medical expenses;

3. Lump-sum additions to family assets, such as inheritances, insurance payments (including payments under health and accident insurance and worker's compensation), capital gains, lump-sum payments of deferred periodic payments from SSI and Social Security and settlement for personal or property losses (but see "payments in lieu of earnings" in this policy);
 4. Amounts of educational scholarships paid directly to the student or the educational institution, and amounts paid by the Government to a veteran, for use in meeting the costs of tuition, fees, books, equipment, materials, supplies, transportation, and miscellaneous personal expenses of the student. Any amount of such scholarship or payment to a veteran not used for the above purposes that is available for subsistence is to be included in income;
 5. The special pay to a family member in the Armed Forces away from home and exposed to hostile fire;
 6. Amounts received under training programs funded by HUD;
 7. Amounts received by a disabled person that are disregarded for a limited time for purposes for Supplemental Security Income eligibility and benefits because they are set aside for use under a Plan to Attain Self-Sufficiency (PASS); or
 8. Amounts received by a participant in other publicly assisted programs which are specifically for or in reimbursement of out-of-pocket expenses incurred (special equipment, clothing, transportation, childcare, etc.) and which are made solely to allow participation in a specific program;
 9. Monies received for performing census data collection.
 10. Income from employment of children (including foster children) under the age of 18 years;
 11. Payments received for the care of foster children;
 12. Income of a Live-in Aide, as defined in 24 CFR 913.102;
- Any earned income tax credit refunds, per Notice PIH 91-10;

13. The following updated list of federally mandated exclusions supersedes that notice published on August 3, 1993. The following list of program benefits is the comprehensive list of benefits that currently qualify for the income exclusion stated in 24 CFR 5.609(c)(17) per the Federal Register publication on April 20, 2001:
 - i. *The value of the allotment provided to an eligible household under the Food Stamp Act of 1977 (7 U.S.C. - 2017(b));*
 - ii. Payments to Volunteers under the Domestic Volunteer Services Act of 1973 (42 U.S.C. 5044(g), 5058);
 - iii. *Payments received under the Alaska Native Claims Settlement Act (43 U.S.C. 1626(c));*
 - iv. *Income derived from certain submarginal land of the United States that is held in trust for certain Indian tribes (25 U.S.C. 459e);*

- v. *Payments or allowances made under the Department of Health and Human Services' Low-Income Home Energy Assistance Program (42 U.S.C. 8624(f));*
- vi. *Payments received under programs funded in whole or in part under the Job Training Partnership Act (29 U.S.C. 1552(b); (effective July 1, 2000, references to Job Training Partnership Act shall be deemed to refer to the corresponding provision of the Workforce Investment Act of 1998 (29 U.S.C. 2931);*
- vii. *Income derived from the disposition of funds to the Grand River Band of Ottawa Indians (Pub. L. 94-540, 90 Stat 2503-04);*
- viii. *The first \$2000 of per capita shares received from Judgment funds awarded by the Indian Claims Commission or the U.S. Claims Court, the interests of individual Indians in trust or restricted lands, including the first \$2000 per year of income received by individual Indians from funds derived from interests held in such trust or restricted lands (25 U.S.C. 1407-1408);*
- ix. *Amounts of scholarships funded under title IV of the Higher Education Act of 1965, including awards under Federal work-study program or under the Bureau of Indian Affairs student assistance programs (20 U.S.C. 1087uu);*
- x. *Payments received from programs funded under Title V of the Older Americans Act of 1985 (42 U.S.C. 3056(f));*
- xi. *Payments received on or after January 1, 1989, from the Agent Orange Settlement Fund or any other fund established pursuant to the settlement in *In Re Agent-product liability litigation. M.D.L. No. 381 (E.D.N.Y.);**
- xii. *Payments received under the Maine Indian Claims Settlement Act of 1980 (25 U.S.C. 1721);*
- xiii. *The value of any child care provided or arranged (or any amount received as payment for such care or reimbursement for costs incurred for such care) under the Child Care and Development Block Grant Act of 1990 (42 U.S.C. 9858q);*
- xiv. *Earned income tax credit (EITC) refund payments received on or after January 1, 1991 (26 U.S.C. 32(j));*
- xv. *Payments by the Indian Claims Commission to the Confederated Tribes and Bands of Yakima Indian Nation or the Apache Tribe of Mescalero Reservation (Pub. L. 95-433);*
- xvi. *Allowances, earnings and payments to AmeriCorps participants under the National and Community Service Act of 1990 (42 U.S.C. 12637(d));*
- xvii. *Any allowance paid under the provisions of 38 U.S.C. 1805 to a child suffering from spina bifida who is the child of a Vietnam veteran (38 U.S.C. 1805);*
- xviii. *Any amount of crime victim compensation (under the Victims of Crime Act) received through crime victim assistance (or payment or reimbursement of*

the cost of such assistance) as determined under the Victims of Crime Act because of the commission of a crime against the applicant under the Victims of Crime Act (42 U.S.C. 10602); and

- xix. Allowances, earnings and payments to individuals participating in programs under the Workforce Investment Act of 1998 (29 U.S.C. 2931).
- xx. Earned Income in excess of \$480 for each full-time student 18 years or older.
- xxi. Full amount of student financial assistance.

Adult

An adult is: 18 years of age or older, 18 years of age and married (not common law), or a person that has been relieved of the disability of non-age by juvenile court.

NOTE: *Only persons who are adults shall be eligible to enter into a lease agreement for occupancy.*

Appliances

Appliances are stoves and refrigerators.

Assets

The value of equity in real property, savings, stocks, bonds, checking and other forms of capital investment. The value of necessary items of personal property such as furniture and automobiles is not to be considered as an asset.

Child Care Expenses

Amounts anticipated to be paid by the family for the care of children under **13 years of age** during the period for which Annual Income is computed, but only where such care is necessary to enable a family member to be gainfully employed or to further his or her education and only to the extent such amounts are not reimbursed. The amount deducted shall reflect reasonable charges for child care, and, in the case of child care necessary to permit employment, the amount deducted shall not exceed the amount of income received from such employment. The BHA will not normally determine child care expenses necessary when the household contains an additional unemployed adult who is physically capable of caring for children.

Dependent

A member of the family household (excluding foster children) other than the family head or spouse, who is under 18 years of age or is a Person with Disabilities or Handicapped Person, or is a Full-Time Student. An unborn child shall not be considered a dependent.

Disabled Family

A family whose head or spouse or sole member is a person with disabilities. It may include two or more persons with disabilities living together, and one or more persons with disabilities living with (1) one or more persons who are determined to be essential to the care or well-being of the person or persons with disabilities.

Disabled Person

(See Person with disabilities)

Displaced Person

A person displaced by governmental action, or a person whose dwelling has been extensively damaged or destroyed as a result of a disaster declared or otherwise formally recognized under Federal Disaster Relief laws.

Elderly Family

A family whose head or spouse (or sole member) is an elderly person (a person who is at least 62 years of age). It may include two (2) or more elderly persons living together, with one (1) or more persons living in the unit who are determined to be essential to the care and well-being of the elderly person or persons.

Elderly Person

A person who is at least 62 years of age.

Emancipated Minor

Any juvenile who is 16 years of age or older and who has resided in the same county in the State for six (6) months next preceding the filing of the petition may petition the court in that country for a judicial decree of emancipation. A married juvenile is also emancipated by the same Article (1997, c.815,s.1.).

Eviction

The dispossession of the resident from the leased unit as a result of the termination of the lease prior to the end of the term, for serious or repeated violations of material terms of the lease or to fulfill the resident's obligations set forth in HUD regulations, Federal, State, or Local Law or for other good cause.

Extremely Low-Income Family

A family whose annual income does not exceed 30% of median income for the area, as determined by HUD, with adjustments for small and large families.

Familial Family

One or more individuals (who have not attained the age of 18 years) being domiciled with (having a permanent residence);

- A. A parent or another person having legal custody of such individual or individuals;
or
- B. The designee of such parent or other person having custody, with the written permission of such parent or other person; and includes any person who is pregnant or is in the process of securing legal custody of any individual who has not attained the age of 18 years.

Family

- A. Two or more persons related by blood, marriage or by operation of law, or two or more persons who are not so related but who will live together in a stable relationship and share resources. A family with or without children (the temporary absence of a child from the home in foster care shall not be considered in determining family composition and family size); who live regularly together as a single household in the dwelling unit. By definition, a family must contain a competent adult of at least 18 years of age or 18 years of age and married (not common law) to enter into a contract and capable of functioning as the head of household.
- B. An elderly family;
- C. A near-elderly family;
- D. A disabled family;
- E. A displaced family;
- F. The remaining member of a Resident family; and
- G. A single person who is not elderly or displaced person, or a person with disabilities, or the remaining member of a Resident family.

Note: Housing assistance limitation for single persons. A single person who is not an elderly or displaced person, or a person with disabilities, or the remaining member of a Resident family may not be provided (for Resident-based assistance) housing assistance for which the family unit size exceeds the one bedroom level (ref. 982.207 Housing assistance limitation for single persons, published in the Federal Register on 2/13/96).

The rule does not prohibit a single person from residing in a larger unit (2 or more bedrooms) with the amount of subsidy for a zero or one-bedroom family unit size.

Full-Time Student

A person who is carrying a subject load that is considered full-time for day students under the standards and practices of the educational institution offering a college degree, vocational education degree or certificate program.

Handicapped Assistance Expense

Reasonable expenses that are anticipated, during the period for which Annual Income is computed, for attendant care and auxiliary apparatus for a Handicapped or Disabled family member and that are necessary to enable a family member (including the Handicapped or Disabled member) to be employed, provided that the expenses are neither paid to a member of the family or reimbursed by an outside source.

Handicapped Person (See Person with disabilities)

Head of Household

Head of Household means the adult member of the family who is held primarily responsible and accountable for the family, particularly in regard to lease obligations.

Homeless Family

Any individual or family who:

1. Lacks a fixed, regular, and adequate nighttime residence; and
2. Has primary nighttime residence that is:
 - A. A supervised publicly or privately operated shelter designed to provide temporary living accommodations (including welfare hotels, congregate shelters, and transitional housing for the mentally ill);
 - B. An institution that provides a temporary residence for individuals intended to be institutionalized; or
 - C. A public or private place not designed for or ordinarily used as, a regular sleeping accommodation for human beings.

Income for Eligibility

“Income for Eligibility” for purposes of determining eligibility for statistical reporting, means “Annual Income.”

1. Developments available for occupancy before 10/01/81 - Income for eligibility shall not exceed the “Lower Income” limits.
2. Developments available for occupancy on or after 10/01/81 - Income for eligibility shall not exceed the “Very Low Income” limits.

Income for Rent

For the purpose of determining rents and for statistical reporting means adjusted income: except that Annual Income is to be used in determining the 10 percent minimum rent.

Live-In Aide

A person who resides with an Elderly, Disabled, or Handicapped person or persons and who:

1. Is determined by the BHA to be essential to the care and well-being of the person(s);
2. Is not obligated for support of the person(s); and
3. Would not be living in the unit except to provide supportive services.

Low Income Family

A family whose Annual Income does not exceed 80 percent of the median income for the area, as determined by HUD, with adjustments for smaller and larger families. HUD may establish income limits higher or lower than 80 percent of the median income for

the area on the basis of its finding that such variations are necessary because of the prevailing levels of construction costs of unusually high or low family incomes.

Medical Expenses

Medical expenses, including medical insurance premiums that are anticipated during the period for which Annual Income is computed, and that are not covered by insurance. Medical expenses, in excess of 3% of Annual Income, are deductible from annual income for elderly families and handicapped assistance expense as outlined.

Military Service

Military service means the active military service of the United States, which includes the Army, Navy, Air Force, Marine Corps, Coast Guard and since July 29, 1945, the commissioned corps of the United States Public Health Service.

Minor

A "minor" is a person less than eighteen years of age. (An unborn child may not be counted as a minor but is counted for eligibility of a single, pregnant female.)

Monthly Adjusted Income

One-twelfth of Adjusted Income.

Monthly Income

One-twelfth of Annual Income. For purposes of determining priorities based on an applicant's rent as a percentage of monthly income.

Near Elderly Family

A family whose head or spouse (or sole member) is at least 50 years of age but below the age of 62.

Neighborhood or Community

Any lower income Public Housing site as established in a development program, except that when sites are adjacent or within a block of each other, such sites collectively shall be considered one location.

Net Family Assets

Net cash value after deducting reasonable costs that would be incurred in disposing of real property, savings, stocks, bonds, and other forms of capital investments, excluding interests in Indian trust land and excluding equity accounts in HUD ownership programs. The value of necessary items of personal property such as furniture and automobiles shall be excluded. (In cases where a trust fund has been established and the trust is not revocable by, or under the control of, any member of the family or household, the value of the trust fund will not be considered as an asset so long as the fund continues to be held in trust. Any income distributed from the trust fund shall be counted when determining Annual Income.) In determining Net Family Assets, the BHA shall include the value of any assets disposed of by an applicant or resident for less than fair market value (including a disposition in trust, but not in a foreclosure or bankruptcy sale) during the two years preceding the date of application for the program or re-examination, as applicable, in excess of the consideration received therefore. In the case of a disposition as part of a separation or divorce settlement, the disposition will not be considered to be for less than fair market value if the applicant or resident received important consideration not measurable in dollar terms.

Person with Disabilities

1. Means a person who
 - a. Has a disability as defined in 42 U.S.C. 423;
 - b. Is determined, pursuant to HUD regulations, to have a physical, mental or emotional impairment that:
 - i. Is expected to be long-continued and of indefinite duration;
 - ii. Substantially impedes his or her ability to live independently, and
 - iii. Is of such a nature that such ability to live independently could be improved by more suitable housing conditions; or
 - c. Has a developmental disability as defined in 42 U.S.C. 6001.
2. Does not exclude persons having the disease of acquired immuno-deficiency syndrome or any conditions arising from the etiologic agent for acquired immuno-deficiency syndrome;
3. For purposes of qualifying for low-income housing, does not include a person whose disability is based solely on any drug or alcohol dependence; and
4. Means "individual with handicaps", as defined in §8.3 of this title in the Federal Register/Vol 65, No. 61/Wednesday, March 29, 2000/Rules and Regulations, for purposes of reasonable accommodation and program accessibility for persons with disabilities.

Public Housing Agency (PHA)

Any State, County, municipality or other government entity or public body (or agency or instrumentality thereof) that is authorized to engage in or assist in the development or operation of housing for lower income families.

Ranking Applicant Family

Is that eligible family within any particular rent range with the highest priority as defined in this policy, or priority being equal, the earliest date and time of application.

Ranking Rentable Unit

The "ranking rentable unit" is that rentable dwelling unit which is located in the neighborhood having the greatest number of the same bedroom size and type of rentable vacant units.

A "rentable unit" is a vacant unit which has been prepared for occupancy which is not encumbered by an offer which has been made but not yet been accepted or rejected.

Rent

For purposes of determining whether an applicant is entitled to a priority for public housing admission based on current rent as a percentage of monthly income, rent is defined as the actual amount due, calculated on a monthly basis, under a lease or rental agreement between a family and the family's current landlord, plus any monthly

payments that a family makes toward resident purchased utilities (except telephone). In calculating a family's payments toward utilities, the BHA will use its reasonable estimate of resident-purchased utilities and other housing services that are normally included in rent; or if the family chooses, the family's average monthly utility costs, based on the family's utility bills furnished by the family, for the most recent 12-month period, or, where bills are not obtainable for the entire period, for an appropriate recent period.

For the purposes of calculating rent under this paragraph, amounts paid to or on behalf of a family under any energy assistance program must be subtracted from the otherwise applicable rental amount to the extent that they are not included in the family's income.

Resident Rent

The amount payable monthly by the Family as rent to the Authority. Where all utilities (except telephone) and other essential housing services are supplied by the BHA, Resident Rent equals Total Tenant Payment. Where some or all utilities (except telephone) and other essential housing services are not supplied by the BHA and the cost thereof is not included in the amount paid as rent, Resident Rent equals Total Payment less the Utility Allowance. (Resident Rent is a term established and defined by 24 CFR [Part 913] and as such, is occasionally awkward in ordinary usage. For this reason, the term "Resident Rent" is used interchangeably with "rent" as defined elsewhere in the Plan to refer to the net monthly payment by the family to the BHA. The only exception is the term "rent" as defined in this policy in reference to admission priorities based on an applicant's rent as a percentage of monthly income).

Single Person

A person who lives alone or intends to live alone, and who does not qualify as an elderly family or displaced person or as the remaining member of a resident family.

Spouse

Spouse means the husband or wife of the head of household.

Standard Permanent Replacement Housing

For purposes of determining if a family is entitled to a priority for admission based on involuntary displacement, Standard Permanent Replacement Housing, is housing that is decent, safe and sanitary, is adequate for the family size, and the family is occupying pursuant to a lease or occupancy agreement, but does not include transient facilities such as motels, hotels or temporary shelters for victims of domestic violence or homeless families, and in the case of domestic violence referred to in the Section above, does not include the housing unit in which the applicant and the applicant's spouse or other member of the household who engages in such violence live.

Total Tenant Payment (TTP)

Total Tenant Payment for families whose initial lease are effective on or after August 1, 1982, shall be the higher of the following, rounded to the nearest dollar:

30 percent of Monthly Adjusted Income; or

10 percent of Monthly Income;

If the family receives Welfare Assistance from a public agency and a part of such payments, adjusted in accordance with the family's actual housing costs, is specifically designated by such agency to meet the family's housing costs, the monthly portion of such payments which is so designated. If the family's Welfare assistance is ratably reduced from the standard of need by applying a percentage, the amount calculated under this subsection shall be the amount resulting from one application of the percentage.

Total Tenant Payment does not include charges for excess utility consumption or other miscellaneous charges, such as maintenance charges, late charges, etc.

Utility

The provision of general electricity, gas, heating fuel, cooking fuel, water, sewage services and trash collection.

Utility Allowance

The cost of utilities (except telephone) for an assisted unit which are not provided by the landlord but are the responsibility of the family occupying the unit is called a utility allowance. This utility allowance is based upon building type and is determined by number of bedrooms and is equal to the estimate made by the BHA or HUD, of the monthly cost of a reasonable consumption of such utilities for the unit by an energy conservative household of modest circumstances consistent with the requirements of a safe, sanitary, and healthful living environment.

Utility Reimbursement

The amount, if any, by which the Utility Allowance for the unit, if applicable, exceeds the Total Tenant Payment for the family occupying the unit.

Very Low-income Family

A family whose annual income does not exceed 50 percent of the median income for the area, as determined by HUD, with adjustments for small and larger families. HUD may establish income limits higher or lower than 50 percent of the median income for the area on the basis of its finding that such variations are necessary because of unusually high or low family income.

Veteran

Any person who has served in the active military or naval services of the United States and shall have been discharged or released there from under conditions other than dishonorable.

Welfare Assistance

Welfare or other payments to families or individuals, based on need, that are made under programs funded, separately or jointly, by Federal, State or local governments.

Admission Process

C1.0 Application Taking

TheBHA maintains a waiting list for applicants interested in the various public housing programs. All admissions to public housing shall be made on the basis of a pre-application in such form as the BHA shall prescribe. The Application for Admission shall constitute the basic record of each family applying for admission. All supplemental materials pertaining to eligibility shall also be considered a part of the application record and carefully recorded. This includes verification of income and family composition and such other data as may be required. The BHA does not provide emergency housing and cannot modify the order of assignments otherwise prescribed because of emergency considerations.

The following conditions shall govern the taking and processing of applications:

TheBHA will not, on account of race, color, creed, religion, familial status, age, handicap, sex or national origin, deny or hinder any applicant family the opportunity to submit an application or lease a dwelling unit suitable to its needs in any of its developments.

TheBHA reserves the right to suspend taking applications for its waiting lists when the current supply of applicants exceeds the number of families which could be reasonably expected to be housed within the next eighteen (18) months.

1. All pre-applications must be made by a responsible adult member of the applicant family, who will reside in the household. He/She shall sign the pre-application and certify, subject to civil and criminal penalties, to the accuracy of all statements made therein. The BHA reserves the right to require the signature of any or all adult members of the applicant household.
2. The BHA will normally take applications from a central location, but reserves the right to establish satellite locations for application taking, so long as all processing is done in a central location.
3. The BHA reserves the right to establish times for taking applications, including by appointment. The BHA staff may at its discretion provide for application interviews outside of normal hours when necessary for hardship reasons.
4. Insofar as possible, application interviews shall be conducted in private.
5. In addition to income, family composition and information unique to each applicant, each application shall be hand dated upon time of receipt and the BHA's determination of an applicant's position will be based upon the date/time of receipt. All information regarding application and eligibility will be filed and as such, considered part of their permanent record. When the family is eligible, the application shall also record the correct unit size and type; the priority rating; the date, unit location and reason for rejection for any offer refused by the applicant.
6. Applications shall be updated as applicants report changes in income and family circumstances. All such communications from the applicant must be in writing and signed by the applicant. All modifications to applications shall be properly documented on hard copy and to the computer systems and the transaction initialed by the staff member making the change.
7. Every six (6) months, the BHA shall purge the application pool of applications no longer actively seeking housing. Normally, this shall be performed by removing

applicants from the waiting list who fail to respond to a “still interested” notice mailed to the last known address on the application. It shall be the sole responsibility of the applicant to inform the BHA in writing of changes in address or other family circumstances which might affect the status of the application.

8. The BHA shall maintain such records as are necessary to document the disposition of all applications to meet Department of Housing and Urban Development audit requirements as well as the regulations of Louisiana State agencies.
9. Applicants will have thirty (30) days to provide all necessary information as requested to document their application for eligibility. Failure to provide this information at the end of this period will result in the withdrawal of their application by the BHA.

C2.0 Admissions - Eligibility Criteria

1. All families who are admitted to Public Housing must be individually determined eligible under the terms of the policy. In order to be determined eligible, an applicant must meet **ALL** of the following requirements:
 - A. The applicant family must qualify as a family as defined in B1.0.
 - B. The applicant family's Annual Income as defined (HUD Secretary's definition) must not exceed income limits established by the Department of Housing and Urban Development for Public Housing in the County of this PHA's jurisdiction.
 - C. The applicant family must conform to the Occupancy Standards contained in policy C5.0 regarding unit size and type.
 - D. The applicant family must have a satisfactory record in meeting past financial obligations, especially in payment of rent.
 - E. The applicant family must have no record of disturbance of neighbors, destruction of property, unsafe living habits, unsanitary housekeeping practices, alcohol abuse, substance abuse, sexual deviation, includes a family member who is subject to a lifetime registration requirement under a state sex offender registration program or any other history which may be reasonably expected to adversely affect:
 - (1) The health, safety, or welfare of other residents;
 - (2) The peaceful enjoyment of the neighborhood by other residents; and/or
 - (3) The physical environment and fiscal stability of the neighborhood.
 - F. The applicant family must not have a record of grossly unsanitary or hazardous housekeeping per a check with current and/or previous landlord. This includes the creation of a fire hazard through acts such as the hoarding of rags and papers; severe damage to premises and equipment, if it is established that the family is responsible for the condition; seriously affecting neighbors by causing infestation, foul odors, depositing garbage improperly; or serious neglect of the premises. In a case where a qualified agency is working with the applicant family to improve its housekeeping and the agency reports the applicant family shows potential for improvement, decision as to eligibility shall be reached after referral to and recommendation by the Executive Director or his/her designee. This category does not include applicant families whose housekeeping is found to be superficially unclean or lacks orderliness, where such condition does not create a problem for the neighbors.
 - G. The applicant family must have no history of criminal activity which, if continued, could adversely affect the health, safety or welfare of other residents.
 - H. The applicant family must be able to demonstrate capacity to discharge all lease obligations. This determination shall be made on a case by case basis and shall not be used to exclude a particular group by age, handicap, etc. in determining the applicant family's capacity to discharge all lease obligations.

The BHA must consider the family's ability to secure outside assistance in meeting those obligations.

- I. If a prior resident of public housing or other housing programs administered by the BHA, the applicant family must have a satisfactory record in meeting financial and other lease obligations. A former resident who owes a move out balance to the BHA will not be considered for re-admission until the account is paid in full and reasonable assurance is obtained of the applicant's ability to meet his or her rent obligations. In addition, persons evicted from public housing, Indian housing, Section 23, or any Section 8 Housing Choice Voucher program because of drug-related criminal activity, are ineligible for admission to public housing for a three (3) year period beginning on the date of such eviction.
- J. The applicant family must have properly completed all application requirements, including verifications. Misrepresentation of income, family composition or any other information affecting eligibility, rent, unit size, neighborhood assignment, etc., will result in the family being declared ineligible. In the event the misrepresentation is discovered after admission, the family may be subsequently evicted, even if the family meets current eligibility criteria at that time.
 1. Sources of information for eligibility determination may include, but are not limited to, the applicant (by means of interviews or home visits), landlords, employers, family social workers, parole officers, court records, drug treatment centers, clinics, physicians or police departments where warranted by the particular circumstances. Information relative to the acceptance or rejection of an applicant shall be documented in accordance with section C3.0 and placed in the applicant's file. Such documentation may include reports of interviews, letters or written summaries of telephone conversations with reliable sources. At a minimum, such reports shall indicate the date, the source of information, including the name and title of the individual contacted, and a summary of the information received.
 2. In the event of the receipt of unfavorable information with respect to an applicant, consideration shall be given to the time, nature, and extent of the applicant's conduct or to factors which might indicate a reasonable probability of favorable future conduct or financial prospects. For example:
 - A. Evidence of rehabilitation;
 - B. Evidence of the applicant family's participation or willingness to participate in social services or other appropriate counseling service programs and the availability of such programs;
 - C. Evidence of the applicant family's willingness to attempt to increase family income and the availability of training or employment programs in the locality;
 - D. In the case of applicants whose capacity for independent living and discharges of lease obligations is in question, the resources

actually available in support of the family, such as visiting nurses, homemakers or live-in caretakers.

K. As a general rule applicants may be denied admission to Public Housing for the following time frames, which shall begin on the date of application, unless otherwise provided for herein below:

1. Denied admission for one (1) year for the following:

Past rental record

Bad rent paying habits

Bad housekeeping habits, in and outside the unit

Damages

Disturbances

Live-ins

2. Denied admission for three (3) years for the following:

Persons evicted from public housing, Indian Housing, Section 8, or Section 23 programs because of drug-related criminal activity are ineligible for admission to public housing for a three-year period beginning on the date of such eviction.

The BHA can waive this requirement if: the person demonstrates to the BHA's satisfaction successful completion of a rehabilitation program approved by the BHA, or the circumstances leading to the eviction no longer exist.

Demonstrates hostile behavior during the interview process that indicates that the applicant may be a threat to our residents.

3. Denied admission for five (5) years for the following:

Fraud (giving false information on the application is considered fraud).

An arrest or conviction record that indicates that the applicant may be a threat and/or negative influence on other residents. The five years shall begin on the date of the last reported act, completion of sentence and/or probation period.

Drug use without evidence of rehabilitation.

4. Denied admission for ten (10) years for the following:
Conviction for Drug Trafficking.
5. Denied admission for life to any household that includes any individual who is subject to a lifetime registration requirement under a state sex offender registration program.
6. Denied admission for life to any applicant who has been convicted of manufacturing or producing methamphetamine (commonly referred to as "speed") on the premises of the public housing project. Premises is defined as the building or complex in which the dwelling unit is located, including common areas and grounds.

However the BHA will permanently prohibit admission of any person convicted for the manufacture or production of methamphetamine on the premises of any federally assisted housing program.

C3.0 Verification of Income and Circumstances

No applicant family shall be admitted to public housing without thorough verification of income, family composition and all other factors pertaining to the applicant's eligibility, rent, unit size and type, priority rating, etc. The same types of verifications are required to process any interim or regular re-examination for public housing residents. Complete and accurate verification documentation shall be maintained for each applicant and resident. Such documentation may include, but is not limited to, the following:

1. Letters or other statements from employers and other pertinent sources giving authoritative information concerning all items and amounts of income and deduction, together with other eligibility and preference determinations.
2. Verification forms supplied by the Authority and returned properly completed by employers, public welfare agencies, etc.
3. Originals, photocopies, or carbon copies of documents in the applicant's possession which substantiates his/her statements, or a brief summary of pertinent contents of such documents signed and dated by the staff member who viewed them.
4. Statements from self-employed persons, and from persons whose earnings are irregular, such as salesmen, etc., sworn to before a Notary, setting forth gross receipts, itemized expenses and net income (expenses incurred for business expansion or amortization of capital indebtedness are to be included in net income).
5. Memoranda of verification data obtained by personal interview, home visit, telephone, or other means, with source, date received, name and title of person receiving the information clearly indicated, and a summary of information received.
6. Certified birth certificates, or other substantial proof of age, to support claims to the various entitlements in these policies for each member of the household.
7. Verification of evidence of citizenship and/or eligible immigration status or a citizen of the Republic of Marshall Islands, the Federated States of Micronesia, or the Republic of Palau. However people in the last category are not entitled to

housing assistance in preference to any United States citizen or national resident within Guam.

8. Social Security Card or legal documents verifying the Social Security number for the applicant and each member of the applicant's household who is at least six (6) years old. (If the applicant cannot provide the proper documentation requirements he/she must submit to the Authority the individual's SSN(s) and a certification executed by the individual that the SSN(s) submitted has been assigned to the individual, but that acceptable documentation to verify the SSN(s) cannot be provided).
9. Proof of disability, or of physical impairment, if necessary to determine the applicant's eligibility as a family or entitlement consideration under the criteria established in these policies, provided in written form by the appropriate government agency.
10. Statements from landlords, family social workers, parole officers, court records, drug treatment centers, clinics, physicians, or police departments, where warranted in individual cases.
11. Receipts for utility services.

12. In addition to such other verification as the BHA may require, verification that an applicant is living in substandard housing shall consist of a written statement or notice from a unit or agency of government or from an applicant's present landlord that the applicant's unit has one or more of the deficiencies listed in, or the unit's condition is as described in, the definition of Substandard Housing.

In the case of a homeless family, verification consists of certification, in a form prescribed by the Secretary of the Department of Housing and Urban Development or as developed by the BHA, of this status from a public or private facility that provides shelter for such individuals, or from the local police department or social services agency.

13. The BHA shall require the family head, head of household, members 18 years or older, or legally appointed designee to execute a HUD approved release and consent authorizing any depository or private source of income, or any Federal, State, or local agency to furnish or release to the BHA and to HUD such information as the BHA or HUD determines to be necessary.

Because eligibility for Federal housing assistance is not based on a "declaration system" but upon verification of actual income and family circumstances, the BHA is not limited to verification of data supplied by applicants or residents. Failure of an applicant to cooperate with the BHA in obtaining verifications will result in the application being declared incomplete and inactive. A resident who fails to cooperate or to release information may be evicted. In addition, interim rent reductions will not be made for residents until after receipt of all required verifications. In consideration of the privacy rights of residents and applicants, the BHA shall restrict its requests to those matters of income, family composition and other family circumstances which are related to eligibility, rent, unit size and type, admission priority rating, or other lawful determinations made by the BHA. If the verified data as listed in this policy are not more than one hundred and twenty (120) days old at the time an applicant is selected for admission, the data will be considered as reflecting the applicant's family's status at the time of admission.

(Refer to Appendix A for complete discussion of verification process).

C4.0 Determination and Notification of Eligibility

As soon as possible after receipt of an application, the BHA will determine the applicant family's eligibility for public housing in accordance with the provisions of C2.0 and send a letter signifying the status of the applicant. In the event an applicant family is determined to be eligible, it shall be informed of the time estimated before an offer of a dwelling unit will be made. If this period is estimated to be longer than one year, the applicant family shall be informed of this fact in addition to its place on the current waiting list. In the event an applicant family is determined to be ineligible, it shall also be informed in writing of the basis for this determination. An applicant family does not have the right to use the Resident Grievance Procedure, but will be given, upon request, the opportunity for an Informal Hearing to present such facts as it wishes. In circumstances when waiting lists are very long, thorough investigation of each application may not be practical until such application approaches selection. In such cases, apparently eligible applicant families will be notified of its eligibility determination is tentative in nature, being largely based on declarations made by the applicant family, and is subject to further reviews prior to admission. In all cases, the BHA reserves the right to withdraw any determination of eligibility, tentative or otherwise, when additional information indicates that the prior determination was inappropriate.

C4.1 Notification Procedure

Upon completion of the application, a prompt decision of initial eligibility or ineligibility will be made, and the appropriate notification mailed to the applicant.

Eligible Applicants

All applicants will be notified in writing of initial eligibility and the basis of that determination. The notification will include client number, application status, program and unit size.

A redetermination of eligibility and suitability will be undertaken prior to the offer of a dwelling unit.

Ineligible Applicants

All applicants will be notified in writing of initial ineligibility and the basis of that determination. The notification will include client number, application status, and reason for ineligibility.

Any applicant notified of his/her initial ineligibility will be afforded the right to resubmit information that may result in the applicant being redetermined initially eligible.

C5.0 Occupancy Standards

To avoid overcrowding and prevent wasted space, units are to be leased in accordance with the occupancy standards set forth below. If there should be a dwelling unit which cannot be filled with a family of appropriate size, after all possible efforts have been made to stimulate applications, a family eligible for the next smaller size unit may be offered this unit. This shall be with the understanding that the family is subject to later transfer to a unit of the proper size.

The head of household and co-resident are usually assigned a separate bedroom.

Family members are generally assigned to bedrooms on the basis of two of the same sex per bedroom or of opposite sex up to the age of six (6).

BHA may allow a child less than three (3) years of age to share a bedroom with a parent(s).

BHA will treat a single pregnant woman as a two-person family.

BHA, at its sole discretion, may assign a separate bedroom to any family member with a documented medical need.

The BHA will also assign units based on the type of unit needed by the individual applicant or applicant family. This refers to the family's ability to use stairs or their status as an elderly family.

Residents should not be assigned to bedroom sizes outside of the minimum and maximum constraints listed below and in addition, any “single person” shall not be assigned a unit with two or more bedrooms:

Number of Bedrooms	Number of Persons	
	Min	Max
0	1	1
1	1	2
2	2	4
3	3	6
4	4	8
5	5	10

These standards regarding the minimum and maximum number of persons who will occupy a unit will be applied within the restraints of financial solvency and program stability.

TheBHA reserves the right to over house in its conventional public housing programs in an effort to correct unacceptably high vacancy rates. An unacceptably high vacancy rate is when a development or the BHA wide vacancy rate is 2% or more. Families placed into larger than needed units will sign a waiver agreeing to be transferred to a smaller, but appropriate sized unit, should the larger unit be needed in the future by an applicant family or a Resident family.

When it is found that the size of the dwelling is no longer suitable for the family in accordance with these standards, the family will be required to move as soon as a dwelling of appropriate size becomes available. These families will be transferred in accordance with the Transfer Policy (E1.0).

C6.0 Income Targeting and Deconcentration

1. Objective:

The BHA shall make every effort possible to provide for deconcentration of poverty and income mixing in its communities by bringing higher income residents into lower income developments and lower income residents into higher income developments.

To this extent the BHA shall insure that not less than forty percent (40%) of all new admissions shall be families whose income at the time of their admission does not exceed thirty percent (30%) the area's median income.

The BHA does not intend to utilize and/or impose any specific income or racial quotas nor will the BHA offer incentives for eligible families to occupy units in developments predominately occupied by families having either lower or higher incomes.

2. BHA Deconcentration Policy:

It is the policy of the Basile Housing Authority (BHA) to house families in a manner that will prevent a concentration of poverty families and/or concentration of higher income families in any one development. The specific objective of the BHA is to house no less than 40% of its inventory with families that have income at or below 30% of the area median income by public housing development. Also the BHA will take actions to insure that no individual development has a concentration of higher income families in one or more of the developments. To insure that the BHA does not concentrate families with higher income levels, it is the goal of the BHA not to house more than 60% of its units in any one development with families whose income exceeds 30% of the area median income. The BHA will track the status of family income, by development, on a monthly basis by utilizing income reports generated by the BHA.

To accomplish the deconcentration goals the BHA will take the following actions:

- A. At the beginning of each fiscal year, the BHA will establish a goal for housing 40% of its new admissions with families whose incomes are at or below the area median income. The annual goal will be calculated by taking 40% of the total number of move-ins from the previous fiscal year.
- B. To accomplish the goals of:
 1. Housing not less than 40% of its inventory on an annual basis with families that have incomes at or below 30% of area median income, and
 2. Not housing families with incomes that exceed 30% of the area median income in developments that have 60% or more of the total household living the development with incomes that exceed 30% of the area median income, the BHA's Resident Selection and Assignment Plan, which is a part of this policy, provides for the utilization of local preferences with regards to applicant selection from its waiting list.

C7.0 Applicant Selection and Assignment Plan

C7.1 Application Ranking

Applications will be filed and selected in the following order:

1. By date and time of application.

C7.2 Applicant Assignment

Selection of applicant families for making offers of dwelling units shall be performed by matching the ranking unit to the applicant as follows:

1. The "ranking rentable unit" is that rentable dwelling unit which is located in the neighborhood having the greatest number of the same bedroom size and type of rentable vacant units.

A "rentable unit" is a vacant unit which has been prepared for re-occupancy, and which is not encumbered by an offer which has been made but not yet accepted or rejected.

2. The "ranking applicant family" is that eligible family with the earliest date and time of application.

C7.3 Dwelling Unit Offers

When the ranking applicant is matched to the specific ranking unit, that dwelling unit becomes "unrentable" until the offer made is accepted or rejected. In order to reduce vacancy loss, it is necessary that processing from this point move as quickly as possible. To that end, the following conditions shall apply to dwelling unit offers:

1. As an application nears the top of the waiting list, the BHA will contact the applicant family to determine continued interest, to update the application for final processing, to alert the applicant that an offer is likely in the near future, and to inform the applicant about requirements for move-in, such as utility company

verifications, security deposits, etc. For an applicant on a short waiting list, the steps enumerated above may be included in the process of taking the complete application.

2. Upon receipt of the initial offering, the applicant shall have three business days to accept or reject the housing unit. Failure to give an answer within the prescribed time period shall be counted as rejection of the offer. Failure to respond to an offer will result in a withdrawal of the offer and the applicant will be moved to the bottom of the waiting list with a new date and time indicated.

3. Upon acceptance of the offer, the applicant will then be assigned a deadline for move-in. Before the end of this period, the applicant must complete all outstanding pre-occupancy requirements, such as joint unit inspection, establishment of utility services, leasing interview, and lease execution. Normally, this deadline will be within three working days of acceptance of the offer, but may be extended a maximum of five additional days at the discretion of the Authority when necessary to alleviate hardship. Failure to complete move-in requirements within the assigned period will result in withdrawal of the offer and inactivation of the application.

The family will pay a security deposit at the time of lease signing. The security deposit equal to:

- | | | |
|----|--------------------------------|----------|
| A. | Regular Family Residents – All | \$200.00 |
| B. | Elderly and Disabled Residents | \$200.00 |

In the case of a move within public housing, the security deposit for the first unit will be transferred to the second unit. Additionally, if the security deposit for the second unit is greater than that for the first, the difference will be collected from the family. Conversely, if the security deposit is less, the difference will be refunded to the family. In the event there are costs attributable to the family for bringing the first unit into condition

4. The BHA only has a certain number of housing units modified for Handicapped Accessibility. When an accessible housing unit becomes available, before the unit is offered to a non-handicapped applicant, the BHA must first offer it to an existing resident having a handicap and occupying a non-accessible housing unit. If no such resident exists, the housing unit must be offered to an applicant on the waiting list having a handicap requiring those features. If the accessible unit must be offered to an applicant who does not (nor does any family member) have an impairment, the BHA may require the applicant to agree to move to a non-accessible unit when such a unit is available.

C7.4 Unit Refusals

When an applicant refuses an offer of a housing unit, the application shall be returned to the waiting list, being assigned (for processing purposes only) the lowest priority and an application date and time which correspond to the date of the refusal. Upon return to the top of the waiting list, such an applicant would be made an offer in accordance with the provisions of this policy. Upon refusal of the second such offer, including any in neighborhoods previously refused, the application shall be removed from the waiting list. There will be a three-month waiting period before the applicant will be allowed to re-apply for a unit.

If the applicant is willing to accept the unit offered but is unable to move at the time of the offer and presents clear evidence of his/her inability to move to the BHA's satisfaction, refusal of the offer shall not count as one of the number of allowable refusals permitted the applicant before placing his/her name at the bottom of the eligible applicant list, or placing the application in the inactive status.

If an applicant presents, to the satisfaction of the BHA, clear evidence that acceptance of a given offer of a suitable vacancy will result in undue hardship or handicap not related to considerations of race, color, creed, age, handicap, familial status or national origin, such as inaccessibility to source of employment, children's day care and the like, refusal of such an offer shall not be counted as one of the allowable refusals permitted

the applicant before placing his/her name at the bottom of the eligible list or placing the application in the inactive status.

C8.0 Leasing of Dwelling Units

The head of household of each family accepted as a resident is required to execute a lease agreement in such form as the BHA shall require prior to actual admission. All remaining adult members who are 18 years of age or older of the household are also required to sign the lease. One copy of the lease will be given to the lessee and the original will be filed as part of the permanent records established for the family in the BHA's Central Office and the remaining copy will go to the development office as part of the Resident's records.

Each lease shall specify the unit to be occupied, the date of admission, the size of the unit to be occupied, all family members who will live in the unit, the rent to be charged, the date rent is due and payable, other charges under the lease, and the terms of occupancy. It shall be explained in detail to the head of household or other responsible adult before execution of the lease.

The lease shall be kept current at all times. If a resident family transfers to a different unit in the same or another BHA community, the existing lease will be canceled. A new lease will be executed for the unit to which the family is to move by the head of household. If any other change in the resident's status results in the need to change or amend any provisions of the lease, or if the BHA desires to waive a provision with respect to the resident, (1) the existing lease is to be canceled and a new lease executed, or (2) an appropriate rider is to be prepared and executed and made a part of the existing lease.

Certain documents are made a part of the dwelling lease by reference. These include, but are not limited to, the Admission and Continued Occupancy Policy (the Plan), and the posted Resident Rules and Regulations.

Cancellation of a resident's lease is to be in accordance with the provisions of the lease. Generally, the lease shall not be canceled or not renewed except for serious or repeated violations of its terms by the resident. Written records shall be maintained containing the pertinent details of each eviction.

C9.0 Admission of Additional Members to A Current Household

1. Purpose - Population in excess of the number of persons for which a neighborhood or unit was designed is often the cause of many serious management problems including crime, vandalism, excessive maintenance costs, and low resident satisfaction. It is with this in mind that this section of the Plan is established. The purpose is not to establish an alternate means of Admissions.
2. Application Procedure - The resident of a household that wishes to add additional members with the exception of a new born child to their household must first submit a written application, in the form prescribed by management, for approval by the Executive Director or his/her designee.
3. Eligibility Criteria
 - A. All new member(s) must be determined eligible in accordance with Section C2.0 eligibility criteria.

- B. The unit in which new members are requesting admission shall not be overcrowded and shall be maintained in accordance with the Section C5.0, Occupancy Standards.
4. Application Denial - The BHA may deny the application for inclusion of additional family member for any of the following reasons:
- A. The dwelling unit would be overcrowded or would exceed the Occupancy Standards as outlined in Section C5.0.
 - B. Additional members are not related to resident by blood, family make-up, marriage or legal adoption.
 - C. Additional members are prior Residents with balances owed.
 - D. Additional members are prior Residents who have been evicted for criminal or illegal activities.
 - E. Additional members are registered sex offenders.
 - F. Other reasons as determined from time to time by the Executive Director.
5. Additional members which do not require approval of the BHA. The BHA shall not deny approval for any of the following:
- A. Newborn infants of members currently on the lease.
 - B. Minor children of members currently on the lease who were removed from their care by court action and are being returned.
6. Examples of situations where the addition of a family or household member is subject to screening are:
- a. Resident plans to be married and files a request to add the new spouse to the lease;
 - b. Resident is awarded custody of a child over the age which juvenile justice records are available;
 - c. Resident desires to add a new family member to the lease, employ a live-in aide, or take in foster child(ren).
 - d. A unit is occupied by a remaining family member (s) under age 18 (who is not an emancipated minor) and an adult, not part of the original household, requests permission to take over as the head of household.
7. Residents who fail to notify the BHA of additions to the household or who permit persons to join the household without undergoing screening are in violation of the lease. Such persons will be considered unauthorized occupants by BHA and the entire household will be subject to eviction.
8. Visitors may be permitted in a dwelling unit so long as the visitors have no previous history of behavior on BHA premises that would be a lease violation. Visits of less than three (3) days need not be reported or approved by the Manager. Visits of more than three (3) and less than ten (10) days are permitted

provided they are reported to the Manager within 72 hours and authorized by the Manager. Visits of more than fourteen (14) calendar days shall be authorized only by the Executive Director with advance documentation of extenuating circumstances. Visitors remaining beyond this period shall be considered trespassers and the head of household shall be guilty of a breach of the lease.

9. In accordance with the lease, roomers and lodgers shall not be permitted to occupy a dwelling unit, nor shall they be permitted to move in with family occupying a dwelling unit. Violation of this provision is grounds for termination of the lease.
10. Resident will not be given permission to allow former residents of BHA who has been evicted to occupy the unit for any period of time. Violation of this is grounds for termination of lease.
11. Family members over the age of 17 or emancipated minors who move from the dwelling unit to establish new households shall be removed from the lease. The resident has the responsibility to report the move-out within thirty (30) calendar days of its occurrence.

These individuals may not be re-admitted to the unit and must apply as a new applicant household for placement on the waiting list (subject to applicable income limits, preferences, resident selection, and screening requirements). Medical hardship or other extenuating circumstances shall be considered by BHA in making determinations under this paragraph.

C10.0 Rent Rules

BHA general rent calculation is 30% of a residents' gross income, with minor income adjustment or 10% of the family's monthly income or the welfare rent. However, the BHA in an effort to encourage self-sufficiency and quality of life improvement has expanded its rent rules to include the following:

1. Minimum Rent

BHA's minimum rent is \$ 50.00 excluding utilities.

There are exemptions from the payment of the minimum rent and those financial hardship circumstances are:

- The family has lost eligibility for, or is awaiting an eligibility determination for, a federal, state or local assistance program.
- The family would be evicted as a result of the imposition of the minimum rent requirements.
- The income of the family has decreased because of changed circumstances, including the loss of employment.
- A death in the family.
- Other situations as may be determined by the BHA.

In addition, if a resident requests a hardship exemption and the Authority determines the hardship to be of a "temporary nature", the exemption shall not be granted for 90 days. The resident cannot be evicted during this 90-day period for non-payment of rent. If the resident can demonstrate that the hardship is long-term, then the Authority must retroactively exempt the resident from the minimum rent for the initial 90 day period.

2. Market Value Flat Rents

- A. The flat rent is based on the market rent charged for comparable units in the private unassisted rental market. It is equal to the estimated rent for which the BHA could promptly lease the public housing unit after preparation for occupancy.

- B. *The BHA must use a reasonable method to determine the flat rent for a unit. To determine the flat rent, the BHA must consider:*
- i. The location, quality, size, unit type and age of the unit; and
 - ii. Any amenities, housing services, maintenance and utilities provided by the BHA.
- C. The flat rent is designed to encourage self-sufficiency and to avoid creating disincentives for continued residency by families who are attempting to become economically self-sufficient.
- D. If the family chooses to pay a flat rent, the BHA does not pay any utility reimbursement. The flat rent option may be exercised by the family at the time of lease-up or annual re-examination.
- E. The BHA must maintain records that document the method used to determine flat rents, and also show how flat rents are determined by the BHA in accordance with this method, and document flat rents offered to families under this method.

3. Choice of Rental Payment

A family shall have the opportunity annually at their re-exam to elect a market value flat rent or an income-based rent. The family can switch to an income-based rent during the year only with the permission of the BHA.

The BHA will provide the family with the opportunity to immediately switch to the income-based rent because of the following financial hardships:

- Income of the family has decreased because of a change in circumstances, loss or reduction of employment, death in the family which resulted in the reduction of or loss of income or other assistance.
- An increase in the family's expenses for medical costs, child care, transportation, education or similar items.
- Such other circumstances as may be determined by the Authority.

4. Earned Income Disregard

Any family whose income increases from new or greater employment will be disregarded for 12 months from the date of the income increase. The rent increase will then be phased in over a two-year period after the initial 12 months disregard and no more than a 50% increase can be applied to the rent calculation in either year. The disallowance of increased income for an individual family member is limited to a life-time 48 month period.

The earned income disregard applies to the following family members:

- A family member whose earned income increases during a family self-sufficiency or other job training program.

- A family member who, during the previous 6 months, was assisted under any State Temporary Assistance to Needy Families Program (TANF).
- A family member who becomes employed after being unemployed for at least one year.

5. Loss of Income from Welfare Work-Related Sanctions

If state or local public assistance benefits are decreased because of any failure of any member of the family to comply with the conditions under the assistance program requiring participation in an economic self-sufficiency program or imposing a work activities requirement, the resulting loss of income shall not be entitled to a rent reduction.

C11.0 Inspections

An authorized representative of the Housing Authority and an adult family member will inspect the premises prior to commencement of occupancy. A written statement of the condition of the premises will be made, all equipment will be provided, and the statement will be signed by both parties with a copy retained in the Housing Authority file and a copy given to the family member. An authorized Housing Authority representative will inspect the premises at the time the resident vacates and will furnish a statement of any charges to be made provided the resident turns in the proper notice under State law. The resident's security deposit can be used to offset against any resident damages to the unit.

C11.1 Move-In Inspections

The Housing Authority and an adult member of the family will inspect the unit prior to signing the lease. Both parties will sign a written statement of the condition of the unit. A copy of the signed inspection will be given to the family and the original will be placed in the resident file.

C11.2 Annual Inspections

The Housing Authority will inspect each public housing unit annually to ensure that each unit meets the Housing Authority's housing standards. Work orders will be submitted and completed to correct any deficiencies.

C11.3 Preventive Maintenance Inspections

This is generally conducted along with the annual inspection. This inspection is intended to keep items in good repair. It checks weatherization; checks the condition of the smoke detectors, water heaters, furnaces, automatic thermostats and water temperatures; checks for leaks and provide other minor servicing that extends the life of the unit and its equipment.

C11.4 Special Inspections

A special inspection may be scheduled to enable HUD or others to inspect a sample of the housing stock maintained by the Basile Housing Authority.

C11.5 Housekeeping Inspections

Generally, at the time of annual re-examination, or at other times as necessary, the Housing Authority will conduct a housekeeping inspection to ensure the family is maintaining the unit in a safe and sanitary condition.

C11.6 Notice Of Inspection

For inspections defined as annual inspections, preventive maintenance inspections, special inspections, and housekeeping inspections the Housing Authority will give the resident at least two (2) days written notice.

C11.7 Emergency Inspections

If any employee and/or agent of the Housing Authority has reason to believe that an emergency exists within the housing unit, the unit can be entered without notice. The person(s) that enters the unit will leave a written notice to the resident that indicates the date and time the unit was entered and the reason why it was necessary to enter the unit.

C11.8 Pre-Move-Out Inspections

When a resident gives notice that they intend to move, the Basile Housing Authority will offer to schedule a pre-move-out inspection with the family. The inspection allows the Housing Authority to help the family identify any problems which, if left uncorrected, could lead to vacate charges. This inspection is a courtesy to the family and has been found to be helpful both in reducing costs to the family and in enabling the Housing Authority to ready units more quickly for the future occupants.

C11.9 Move-Out Inspections

The Housing Authority conducts the move-out inspection after the resident vacates to assess the condition of the unit and determine responsibility for any needed repairs. When possible, the resident is notified of the inspection and is encouraged to be present. This inspection becomes the basis for any claims that may be assessed against the security deposit.

C12.0 Approval Process for Residents Requesting Permission to Operate a Business in the Unit

Prior to making a determination, the resident shall request the BHA's permission in writing and include in the request a complete outline of business activities and other data as may be requested by the BHA. When a resident desires to operate a legal profit making business from the leased unit, the BHA shall use the following factors in determining whether or not such activities are incidental to the primary use of the leased unit.

- A. Local building health codes, requirements for license or governmental approval.
- B. Local zoning ordinances.
- C. The effect on BHA insurance coverage.
- D. Utility consumption.
- E. Possible damage to the leased unit.
- F. Estimated traffic and parking.
- G. Disturbance of other residents.
- H. Attraction of non-residents to the neighborhoods.
- I. Possible use of resident business as a cover for drug-related activities.
- J. Rental Insurance with \$100,000 Liability Clause

In addition, the BHA shall take into consideration the many benefits to be found in small-scale in-home businesses such as; supplying necessary services to the developments; opportunities for individual economic and personal development; increased feeling of self-worth and a positive sense of community; and potential increased resident income.

C13.0 Occupancy by Police Officers

The BHA has elected to lease units to police officers in any development in which BHA management has determined that such occupancy will enhance security of said development and the residents that reside therein. Under the above circumstances the police officer would receive a local preference and a rent calculation for utilities only. This information is included in the BHA's annual plan.

Police Officer means a person employed on a full-time basis as a duly licensed professional police officer by a Federal, State or Local government or by an agency of these governments.

Continued Occupancy

D1.0 Eligibility for Continued Occupancy

Eligibility for continued occupancy in the BHA communities for only those residents:

1. Who qualify as a family as defined by Federal requirements and this policy (see definition in B1.0).
2. Who conform to the Occupancy Standard established for lower income housing, (see C5.0).
3. Whose past performance in meeting financial obligations, especially rent, and other charges, is satisfactory.
4. Whose family does not have a record of disturbance of neighbors, destruction of property, unsafe living habits, unsanitary housekeeping practices, substance abuse, sexual deviation, or any other history which may be reasonably expected to adversely affect:
 - A. The health, safety, or welfare of other residents.
 - B. The peaceful enjoyment of the neighborhood by other residents.
 - C. The physical environment and fiscal stability of the neighborhood.
5. Whose family does not have a record of grossly unsanitary or hazardous housekeeping. This includes the creation of fire hazards through acts such as the hoarding of rags and papers; severe damage to premises and equipment, if it is established that the family is responsible for the condition; seriously affecting neighbors by causing infestation, foul odors, depositing garbage improperly; or serious neglect of the premises. In cases where a qualified agency is working with the family to improve its housekeeping and the agency reports that the family shows potential for improvement, a decision as to the eligibility shall be reached after a referral with the Executive Director or his/her designee. This category does not include families whose housekeeping is found to be superficially unclean or lacks orderliness, where such conditions do not create a problem for the neighbors.
6. Who do not have a history of criminal activity which, if continued, could adversely affect the health, safety, or welfare of other residents.
7. Who continue to occupy the housing unit on a full time basis. Ownership or occupancy of another dwelling unit or failure to occupy the unit for a period greater than thirty (30) days shall be grounds for termination of the lease.
8. Who are, with the aide of assistance that is available to the family, physically and mentally able to care for themselves and their housing unit and to discharge all lease obligations. A person or persons remaining as a resident of a family may be permitted to remain in occupancy provided that the BHA, in its sole judgment, determines that the remaining person(s) is/are:
 - A. Otherwise eligible for continued occupancy;
 - B. Capable of carrying out all lease obligations including but not limited to rent payment, care of the housing unit, and proper conduct;

- C. Willing to assume all lease obligations of the prior leaseholder, including all payments under the lease; and/or
 - D. Legally competent to execute a lease in his/her own name. The BHA will not execute a lease with a minor.
9. Who have complied with the community work requirement of 8 hours of community service per month or participated in an economic self-sufficiency program for 8 hours per month.

Exemptions exist for any family member who is:

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

D2.0 Re-Examination

Re-examinations of income and family circumstances are conducted for the following purposes:

1. To comply with the Federal and State requirements relating to annual re-examinations.
2. To determine if each family remains eligible for continued occupancy under the terms of the lease and this policy.
3. To determine if the unit size and type is still appropriate to the family's needs and in compliance with the Occupancy Standards (C5.0).
4. To establish the Total Tenant Payment and the Resident Rent to be charged to the family (C10.0).
5. Interim re-examination shall be conducted within 30 days of a change in income or family composition. It is the family's responsibility to initiate the process.
6. Interim re-examination is required for the following: transfers; interim rent adjustments; changes in names of head of household or other adult members in the household; and in other special circumstances that affect family composition or income.

D2.1 Annual Re-Examinations

Annual re-examinations are necessary to comply with the Federal requirement that each family have its eligibility re-examined at least every twelve (12) months. Residents will be notified in writing of the requirements for re-examination in sufficient time to allow for the complete processing and verification of data. Failure to complete re-examination is a serious lease violation which will result in the termination of tenancy. Failure to complete re-examination includes:

1. Failure to appear for a scheduled re-certification interview without making prior alternative arrangements with the BHA.
2. Failure to supply or cooperate in the verification process pertaining to income, family composition and eligibility.
3. Refusal to properly execute required documents.

4. Non compliance for non-exempt members of a household with the community service requirement. However, the BHA will permit the noncompliant family to cure the noncompliance with a signed agreement to make up the hours needed during the next 12 month period. Continued noncompliance shall result in eviction of the entire family unless the noncompliant family member is no longer a part of the household.

D2.2 Special Re-Examinations

If at the time of admission, annual re-examination or interim re-examination, it is not possible to make an estimate of the Family Income with any reasonable degree of accuracy because:

1. Family member(s) are unemployed and there are not anticipated prospects of employment; or
2. The conditions of employment and/or income are so unstable as to invalidate usual and normal standards of determination.

Then a special re-examination will be scheduled on a date determined by the BHA's estimate of the time required for the family's circumstances to stabilize. If at the time of the scheduled special re-examination, it is still not possible to make a reasonable estimate of Family Income, special re-examinations will continue to be scheduled until such time as a reasonable estimate of Family Income can be made and the re-examination completed. The special re examinations are not to replace the annual re-examination (C10.0).

D2.3 Interim Re-Examinations

Interim re-examinations are performed to allow residents to comply with the dwelling lease requirements to report changes in income and family circumstances. The following are specific changes which must be reported in writing within thirty (30) days of their occurrence. No adjustment of rent either upward or downward is to be made except at the time of a regular or special re-examination unless:

1. There is a change in family composition. (Additions to the family, other than through birth of a child to a family member on the lease, must be approved by Management in advance as established in this policy);

2. There is a new source of family income. Changes in family income resulting from increases or periodic increases in government benefits do not have to be reported to on-site Management until annual re-examination, unless the amount of increase is equal to or greater than \$40 per month. However, a family who has had an income reduction between annual re-examinations must report all changes in income regardless of the amount or source within thirty (30) days of their occurrence;
3. A hardship occurs. (A hardship is interpreted to mean the occurrence of a situation which would warrant a reduction in rent based on the current definition in income and maximum rent-to-income ratio.) (C10.0); and/or
4. There is a need to correct an error. (The rent increase or decrease will be made as appropriate based on the circumstances.)

Rent increases shall be made effective the first day of the second month following the month in which the change actually **occurred**, after having given the resident a written thirty (30) day notice.

Rent decreases resulting from changes specified in items 1, 2, and 3 above shall be made effective the first day of the month following the month in which the change was **REPORTED** in writing, provided however that no decrease shall be made until proof of changes, as outlined above, has been furnished and deemed sufficient by Management. When rent is reduced between re-examinations, the resident must report all changes in income regardless of amount or source and rent shall be adjusted accordingly. It is the responsibility of the resident to report in writing all changes as outlined in items 1 and 2 within thirty (30) days of their occurrence.

D2.4 Processing Re-Examinations

All re-examinations - annuals, specials and interims - shall be processed under the following conditions:

1. All data must be verified and documented as required in C3.0. The BHA will NOT adjust rents downward until satisfactory verification is received.
2. Lease terminations resulting from re-examinations shall be conducted in accordance with the terms of the lease.
3. Families who are determined to be in an incorrect size or type of unit will be placed on the Transfer List in accordance with the Transfer Policy or be allowed to remain if over housed in accordance with the BHA's vacancy reduction policy.
4. All interim changes in resident's rent are to be made by a copy of "Notice of Rent Adjustment" which shall become a part of the lease. Changes in rent resulting from annual re-certifications shall be incorporated into the lease by a "Notice of Rent Adjustment".
5. Interim decreases in rent shall be effective on the first day of the month following the month in which the change was reported in writing and verification is completed to the satisfaction of the BHA.

6. Interim increases in rent are to be effective on the first day of the month following the month in which the change actually occurred. For employment, this is the date employment began, not the date income was first received. For government benefits, this date is the beginning of the period covered by the payment. The BHA shall give a thirty (30) day written notice of the increase, unless exempted under the Earned Income Disregard.
7. If it is found that a resident has misrepresented or failed to report facts upon which his/her rent is based so that he is paying less than he should be paying, the increase in rent shall be made retroactively to the date that the increase would have taken effect. The resident may be required to pay within seven (7) days of official notification by the BHA or be required to sign and abide by a repayment agreement, the difference between the rent he has paid and the amount he should have paid. In addition, the resident may be subject to civil and criminal penalties. Any misrepresentation is a serious lease violation which may result in termination of the lease.

D3.0 Re-Examination Dates

The re-examination date(s) is the effective date of rent changes resulting from the annual re-examination. The re-examination will commence sufficiently in advance to obtain signed Application for Continued Occupancy as may be appropriate and to process to completion.

D4.0 Temporary Rents

If, at the time of admission or re-examination, the BHA can satisfy itself that a family is of low income and within the approved income limits, but cannot make a determination of income for purposes of determining rent with a necessary degree of accuracy because of the inability to secure adequate verification or instability of income, a temporary rent may be established based on the data supplied by the applicant in the application. If a temporary rent is established, the resident will be notified of this action by a temporary rent notice or such other method determined to be legally and administratively sufficient and that his/her appropriate rent, when determined, will be effective retroactively to the date of re-examination. The resident will be required to pay any balance due or the BHA will credit his/her account with any overpayment which results from a temporary rent. The BHA will schedule special re-examination (see D2.2) of all factors relating to both rent and eligibility of each resident established on a temporary rent at intervals established by the BHA until a permanent determination can be made as to rent and eligibility status of the family.

D5.0 Eviction of Families for Drug-Related and/or Criminal Activities

BHA shall commence eviction proceedings of the resident family for:

1. Any drug-related criminal activity of the resident, household member or guest on or off the premises;
2. When BHA has determined that a pattern of illegal use of a drug interferes with the health, safety or right to peaceful enjoyment of the premises by other residents.
3. Any other criminal activity on or off the premises.
4. If the BHA determines that a household member is a fugitive felon or a paroled violator.
5. If the BHA determines that a household member's abuse or potential abuse of Alcohol threatens the health, safety or right to peaceful enjoyment of the premises by other residents.

The BHA has a "one strike" or "zero tolerance" policy with respect to violations of lease terms regarding drug-related and other criminal activities.

D5.1 Eviction of Families Whose Member(s) Do Not Comply With the Community Service Requirement

The BHA shall commence eviction proceedings of the resident family for non-compliance with the community service requirement of performing 8 hours of community service per month for an Annual requirement of 96 hours.

However, the family member may enter into a formal agreement to cure the deficiency by performing, in addition to the 8 hours per month in the forthcoming year, the hours deemed deficient. If at the end of the 2nd year the adult family member is not in compliance the BHA shall not renew the lease.

D5.2 Termination By The Housing Authority

The Basile Housing Authority will terminate the lease for serious or repeated violations of material lease terms. Such violations include but are not limited to the following:

- A. Nonpayment of rent or other charges;
- B. A history of late rental payments;
- C. Failure to provide timely and accurate information regarding family composition, income circumstances, or other information related to eligibility or rent;
- D. Failure to allow inspection of the unit;
- E. Failure to maintain the unit in a safe and sanitary manner;
- F. Assignment or subletting of the premises;
- G. Use of the premises for purposes other than as a dwelling unit (other than for housing authority approved resident businesses);
- H. Destruction of property;
- I. Acts of destruction, defacement, or removal of any part of the premises or failure to cause guests to refrain from such acts;
- J. Non-compliance with Non-Citizen Rule requirements;
- K. Permitting persons not on the lease to reside in the unit more than fourteen (14) days each year without the prior written approval of the Housing Authority; and
- L. Any other good cause.

The Housing Authority will take immediate action to evict any household that includes an individual who is subject to a lifetime registration requirement under a State sex offender registration program.

D5.3 Termination By Resident

The resident may terminate the lease at any time upon submitting a 14-day written notice. If the Resident vacates prior to the end of the 14 days, they will be responsible for rent through the end of the notice period or until the unit is re-rented, whichever occurs first.

D5.4 Abandonment

The Basile Housing Authority will consider a unit to be abandoned when a resident has both fallen behind in rent AND has clearly indicated by words or actions an intention not to continue living in the unit.

When a unit has been abandoned, a Housing Authority representative may enter the unit and remove any abandoned property. It will be stored in a reasonably secure place. A notice will be mailed to the resident stating where the property is being stored and when it will be sold. If the Housing Authority does not have a new address for the resident, the notice will be mailed to the unit address so it can be forwarded by the post office.

If the total value of the property is estimated at less than \$50.00, the Housing Authority will mail a notice of the sale or disposition to the resident and then wait 30 days. Family pictures, keepsakes, and personal papers cannot be sold or disposed of until 30 days after the Housing Authority mails the notice of abandonment.

If the estimated value of the property is more than \$50.00, the Basile Housing Authority will mail a notice of the sale or disposition to the resident and then wait 30 days before sale or disposition. Personal papers, family pictures, and keepsakes can be sold or disposed of at the same time as other property.

Any money raised by the sale of the property goes to cover money owed by the family to the Housing Authority such as back rent and the cost of storing and selling the goods. If there is any money left over and the family's forwarding address is known the Housing Authority will mail it to the family. If the family's address is not known, the Housing Authority will keep it for the resident for 6 months. If it is not claimed within that time, it belongs to the Housing Authority.

Within 30 days of learning of an abandonment, the Housing Authority will either return the deposit or provide a statement of why the deposit is being kept.

D5.5 Return Of Security Deposit

After a family moves out, the Basile Housing Authority will return the security deposit within 15 days or give the family a written statement of why all or part of the security deposit is being kept. The rental unit must be restored to the same conditions as when the family moved in, except for normal wear and tear. Deposits will not be used to cover normal wear and tear or damage that existed when the family moved in.

Transfers

E1.0 Transfer Policy

Objectives of the Transfer Policy:

- To fully utilize available housing resources while avoiding overcrowding by insuring that each family occupies the appropriate sized unit.
- To facilitate humane relocation when required for modernization or other management purposes.
- To facilitate relocation of families with complete and permanent inability to continue living in a multiple-story housing unit.
- To eliminate vacancy loss and other expenses due to unnecessary transfers.

E1.1 Types of Transfers

1. **BHA Initiated** - The BHA may at its discretion transfer residents because of an uninhabitable unit, major repairs, or other actions initiated by management as follows:
 - A. In the event of a fire, accident or natural disaster that results in the dwelling unit becoming uninhabitable, the resident will be offered alternative accommodations within the neighborhood if a rentable unit in the appropriate size is available. The option to transfer fire or disaster victims is open to the BHA; on-site management may review rent paying history, housekeeping, illegal or criminal activities and/or social dysfunction and use these criteria for making the determination to re-house. At BHA, the Executive Director has the ultimate responsibility for providing shelter for victims of fire. If the appropriate sized unit is not available within the same neighborhood, the family may be transferred to an appropriate size unit available at another BHA-owned neighborhood. If the move is to a site where residents purchase all or some utilities, the resident will pay the cost of any deposit required by the utility company. If an appropriate size unit is not available BHA-wide, then the family may be over-housed but placed on the transfer list with the transfer being accomplished at the appropriate time.

- B. If a neighborhood is undergoing modernization type work which necessitates vacating housing units, the affected residents will be relocated at the BHA's expense in available vacant units within the BHA.
 - C. To protect a family from reprisals because family members provided information on criminal activities to a law enforcement agency.
 - D. To protect a family whose member(s) have been the victim of a hate crime.
 - E. To accommodate a member of a family who has a mobility or other impairment that makes the person unable to use critical elements of the unit.
 - F. If there is involuntary disposition of the multi-family rental housing development by HUD under Section 203 of the Housing and Community Development Amendments of 1978.
 - G. If determined feasible by management, the BHA will attempt to relocate affected residents into vacant units within the site. Other decisions related to modernization transfers will be made by the Executive Director or his/her designee. The BHA may suspend normal transfer procedures to facilitate modernization type activities.
2. **Transfers for Approved Medical Reasons** - Residents may be transferred from their current housing unit in order to obtain reasonable accommodations of the needs of any resident with disabilities. The Authority may require medical documentation of a resident's condition from a physician or service provider and reserves the right to make its own evaluation of such documentation. Normally such transfers will be within the resident's original neighborhood unless the appropriate size, reasonable accommodations and type of unit do not exist on the site. All other medical related transfer requests shall be determined solely by the Executive Director or his/her designee.

A resident who desires to relocate on advice of a physician or service provider for reasons other than inability to negotiate stairs may file an application for a different housing unit with the management on site.

3. **Transfers to Appropriately Sized Unit**

If Resident's family composition **NO LONGER** conforms to Management's Occupancy Standards for the unit occupied, Management may require the Resident to move into a unit of appropriate size.

This section establishes both that the BHA has an obligation to transfer residents to the appropriately sized unit and that residents are obligated to accept such transfers. These will be made in accordance with the following principles:

- A. Determination of the correctly size housing unit shall be in accordance with the BHA's Occupancy Standards.
- B. Single persons, elderly and handicapped residents who occupy a one bedroom housing unit will not be required to relocate into an efficiency (0-BR).
- C. Transfers into the appropriately sized unit will be made within the same neighborhood unless that size unit is not available on the site.
- D. Management may, at it's discretion, separate a single household into multiple households if sufficiently large units are not available or if management and the family determine this to be in the interest of both the family and the neighborhood. Based on the selection criteria for new admissions, management shall determine that each smaller family unit is eligible by HUD definition and contains a leaseholder capable of discharging lease obligations. The new household must apply to the BHA for occupancy and be processed through the regular wait list procedures.

4. **Transfers for Non-handicapped families living in handicapped designated units.**

If the unit leased is a handicapped designated unit and the resident family occupying the unit is not a family with handicapped individuals, the resident agrees to transfer to a non-handicapped unit if and when the unit is needed for a handicapped family.

The BHA may from time to time have an excess of handicapped accessible units. In an effort to get the best use of all units the BHA may from time to time rent a handicapped designated unit to a family that has no handicapped members. The BHA will advise the family of the requirements to transfer if and when a handicapped designated family is determined eligible. If the family selected for the unit decides not to accept the unit because of the requirement to move at some date in the future, the refusal shall not count against the family.

This section establishes both that the BHA has an obligation to transfer non-handicapped residents residing in handicapped designated units to non-handicapped designated units and that non-handicapped families are obligated to accept such transfers. These will be made in accordance with the following principles:

- A. Transfers to a non-handicapped designated unit will be made within the same neighborhood unless that size unit is not available on the site.
- B. Transfers to a non-handicapped designated unit will be made outside of the same neighborhood if that size unit is not available on the site.
- C. Management, may at its discretion, separate a single household into multiple households if sufficiently large units are not available or if management and the family determine this to be in the interest of both the family and the neighborhood. Based on the selection criteria for new admissions, management shall determine that each smaller family unit is eligible by HUD definition and contain a legal leaseholder capable of discharging lease obligations. For the purposes of determining the priorities for transfers, this type of transfer shall be considered an BHA initiated transfer.

E1.2 Priorities for Transfers

All transfers must be either for approved medical reasons, for relocation to an appropriately sized unit or be initiated by the BHA. No other reasons for transfers will be considered. Within the eligible types, transfers shall be performed over new move-ins according to the following priorities:

1. BHA initiated transfers;
2. Transfers to a single-level housing unit for approved medical reasons;
3. Residents who are under-housed by one or more bedrooms as is consistent with HQS and Housing Code enforcement for the Town of Basile;
4. Residents who are over-housed by one or more bedrooms and not over-housed by the BHA to remedy the vacancy rate;

BHA initiated transfers always have priority over new move-ins. The remainder shall be mixed with new move-ins in a ratio of one transfer to five new move-ins. Within each priority type, transfers will be ranked by date. In transfers requested by residents for approved health reasons or to move to a larger housing unit, the date shall be that on which the changed family circumstances are verified by on-site management. In the case of an involuntary transfer, the date will be that on which management verifies that the change occurred. Management reserves the right to immediately transfer any family who has misrepresented family circumstances or composition.

E1.3 Transfer Procedures

The BHA staff shall:

- Determine whether a vacancy is used for a transfer or move-in based on priorities and established ratios.
- Coordinate actual transfers with other BHA staff.
- Maintain transfer logs and records for audit.
- Notify residents with pending transfers as their name approaches the top of the list.
- Counsel with residents experiencing problems with transfers, assisting hardship cases to find assistance.
- Issue final offer of vacant housing unit as soon as vacant housing unit is identified.
- Issue notice to transfer as soon as vacant housing unit is available for occupancy. This notice will give the resident four (4) working days to complete transfer.
- Process transfer documents.
- Participate in planning and implementation of special transfer systems for modernization and other similar programs.
- Inspect both housing units involved in the transfer, charging for any resident abuse.

Only one offer of a housing unit will be made to each resident being transferred within their own neighborhood. A resident being transferred outside his/her own neighborhood will be allowed to refuse one offer only. In the case of a family being transferred from a unit which is uninhabitable, incorrectly sized, or scheduled for major

repairs, failure to accept the unit offered, or the second unit offered in the case of a transfer outside the neighborhood, will be grounds for termination of the lease. When a person who has requested a single-level housing unit for approved medical reasons declines the offer of such a housing unit, the BHA is not obligated to make any subsequent offers. The BHA will notify the resident in such cases that the BHA has discharged its obligations to the resident, that he/she remains in the housing unit at his/her own risk, and that the BHA assumes no liability for his/her condition.

E1.4 Relocation Cost

The cost of the transfer generally will be borne by the family in the following circumstances:

- A. When the transfer is made at the request of the family or by others on behalf of the family.
- B. When the transfer is needed to move the family to an appropriately sized unit, either larger or smaller;
- C. When the transfer is necessitated because a family with disabilities needs the accessible unit into which the transferring family moved (The family without disabilities signed a statement to this effect prior to accepting the accessible unit); or
- D. When the transfer is needed because action or inaction by the family caused the unit to be unsafe or uninhabitable.

The cost of the transfer will be borne by the Housing Authority in the following circumstances:

- A. When the transfer is needed in order to carry out rehabilitation activities; or
- B. When action or inaction by the Basile Housing Authority has caused the unit to be unsafe or inhabitable.

The responsibility for moving costs in other circumstances will be determined on a case by case basis.

E1.5 Right of Management to Make Exceptions

The plan is to be used as a guide to ensure fair and impartial means of assigning units for transfer. It is not intended that this policy shall create a property right or any other type of right for a resident to transfer or refuse transfer. Management reserves the right to make exceptions to this policy as circumstances require, consistent with applicable regulations of the Department of Housing and Urban Development.

Fraud

F1.0 Fraud

TheBHA takes the position that:

“Any person who obtains or attempts to obtain or who establishes or attempts to establish eligibility for, and any person who knowingly or intentionally aids or abets such person in obtaining or attempting to obtain or in establishing or attempting to establish eligibility for any public housing or a reduction in public housing rental charges or any rent subsidy or payment from a resident in connection with public housing to which such person would not otherwise be entitled, by means of a false statement, failure to disclose information, impersonation, or other fraudulent scheme or device shall be guilty of a fraud.”

TheBHA considers the misrepresentation of income and family circumstances to be a serious lease and policy violation as well as a crime and will take appropriate action if apparent fraud is discovered.

Specifically:

1. An applicant family who has misrepresented income or family circumstances may be declared ineligible for housing assistance.
2. If any examination of the resident's file discloses that the resident made any misrepresentation (at the time of admission or any previous re-certification date) which resulted in his/her being classified as eligible when in fact he/she was ineligible, the resident may be required to vacate the housing unit even though he/she may currently be eligible.
3. A resident family who has made misrepresentation of income or family circumstances is subject to both eviction and being declared ineligible for future housing assistance.
4. If it is found that the resident's misrepresentations resulted in his/her paying a lower Resident Rent than he/she should have paid, he/she will be required to pay the difference between rent owed and the amount that should have been paid. This amount shall be paid whether or not the resident remains in occupancy, but failure to pay under terms established by the BHA shall always result in immediate termination of the lease. The BHA reserves the right to demand full payment within seven (7) days.
5. The BHA shall report apparent cases of resident or applicant fraud to the appropriate government agency. It shall be the policy of the BHA to press State and Federal authorities for prosecution of cases which, in the BHA's judgment, appear to constitute willful and deliberate misrepresentation.

Rent Collection Policy

G1.0 General Selection

Rent is due on or before the first (1st) day of each month and is delinquent after the fifth (5th) working day of the month. In addition, a \$5.00 late charge will be assessed to the resident. All payments received after 4:00 P.M. shall be dated the next work day, but for delinquency purposes they will have the actual payment date noted on the receipt. If rent is paid by a personal check and the check is returned for insufficient funds, this shall be considered a nonpayment of rent and will incur the late charge.

Excess utilities are due the fifteenth (15th) day after the notice of the charge.

Maintenance charges and all other charges are due the fifteenth (15th) day after notification of the charge (i.e. Work Order copy, letter, etc.). Maintenance charges and other charges, not otherwise mentioned in this policy, appearing on rental accounts are due the fifteenth (15th) day following written notification of the charge.

All payments received shall be applied to the oldest debt first, unless some charges are currently contested under a written grievance.

No amount shall be considered too small to issue an eviction warrant.

Management reserves the right to waive late charges or to accept payments after the delinquency date as determined on a case by case basis.

G1.1 Rental Payments After the Delinquency Date

- A. The BHA may assess a late charge to all residents, except those residents who have received a wavier, on the delinquency date.
- B. Payments tendered by residents after the delinquency date and prior to a demand notice will be accepted by management provided all rent and other charges then due are paid in full. No partial payments will be accepted after the delinquency date.
- C. No payments will be accepted after the expiration of the eviction notice unless the resident has made a written request for late payment and delay of court action. Such a request has been determined and approved for only those reasons which are genuine emergencies as determined by the BHA management, or upon completion of rent counseling.
- D. A resident will be allowed to tender rent and other charges then due in full after termination of the dwelling lease only twice within a twelve (12) month period (BHA fiscal year), and then only after completion of rent counseling.
- E. Failure to make payments when due and before expiration of the dwelling lease termination, shall result in an issuance of a dispossessionary warrant upon expiration of all legal notices.

G1.2 Procedures After the Expiration of the Termination of the Dwelling Lease

- A. Immediately after the expiration of the lease termination notice, management will issue a demand notice.
- B. No payments will be accepted after the demand notice is issued except from residents who have an approved request for late payment or complete rent

counseling as outlined in G1.1 (D), provided the rent counseling is completed prior to the issuance of a dispossessory warrant.

G1.3 Retroactive Rent Charges (Repayment Agreement)

Retroactive Rent Charges will be due and payable within seven (7) days of written notice unless arrangements are made prior to this day to make installment payments.

Normally retroactive rent installment payments must be computed not to exceed a three (3) month pay off. If the amounts are large and the resident will not be able to pay off the retro rent charge within three (3) months a repayment schedule may be established allowing a longer period, not to exceed twelve (12) months. Failure to comply with the repayment schedule may subject the Resident to eviction procedures.

G1.4 Vacated Residents With Balances

Vacated residents will have seven (7) days from the date of the statement of Refund of Security Deposit and Unearned Rent to pay the account or make arrangements for payment. Accounts will be reported to the Credit Bureau and collection action will be taken after the expiration of this time period.

Appendix

Appendix A
Verification Process

VERIFICATION

The Basile Housing Authority will verify information related to waiting list preferences, eligibility, admission, and level of benefits prior to admission. Periodically during occupancy, items related to eligibility and rent determination shall also be reviewed and verified. Income, assets, and expenses will be verified, as well as disability status, need for a live-in aide and other reasonable accommodations; full time student status of family members 18 years of age and older; Social Security numbers; and citizenship/eligible non-citizen status. Age and relationship will only be verified in those instances where needed to make a determination of level of assistance.

ACCEPTABLE METHODS OF VERIFICATION

Age relationship, U.S. citizenship, and Social Security numbers will generally be verified with documentation provided by the family. For citizenship, the family's certification will be accepted (Or for citizenship documentation such as listed below will be required.) Verification of these items will include photocopies of the Social Security cards and other documents presented by the family, the INS SAVE approval code, and forms signed by the family.

Other information will be verified by third party verification. This type of verification includes written documentation with forms sent directly to and received directly by a source not passed through the hands of the family. This verification may also be direct contact with the source, in person or by telephone. It may also be a report generated by a request from the Housing Authority or automatically by another government agency, i.e. the Social Security Administration. Verification forms and reports received will be contained in the applicant/resident file. Oral third party documentation will include the same information as if the documentation had been written, i.e. name date of contact, amount received, etc.

TYPES OF VERIFICATION

The chart below outlines the factors that may be verified and gives common examples of the verification that will be sought. To obtain written third party verification, the Basile Housing Authority will send a request form to the source along with a release form signed by the applicant/resident via first class mail.

VERIFICATION REQUIREMENTS FOR INDIVIDUAL ITEMS		
Item to Be Verified	3rd party verification	Hand-carried verification
GENERAL ELIGIBILITY ITEMS		
Social Security Number	Letter from Social Security, electronic reports	Social Security card
Citizenship	N/A	Signed certification, voter's registration card, birth certificate, etc.
Eligible immigration status	INS SAVE confirmation #	INS card
Disability	Letter from medical professional, SSI, etc	Proof of SSI or Social Security disability payments
Full time student status (if >18)	Letter from school	For high school students, any document evidencing enrollment
Need for a live-in aide	Letter from doctor or other professional knowledgeable of condition	N/A
Child care costs	Letter from care provider	Bills and receipts
Disability assistance expenses	Letters from suppliers, care givers, etc.	Bills and records of payment
Medical expenses	Letters from providers, prescription record from pharmacy, medical professional's letter stating assistance or a companion animal is needed	Bills, receipts, records of payment, dates of trips, mileage log
VALUE OF AND INCOME FROM ASSETS		
Savings, checking accounts	Letter from institution	Passbook, most current statements
CDS, bonds, etc	Letter from institution	Tax return, information brochure from institution, the CD, the bond worth

Item to Be Verified	3rd party verification	Hand-carried verification
Stocks	Letter from broker or holding company	Stock or most current statement, price in newspaper or through Internet
Real property	Letter from tax office, assessment, etc.	Property tax statement (for current value), assessment, records or income and expenses, tax return
Personal property	Assessment, bluebook, etc	Receipt for purchase, other evidence of worth
Cash value of life insurance policies	Letter from insurance company	Current statement
Assets disposed of for less than fair market value	N/A	Original receipt and receipt at disposition, other evidence of worth
INCOME		
Earned income	Letter from employer	Multiple pay stubs
Self-employed	N/A	Tax return from prior year, books of accounts
Regular gifts and contributions	Letter from source, letter from organization receiving gift (i.e., if grandmother pays day care provider, the day care provider could so state)	Bank deposits, other similar evidence
Alimony/child support	Court order, letter from source, letter from Human Services	Record of deposits, divorce decree
Periodic payments (i.e., social security, welfare, pensions, workers compensation, unemployment)	Letter or electronic reports from the source	Award letter, letter announcing change in amount of future payments

The family's assistance will not be denied, delayed, reduced, or terminated because of a delay in the process of determining eligible status under this section, except to the extent that the delay is caused by the family.

If the Housing Authority determines that a family member has knowingly permitted an ineligible noncitizen (other than any ineligible noncitizens listed on the lease) to permanently reside in their public housing unit, the family will be evicted. Such family will not be eligible to be readmitted to public housing for a period of 24 months from the date of eviction or termination.

VERIFICATION OF SOCIAL SECURITY NUMBERS

Prior to admission, each family member who has a Social Security number and who is at least 6 years of age must provide verification of their Social Security number. New family members at least 6 years of age must provide this verification prior to being added to the lease. Children in assisted households must provide this verification at the first regular reexamination after turning six.

The best verification of the Social Security number is the original Social Security card. If the card is not available, the Housing Authority will accept letters from the Social Security Agency that establishes and states the number. Documentation from other governmental agencies will also be accepted that establishes and states the number. Driver's licenses, military IDs, passports, or other official documents that establish and state the number are also acceptable.

If an individual states that they do not have a Social Security number, they will be required to sign a statement to this effect.

If a member of an applicant family indicates they have a Social Security number, but cannot readily verify it, the family cannot be housed until verification is provided.

If a member of a resident family indicates they have a Social Security number, but cannot readily verify it, they shall be asked to certify to this fact and shall have up to sixty (60) days to provide the verification.

If the individual is at least 62 years of age, they will be given one hundred and twenty (120) days to provide the verification.

If the individual fails to provide the verification within the time allowed, the family will be evicted.

TIMING OF VERIFICATION

Verification information must be dated within ninety (90) days of certification or reexamination. If the verification is older than this, the source will be contacted and asked to provide information regarding any changes.

When an interim reexamination is conducted, the Housing Authority will verify and update all information related to family circumstances and level of assistance. (Or, the Housing Authority will only verify and update those elements reported to have changed.)

FREQUENCY OF OBTAINING VERIFICATION

For each family member, citizenship/eligible noncitizen status will be verified only once. This verification will be obtained prior to admission. If the status of any family member was not determined prior to admission, verification of their status will be obtained at the next regular reexamination. Prior to a new member joining the family, their citizenship/eligible noncitizen status will be verified.

For each family member age 6 and above, verification of Social Security number will be obtained only once. This verification will be accomplished prior to admission. When a family member who did not have a Social Security number at admission receives a

Social Security number, that number will be verified at the next regular reexamination. Likewise, when a child turns six, their verification will be obtained at the next regular reexamination.

BASILE HOUSING AUTHORITY

STATEMENT ON VIOLENCE AGAINST WOMEN ACT

GOALS OF THE BASILE HOUSING AUTHORITY

The goals/objectives of the Basile Housing Authority are:

- To encourage prevention of all forms of violence against women who are residents and/or who are employees of the housing authority. and
- To support or assist victims (residents and employees) of violence including domestic violence, dating violence, sexual assault, or stalking.

DOMESTIC VIOLENCE

The Office on Violence Against Women (OVW) helps women who are victims of domestic violence. Like the OVW, the goals of the Basile Housing Authority are to encourage prevention and facilitate a greater public dialogue.

SEXUAL ASSAULT

According to the VAWA, sexual assault can be defined as any type of sexual contact or behavior that occurs without the explicit consent of the recipient. Falling under the definition of sexual assault is sexual activity such as forced sexual intercourse, sodomy, child molestation, incest, fondling, and attempted rape. Some more specific examples of sexual assault include:

- Unwanted vaginal, anal, or oral penetration with any object
- Forcing an individual to perform or receive oral sex
- Forcing an individual to masturbate, or to masturbate someone else
- Forcing an individual to look at sexually explicit material or forcing an individual to pose for sexually explicit pictures
- Touching, fondling, kissing, and any other unwanted sexual contact with an individual's body
- Exposure and/or flashing of sexual body parts

In general, state law assumes that a person does not consent to sexual activity if he or she is forced, threatened, unconscious, drugged, a minor, developmentally disabled, chronically mentally ill, or believe they are undergoing a medical procedure.

Perpetrators of sexual assault can be strangers, friends, acquaintances, or family members. Often, perpetrators commit sexual assault by way of violence, threats, coercion, manipulation, pressure, or tricks. In extreme cases, sexual assault may involve the use of force which may include, but is not limited to:

- Physical violence
- Use or display of a weapon
- Immobilization of victim

More often, however, sexual assault involves psychological coercion and taking advantage of an individual who is incapacitated or under duress and, therefore, is incapable of making a decision on his or her own.

Source: Rape, Abuse, and Incest National Network (RAINN)

STALKING

According to the Louisiana Revised Statutes § 14:40.2 Stalking as amended 2005, Stalking is the intentional and repeated following or harassing of another person that would cause a reasonable person to feel alarmed or to suffer emotional distress. Stalking shall include but not be limited to the intentional and repeated uninvited presence of the perpetrator at another person's home, workplace, school, or any place which would cause a reasonable person to be alarmed, or to suffer emotional distress as a result of verbal or behaviorally implied threats of death, bodily injury, sexual assault, kidnapping, or any other statutory criminal act to himself or any member of his family or any person with whom he is acquainted.

According to Louisiana Revised Statutes § 14:40.3 Cyberstalking. 2001, cyberstalking is the action of any person to accomplish any of the following:

- (1) Use in electronic mail or electronic communication of any words or language threatening to inflict bodily harm to any person or to such person's child, sibling, spouse, or dependent, or physical injury to the property of any person, or for the purpose of extorting money or other things of value from any person.
- (2) Electronically mail or electronically communicate to another repeatedly, whether or not conversation ensues, for the purpose of threatening, terrifying, or harassing any person.
- (3) Electronically mail or electronically communicate to another and to knowingly make any false statement concerning death, injury, illness, disfigurement, indecent conduct, or criminal conduct of the person electronically mailed or of any member of the person's family or household with the intent to threaten, terrify, or harass.

- (4) Knowingly permit an electronic communication device under the person's control to be used for the taking of an action in Paragraph (1), (2), or (3) of this Subsection.

PROGRAMS OF THE HOUSING AUTHORITY

In order to inform residents of the Housing Authority of their rights and assistance available to them for violence against women, the Housing Authority will do the following:

- Provide women are victims of violence with names, phone numbers, and/or website addresses of agencies that can provide assistance,
- Recognize [National Domestic Violence Awareness Month](#)
- Maintain poster in office during VAWA month,
- Have available for women copies of the Louisiana Revised Statute of 2005 addressing forms of violence against women,
- Post in front office the names, phone numbers, and/or website addresses of agencies that can provide assistance; and
- Make available Internet service to women who were or may be victims of violence to learn more about violence against women and to be able to contact agencies for advice or assistance via the Internet.

ASSISTANCE RESOURCES

National Center for Victims of Crime, Stalking Resource Center
For Victim Assistance:

Call 1-800-FYI-CALL, M-F 8:30 AM - 8:30 PM EST, or
E-mail gethelp@ncvc.org .

Office of Violence Against Women, U. S. Department of Justice

Call: 1-800-799-SAFE
TTY: 1-800-787-3224
E-mail: www.enditnow.gov

Rape, Abuse, and Incest National Network

Call: 1-800-656-HOPE (1-800-656-4673)

Louisiana Coalition Against Domestic Violence

P.O. Box 77308

Baton Rouge, LA 70879

(225) 752-1296 Fax: (225) 751-8927

Website: www.lcadv.org

Evangeline Parish Sheriff's Office

Call: 337-363-2191

Operating Budget

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

OMB Approval No. 2577-0026 (exp. 9/30/2006)

See page four for Instructions and the Public reporting burden statement

a. Type of Submission [X] Original [] Revision No. :		b. Fiscal Year Ending DECEMBER 31, 200	c. No. of months [X] 12 mo.	d. Type of HUD assisted project(s)	
e. Name of Public Housing Agency/Indian Housing Authority (PHA/IHA) HOUSING AUTHORITY OF THE TOWN OF BASILE				1	<input checked="" type="checkbox"/> PHA/IHA-Owned Rental Housing
f. Address (city, State, zip code)				2	<input type="checkbox"/> IHA Owned Mutual Help Homeownership
g. ACC Number FW340				3	<input type="checkbox"/> PHA/IHA Leased Rental Housing
h. PAS/LOCCS Project No. LA05800108D				4	<input type="checkbox"/> PHA/IHA Owned Turnkey III Homeownership
i. HUD Field Office				5	<input type="checkbox"/> PHA/IHA Leased Homeownership

j. No. of Dwelling Units 22	k. No. of Unit Months Available 264	m. No. of Projects
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Line No.	Acct. No.	Description (1)	Actuals Last Fiscal Yr. 2006 PUM (2)	<input checked="" type="checkbox"/> Estimates <input type="checkbox"/> or Actual Current Budget Yr. 2007 PUM (3)	Requested Budget Estimates			
					PHA/IHA Estimates		HUD Modifications	
					PUM (4)	Amount (To Nearest \$10) (5)	PUM (6)	Amount (To Nearest \$10) (7)
Homebuyers Monthly Payments for:								
010	7710	Operating Expenses						
020	7712	Earned Home Payments Account						
030	7714	Nonroutine Maintenance Reserves						
040	Total	Break-Even Amount (sum of lines 010, 020, and 030)						
050	7716	Excess (or Deficit) in Break-Even Amount						
060	7790	Homebuyers Monthly Payments (Contra)						
Operating Receipts								
070	3110	Dwelling Rentals	\$145.85	\$179.46	\$185.36	\$47,270		
080	3120	Excess Utilities	\$0.00	\$0.00	\$0.00	\$0		
090	3190	Nondwelling Rentals	\$0.00	\$0.00	\$0.00	\$0		
100	Total	Rental Income (sum of lines 070, 080, and 090)	\$145.85	\$179.46	\$185.36	\$47,270		
110	3610	Interest on General Fund Investments	\$0.63	\$0.80	\$0.79	\$210		
120	3690	Other Operating Receipts	\$9.98	\$4.02	\$4.02	\$1,060		
130	Total	Operating Income (sum of lines 100, 110, and 120)	\$156.46	\$184.28	\$190.17	\$48,540		
Operating Expenditures - Administration:								
140	4110	Administrative Salaries	\$52.00	\$55.87	\$56.74	\$14,980		
150	4130	Legal Expense	\$0.00	\$0.00	\$0.00	\$0		
160	4140	Staff Training	\$0.00	\$1.25	\$1.14	\$300		
170	4150	Travel	\$5.50	\$7.58	\$8.33	\$2,200		
180	4170	Accounting Fees	\$15.98	\$23.48	\$26.52	\$7,000		
190	4171	Auditing Fees	\$0.00	\$0.00	\$15.15	\$4,000		
200	4190	Other Administrative Expenses	\$17.93	\$27.73	\$32.01	\$8,450		
210	Total	Administrative Expense (sum of line 140 thru 200)	\$91.41	\$115.91	\$139.89	\$36,930		
Tenant Services:								
220	4210	Salaries	\$0.00	\$0.00	\$0.00	\$0		
230	4220	Recreation, Publications and Other Services	\$0.00	\$0.00	\$0.00	\$0		
240	4230	Contract Costs, Training and Other	\$0.00	\$0.00	\$0.00	\$0		
250	Total	Tenant Services Expense (sum of lines 220, 230, 240)	\$0.00	\$0.00	\$0.00	\$0		
Utilities:								
260	4310	Water	\$2.73	\$2.66	\$2.84	\$750		
270	4320	Electricity	\$9.16	\$8.95	\$8.60	\$2,270		
280	4330	Gas	\$54.93	\$57.58	\$53.18	\$14,040		
290	4340	Fuel	\$0.00	\$0.00	\$0.00	\$0		
300	4350	Labor	\$0.00	\$0.00	\$0.00	\$0		
310	4390	Other utilities expense	\$0.00	\$0.00	\$0.00	\$0		
320	Total	Utilities Expense (sum of line 260 thru line 310)	\$66.82	\$69.19	\$64.62	\$17,060		

Name of PHA / IHA

HOUSING AUTHORITY OF THE TOWN OF BASILE

Fiscal Year Ending

DECEMBER 31, 2008

Line No.	Acct. No.	Description (1)	Actuals Last Fiscal Yr. 2006 PUM (2)	<input checked="" type="checkbox"/> Estimates <input type="checkbox"/> or Actual Current Budget Yr. 2007 PUM (3)	Requested Budget Estimates			
					PHA/IHA Estimates		HUD Modifications	
					PUM (4)	Amount (To Nearest \$10) (5)	PUM (6)	Amount (To Nearest \$10) (7)
Ordinary Maintenance and Operation:								
330	4410	Labor	\$0.00	\$0.00	\$0.00	\$0		
340	4420	Materials	\$25.76	\$15.09	\$20.83	\$5,500		
350	4430	Contract Costs	\$27.52	\$43.25	\$41.67	\$11,000		
360	Total	Ordinary Maintenance & Operation Expense (lines 330 to 350)	\$53.28	\$58.34	\$62.50	\$16,500		
Protective Services:								
370	3110	Labor	\$0.00	\$0.00	\$0.00	\$0		
380	3120	Materials	\$0.00	\$0.00	\$0.00	\$0		
390	3190	Contract Costs	\$0.00	\$0.00	\$0.00	\$0		
400	Total	Protective Service Expense (sum of lines 370 to 390)	\$0.00	\$0.00	\$0.00	\$0		
General Expense:								
410	4510	Insurance	\$45.53	\$46.62	\$47.35	\$12,500		
420	4520	Payments in Lieu of Taxes	\$7.34	\$2.95	\$11.44	\$3,020		
430	4530	Terminal Leave Payments	\$0.00	\$0.00	\$0.00	\$0		
440	4540	Employee Benefit Contributions	\$20.55	\$24.62	\$25.23	\$6,660		
450	4570	Collection Losses	\$6.70	\$3.79	\$6.82	\$1,800		
460	4590	Other General Expense	\$0.00	\$0.00	\$0.00	\$0		
470	Total	General Expense (sum of lines 410 to 460)	\$80.12	\$77.98	\$90.84	\$23,980		
480	Total	Routine Expense (sum of lines 210,250,320,360,400, and 470)	\$291.63	\$321.42	\$357.85	\$94,470		
Rent for Leased Dwellings:								
490	4710	Rents to Owners of Leased Dwellings						
500	Total	Operating Expense (sum of lines 480 and 490)						
Nonroutine Expenditures:								
510	4610	Extraordinary Maintenance	\$1.50	\$0.00	\$0.00	\$0		
520	7520	Replacement of Nonexpendable Equipment	\$0.00	\$0.00	\$0.00	\$0		
530	7540	Property Betterments and Additions	\$0.00	\$0.00	\$0.00	\$0		
540	Total	Nonroutine Expenditures (sum of lines 510, 520, and 530)	\$1.50	\$0.00	\$0.00	\$0		
550	Total	Operating Expenditures (sum of lines 500 and 540)	\$293.13	\$321.42	\$357.85	\$94,470		
Prior Year Adjustments:								
560	6010	Prior Year Adjustments Affecting Residual Receipts	\$0.00	\$0.00	\$0.00	\$0		
Other Expenditures:								
570		Deficiency in Residual Receipts at End of Preceding Fiscal Year						
580	Total	Operating Expenditures, including prior year adjustments and other expenditures (line 550 plus or minus line 560 plus 570)	\$293.13	\$321.42	\$357.85	\$94,470		
590		Residual Receipts (or Deficit) before HUD Contributions and provision for operating reserve (line 130 minus line 580)	(\$136.67)	(\$137.14)	(\$167.68)	(\$45,930)		
HUD Contributions:								
600	8010	Basic Annual Contribution Earned - Leased Projects:Current Yr						
610	8011	Prior Year Adjustments - (Debit) Credit						
620	Total	Basic Annual Contribution (line 600 plus or minus line 610)						
630	8020	Contributions Earned - Op.Sub:-Cur.Yr. (before year-end adj)			\$266.59	\$70,379		
640		Mandatory PFS Adjustments (net):			\$0.00	\$0		
650		Other (specify):						
660		Other (specify):						
670		Total Year-end Adjustments/Other (plus or minus 640-660)	\$0.00	\$0.00	\$0.00	\$0		
680	8020	Total Operating Subsidy-current year (630 plus or minus 670)	\$247.36	\$222.80	\$266.59	\$70,379		
690	Total	HUD Contributions (sum of lines 620 and 680)	\$247.36	\$222.80	\$266.59	\$70,379		
700		Residual Receipts (or Deficit) (sum of line 590 plus line 690)						
		Enter here and on line 810	\$110.69	\$85.66	\$98.91	\$24,449		

Operating Budget
 Schedule of Administration
 Expenses Other Than Salary

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

OMB Approval No. 2577-0026 (Exp. 9/30/2006)

Public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless that collection displays a valid OMB control number. This information is required by Section 604(4) of the Housing Act of 1937. The information is the operating budget for the low-income housing program and provides a summary of proposed/budgeted receipts and expenditures, approval of budgeted receipts and expenditures, and justification of certain specified amounts. HUD reviews the information to determine if the operating plan adopted by the PHA and the amounts are reasonable and that the PHA is in compliance with procedures prescribed by HUD. Responses are required to obtain benefits. This information does not lend itself to confidentiality.

Name of Housing Authority: **HOUSING AUTHORITY OF THE TOWN OF BASILE** Locality: **BASILE, LA** Fiscal Year End: **DECEMBER 31, 2008**

(1) Description	(2) Total	(3) Management	(4) Development	(5) Section 8	(6) Other
1 Legal Expense (see Special Note in Instructions)	\$0	\$0	\$0	\$0	\$0
2 Training (list and provide justification)	\$300	\$300	\$0	\$0	\$0
3 Travel					
Trips to Conventions and Meetings (list and provide just.)	\$0	\$0	\$0	\$0	\$0
4 Other Travel:					
Outside Area of Jurisdiction	\$1,200	\$1,200	\$0	\$0	\$0
5 Within Area of Jurisdiction	\$1,000	\$1,000	\$0	\$0	\$0
6 Total Travel	\$2,200	\$2,200	\$0	\$0	\$0
7 Accounting	\$7,000	\$7,000	\$0	\$0	\$0
8 Auditing	\$4,000	\$4,000	\$0	\$0	\$0
9 Sundry					
Rental of Office Space	\$0	\$0	\$0	\$0	\$0
10 Publications	\$200	\$200	\$0	\$0	\$0
11 Membership Dues and Fees (list orgn. and amount)	\$150	\$150	\$0	\$0	\$0
12 Telephone, Fax, Electronic Communications	\$3,000	\$3,000	\$0	\$0	\$0
13 Collection Agent Fees and Court Costs	\$100	\$100	\$0	\$0	\$0
14 Administrative Services Contracts (list and provide just.)	\$0	\$0	\$0	\$0	\$0
15 Forms, Stationary and Office Supplies	\$1,000	\$1,000	\$0	\$0	\$0
16 Other Sundry Expense (provide breakdown)	\$4,000	\$4,000	\$0	\$0	\$0
17 Total Sundry	\$8,450	\$8,450	\$0	\$0	\$0
18 Total Administration Expense Other Than Salaries	\$21,950	\$21,950	\$0	\$0	\$0

PERCENTAGE OF EXPENSES TO BE CHARGED TO MANAGEMENT: 100.00%

	Total	Management	Other Programs
Line 7: Data Processing Costs =	\$7,750	\$7,750	\$0
Accounting Costs =	\$0	\$0	\$0
	=====	=====	=====
	\$7,750	\$7,750	\$0

To the best of my knowledge, all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties.
 (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Signature of authorized representative and Date:

X

Operating Budget

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

OMB Approval No. 2577-0026 (exp. 9/30/2006)

See page four for instructions and the Public reporting burden statement

a. Type of Submission [X] Original [] Revision No. :		b. Fiscal Year Ending DECEMBER 31, 2008	c. No. of months [X] 12 mo.	d. Type of HUD assisted project(s)				
e. Name of Public Housing Agency/Indian Housing Authority (PHA/IHA) HOUSING AUTHORITY OF THE TOWN OF BASILE				01	<input checked="" type="checkbox"/>	PHA/IHA-Owned Rental Housing		
f. Address (city, State, zip code)				02	<input type="checkbox"/>	IHA Owned Mutual Help Homeownership		
g. ACC Number FW340				03	<input type="checkbox"/>	PHA/IHA Leased Rental Housing		
h. PAS/LOCCS Project No. LA05800108D				04	<input type="checkbox"/>	PHA/IHA Owned Turnkey III Homeownership		
i. HUD Field Office				05	<input type="checkbox"/>	PHA/IHA Leased Homeownership		
j. No. of Dwelling Units 22		k. No. of Unit Months Available 264	m. No. of Projects					
Line No.	Acct. No.	Description (1)	Actuals		Estimates		Requested Budget Estimates	
			Last Fiscal Yr. 2006 PUM (2)	or Actual Current Budget Yr. 2007 PUM (3)	PHA/IHA Estimates PUM (4)	Amount (To Nearest \$10) (5)	HUD Modifications PUM (6)	Amount (To Nearest \$10) (7)
Homebuyers Monthly Payments for:								
010	7710	Operating Expenses						
020	7712	Earned Home Payments Account						
030	7714	Nonroutine Maintenance Reserves						
040	Total Break-Even Amount (sum of lines 010, 020, and 030)							
050	7716	Excess (or Deficit) in Break-Even Amount						
060	7790	Homebuyers Monthly Payments (Contra)						
Operating Receipts								
070	3110	Dwelling Rentals	\$145.85	\$179.46	\$185.36	\$47,270		
080	3120	Excess Utilities	\$0.00	\$0.00	\$0.00	\$0		
090	3190	Nondwelling Rentals	\$0.00	\$0.00	\$0.00	\$0		
100	Total Rental Income (sum of lines 070, 080, and 090)		\$145.85	\$179.46	\$185.36	\$47,270		
110	3610	Interest on General Fund Investments	\$0.63	\$0.80	\$0.79	\$210		
120	3690	Other Operating Receipts	\$9.98	\$4.02	\$4.02	\$1,060		
130	Total Operating Income (sum of lines 100, 110, and 120)		\$156.46	\$184.28	\$190.17	\$48,540		
Operating Expenditures - Administration:								
140	4110	Administrative Salaries	\$52.00	\$55.87	\$56.74	\$14,980		
150	4130	Legal Expense	\$0.00	\$0.00	\$0.00	\$0		
160	4140	Staff Training	\$0.00	\$1.25	\$1.14	\$300		
170	4150	Travel	\$5.50	\$7.58	\$8.33	\$2,200		
180	4170	Accounting Fees	\$15.98	\$23.48	\$26.52	\$7,000		
190	4171	Auditing Fees	\$0.00	\$0.00	\$15.15	\$4,000		
200	4190	Other Administrative Expenses	\$17.93	\$27.73	\$32.01	\$8,450		
210	Total Administrative Expense (sum of line 140 thru 200)		\$91.41	\$115.91	\$139.89	\$36,930		
Tenant Services:								
220	4210	Salaries	\$0.00	\$0.00	\$0.00	\$0		
230	4220	Recreation, Publications and Other Services	\$0.00	\$0.00	\$0.00	\$0		
240	4230	Contract Costs, Training and Other	\$0.00	\$0.00	\$0.00	\$0		
250	Total Tenant Services Expense (sum of lines 220, 230, 240)		\$0.00	\$0.00	\$0.00	\$0		
Utilities:								
260	4310	Water	\$2.73	\$2.66	\$2.84	\$750		
270	4320	Electricity	\$9.16	\$8.95	\$8.60	\$2,270		
280	4330	Gas	\$54.93	\$57.58	\$53.18	\$14,040		
290	4340	Fuel	\$0.00	\$0.00	\$0.00	\$0		
300	4350	Labor	\$0.00	\$0.00	\$0.00	\$0		
310	4390	Other utilities expense	\$0.00	\$0.00	\$0.00	\$0		
320	Total Utilities Expense (sum of line 260 thru line 310)		\$66.82	\$69.19	\$64.62	\$17,060		

Line No.	Acct. No.	Description (1)	Actuals Last Fiscal Yr. 2006 PUM (2)	<input checked="" type="checkbox"/> Estimates or Actual Current Budget Yr. 2007 PUM (3)	Requested Budget Estimates			
					PHA/IHA Estimates		HUD Modifications	
					PUM (4)	Amount (To Nearest \$10) (5)	PUM (6)	Amount (To Nearest \$10) (7)
Ordinary Maintenance and Operation:								
330	4410	Labor	\$0.00	\$0.00	\$0.00	\$0		
340	4420	Materials	\$25.76	\$15.09	\$20.83	\$5,500		
350	4430	Contract Costs	\$27.52	\$43.25	\$41.67	\$11,000		
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Protective Services:								
370	3110	Labor	\$0.00	\$0.00	\$0.00	\$0		
380	3120	Materials	\$0.00	\$0.00	\$0.00	\$0		
390	3190	Contract Costs	\$0.00	\$0.00	\$0.00	\$0		
400	Total	Protective Service Expense (sum of lines 370 to 390)	\$0.00	\$0.00	\$0.00	\$0		
General Expense:								
410	4510	Insurance	\$45.53	\$46.62	\$47.35	\$12,500		
420	4520	Payments in Lieu of Taxes	\$7.34	\$2.95	\$11.44	\$3,020		
430	4530	Terminal Leave Payments	\$0.00	\$0.00	\$0.00	\$0		
440	4540	Employee Benefit Contributions	\$20.55	\$24.62	\$25.23	\$6,660		
450	4570	Collection Losses	\$6.70	\$3.79	\$6.82	\$1,800		
460	4590	Other General Expense	\$0.00	\$0.00	\$0.00	\$0		
470	Total	General Expense (sum of lines 410 to 460)	\$80.12	\$77.98	\$90.84	\$23,980		
480	Total	Routine Expense (sum of lines 210,250,320,360,400, and 470)	\$291.63	\$321.42	\$357.85	\$94,470		
Rent for Leased Dwellings:								
490	4710	Rents to Owners of Leased Dwellings						
500	Total	Operating Expense (sum of lines 480 and 490)						
Nonroutine Expenditures:								
510	4610	Extraordinary Maintenance	\$1.50	\$0.00	\$0.00	\$0		
520	7520	Replacement of Nonexpendable Equipment	\$0.00	\$0.00	\$0.00	\$0		
530	7540	Property Betterments and Additions	\$0.00	\$0.00	\$0.00	\$0		
540	Total	Nonroutine Expenditures (sum of lines 510, 520, and 530)	\$1.50	\$0.00	\$0.00	\$0		
550	Total	Operating Expenditures (sum of lines 500 and 540)	\$293.13	\$321.42	\$357.85	\$94,470		
Prior Year Adjustments:								
560	6010	Prior Year Adjustments Affecting Residual Receipts	\$0.00	\$0.00	\$0.00	\$0		
Other Expenditures:								
570		Deficiency in Residual Receipts at End of Preceding Fiscal Year						
580	Total	Operating Expenditures, including prior year adjustments and other expenditures (line 550 plus or minus line 560 plus 570)	\$293.13	\$321.42	\$357.85	\$94,470		
590		Residual Receipts (or Deficit) before HUD Contributions and provision for operating reserve (line 130 minus line 580)	(\$136.67)	(\$137.14)	(\$167.68)	(\$45,930)		
HUD Contributions:								
600	8010	Basic Annual Contribution Earned - Leased Projects: Current Yr						
610	8011	Prior Year Adjustments - (Debit) Credit						
620	Total	Basic Annual Contribution (line 600 plus or minus line 610)						
630	8020	Contributions Earned - Op Sub:-Cur.Yr. (before year-end adj)			\$266.59	\$70,379		
640		Mandatory PFS Adjustments (net):			\$0.00	\$0		
650		Other (specify):						
660		Other (specify):						
670		Total Year-end Adjustments/Other (plus or minus 640-660)	\$0.00	\$0.00	\$0.00	\$0		
680	8020	Total Operating Subsidy-current year (630 plus or minus 670)	\$247.36	\$222.80	\$266.59	\$70,379		
690	Total	HUD Contributions (sum of lines 620 and 680)	\$247.36	\$222.80	\$266.59	\$70,379		
700		Residual Receipts (or Deficit) (sum of line 590 plus line 690)						
		Enter here and on line 810	\$110.69	\$85.66	\$98.91	\$24,449		

Operating Budget
Schedule of Administration
Expenses Other Than Salary

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

OMB Approval No. 2577-0026 (Exp. 9/30/2006)

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Name of Housing Authority:		Locality:		Fiscal Year End:	
HOUSING AUTHORITY OF THE TOWN OF BASILE		BASILE, LA		DECEMBER 31, 2008	
(1)	(2)	(3)	(4)	(5)	(6)
Description	Total	Management	Development	Section 8	Other
1 Legal Expense (see Special Note in Instructions)	\$0	\$0	\$0	\$0	\$0
2 Training (list and provide justification)	\$300	\$300	\$0	\$0	\$0
3 Travel					
Trips to Conventions and Meetings (list and provide just.)	\$0	\$0	\$0	\$0	\$0
4 Other Travel:					
Outside Area of Jurisdiction	\$1,200	\$1,200	\$0	\$0	\$0
5 Within Area of Jurisdiction	\$1,000	\$1,000	\$0	\$0	\$0
6 Total Travel	\$2,200	\$2,200	\$0	\$0	\$0
7 Accounting	\$7,000	\$7,000	\$0	\$0	\$0
8 Auditing	\$4,000	\$4,000	\$0	\$0	\$0
9 Sundry					
Rental of Office Space	\$0	\$0	\$0	\$0	\$0
10 Publications	\$200	\$200	\$0	\$0	\$0
11 Membership Dues and Fees (list orgn. and amount)	\$150	\$150	\$0	\$0	\$0
12 Telephone, Fax, Electronic Communications	\$3,000	\$3,000	\$0	\$0	\$0
13 Collection Agent Fees and Court Costs	\$100	\$100	\$0	\$0	\$0
14 Administrative Services Contracts (list and provide just.)	\$0	\$0	\$0	\$0	\$0
15 Forms, Stationary and Office Supplies	\$1,000	\$1,000	\$0	\$0	\$0
16 Other Sundry Expense (provide breakdown)	\$4,000	\$4,000	\$0	\$0	\$0
17 Total Sundry	\$8,450	\$8,450	\$0	\$0	\$0
18 Total Administration Expense Other Than Salaries	\$21,950	\$21,950	\$0	\$0	\$0

PERCENTAGE OF EXPENSES TO BE CHARGED TO MANAGEMENT: 100.00%
 =====

	Total	Management	Other Programs
Line 7: Data Processing Costs =	\$7,750	\$7,750	\$0
Accounting Costs =	\$0	\$0	\$0
	=====	=====	=====
	\$7,750	\$7,750	\$0

To the best of my knowledge, all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties.

(18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Signature of authorized representative and Date:

X