

PHA Plans

Streamlined Annual Version

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

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

Privacy Act Notice. The United States Department of Housing and Urban Development, Federal Housing Administration, is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Information in PHA plans is publicly available.

Streamlined Annual PHA Plan

for Fiscal Year: 2008

PHA Name: Housing Authority of the City of Meridian

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

Streamlined Annual PHA Plan Agency Identification

PHA Name: Housing Authority of the City of Meridian
PHA Number: MS004

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

PHA Programs Administered:

Public Housing and Section 8 **Section 8 Only** **Public Housing Only**
Number of public housing units: 1071 Number of S8 units: Number of public housing units:
Number of S8 units: 148

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

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

PHA Plan Contact Information:

Name: Ron Turner Phone: 601-693-4285
TDD: 601-693-4285 Email (if available): rturner@meridianhousing.net

Public Access to Information

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

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

Display Locations For PHA Plans and Supporting Documents

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

If yes, select all that apply:

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

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

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

Streamlined Annual PHA Plan
Fiscal Year 2008
[24 CFR Part 903.12(c)]

Table of Contents
[24 CFR 903.7(r)]

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

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A. PHA PLAN COMPONENTS

- 1. Site-Based Waiting List Policies
903.7(b)(2) Policies on Eligibility, Selection, and Admissions
- 2. Capital Improvement Needs
903.7(g) Statement of Capital Improvements Needed
- 3. Section 8(y) Homeownership
903.7(k)(1)(i) Statement of Homeownership Programs
- 4. Project-Based Voucher Programs
- 5. PHA Statement of Consistency with Consolidated Plan. Complete only if PHA has changed any policies, programs, or plan components from its last Annual Plan.
- 6. Supporting Documents Available for Review
- 7. Capital Fund Program and Capital Fund Program Replacement Housing Factor, Annual Statement/Performance and Evaluation Report
- 8. Capital Fund Program 5-Year Action Plan

B. SEPARATE HARD COPY SUBMISSIONS TO LOCAL HUD FIELD OFFICE

Form HUD-50076, PHA Certifications of Compliance with the PHA Plans and Related Regulations: Board Resolution to Accompany the Streamlined Annual Plan identifying policies or programs the PHA has revised since submission of its last Annual Plan, and including Civil Rights certifications and assurances the changed policies were presented to the Resident Advisory Board for review and comment,

approved by the PHA governing board, and made available for review and inspection at the PHA's principal office;

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

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

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

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

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

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

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

A. Site-Based Waiting Lists-Previous Year

1. Has the PHA operated one or more site-based waiting lists in the previous year? No If yes, complete the following table; if not skip to B.

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

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

B. Site-Based Waiting Lists – Coming Year

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

1. How many site-based waiting lists will the PHA operate in the coming year?
2. 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)

2. Capital Improvement Needs

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

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

A. Capital Fund Program

1. Yes No Does the PHA plan to participate in the Capital Fund Program in the upcoming year? If yes, complete items 7 and 8 of this template (Capital Fund Program tables). If no, skip to B. **See attachments ms004e01 and ms004f01.**
2. Yes No: Does the PHA propose to use any portion of its CFP funds to repay debt incurred to finance capital improvements? If so, the PHA must identify in its annual and 5-year capital plans the development(s) where such improvements will be made and show both how the proceeds of the financing will be used and the amount of the annual payments required to service the debt. (Note that separate HUD approval is required for such financing activities.). **See Attachment ms004g01.**

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

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

1. Yes No: Has the PHA received a HOPE VI revitalization grant? (if no, skip to #3; if yes, provide responses to the items on the chart located on the next page,

copying and completing as many times as necessary). See attachment **ms004d01**

2. Status of HOPE VI revitalization grant(s):

HOPE VI Revitalization Grant Status	
a. Development Name:	Victory Village
b. Development Number:	MS004-005
c. Status of Grant:	
<input checked="" type="checkbox"/>	Revitalization Plan under development
<input type="checkbox"/>	Revitalization Plan submitted, pending approval
<input checked="" type="checkbox"/>	Revitalization Plan approved
<input checked="" type="checkbox"/>	Activities pursuant to an approved Revitalization Plan underway

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

4. Yes No: Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year? If yes, list developments or activities below: The Frank Berry housing development is planned for mixed financing activities with tax credits and HOPE VI

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

3. Section 8 Tenant Based Assistance--Section 8(y) Homeownership Program
(if applicable) [24 CFR Part 903.12(c), 903.7(k)(1)(i)]

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

2. Program Description:

We anticipate the goals and objects of the MHA (Housing Authority of the City of Meridian), Homeownership Program is as follows:

1. Provide low-income families in the City of Meridian and Lauderdale County with decent, safe and affordable housing, and to become self-sufficient.
 - a. To provide Homeownership opportunities to low income families.

- b. To increase the capacity of low income families to successfully maintain their homes and the mortgage through administering counseling, educational training program to insure the success of each homebuyer.
 - c. To assure the homebuyers commitment and capacity to assume the responsibilities of homeownership.
2. To produce a positive economic impact and promote development in the Meridian community by:
- a. Improving the housing stock through refurbishing substandard residential property.
 - b. Locating new homebuyers in neighborhoods facing a transition from owner occupied to rent occupied units.
 - c. Expanding the capacity of families to have a stake in their neighborhood and to contribute to the economic growth to the community.

a. Size of Program

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

If the answer to the question above was yes, what is the maximum number of participants this fiscal year? 50

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:

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

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

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

- Establishing a minimum homeowner down payment requirement of at least 3 percent of purchase price and requiring that at least 1 percent of the purchase price comes from the family's resources.
- Requiring that financing for purchase of a home under its Section 8 homeownership will be provided, insured or guaranteed by the state or Federal government; comply with secondary mortgage market underwriting requirements; or comply with generally accepted private sector underwriting standards.
- Partnering with a qualified agency or agencies to administer the program (list name(s) and years of experience below): Mississippi Home Corp with 6 years experience and Multi-county Community Service Agency with 5 years experience
- Demonstrating that it has other relevant experience (list experience below): MHA has administered its' HCV Program for three years and has provided contract administration for 4 properties for more than 10 years.

4. Use of the Project-Based Voucher Program

Intent to Use Project-Based Assistance

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

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

5. PHA Statement of Consistency with the Consolidated Plan

[24 CFR Part 903.15]

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

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

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

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

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

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

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

The Capital Fund Program Annual Statement is provided as an attachment to the PHA Streamline Plan as attachment: **ms004e01**

8. Capital Fund Program Five-Year Action Plan

The Capital Fund Program Five-Year Action Plan is provided as an attachment to the PHA Streamline Plan at Attachment **ms004f01**

ATTACHMENT – ms004a01
ANNUAL PLAN PROGRESS REPORT (FOR FY 2007)

The Housing Authority of the City of Meridian

Meridian, Mississippi

FY 2007

Annual Plan Progress Report
For Year Two – FY 2008

NOTE: THIS PHA PLAN'S TEMPLATE (HUD 50075) IS TO BE COMPLETED IN ACCORDANCE WITH INSTRUCTIONS LOCATED IN APPLICABLE PIH NOTICES

Streamlined Five-Year PHA Plan

PHA FISCAL YEARS 2005 - 2009

[24 CFR Part 903.12]

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 MHA 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 crime and discrimination.
- The Meridian Housing Authority's mission is:
To provide affordable, decent, safe and affordable housing with reasonable accommodations for eligible citizens of Meridian, Mississippi, and programs that promote self-sufficiency, empowerment and respect.

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:
Progress Report: As of 12-31-07, MHA received two additional DVP vouchers increasing its number of baseline HCV vouchers to 150. MHA plans to apply for additional vouchers by 12-31-08.
- Reduce public housing vacancies: Maintain an annual public housing vacancy rate of 3% or less or an adjusted vacancy rate of 2% or less by March 31, 2009.
Progress Report: As of 12-31-07, the Meridian Housing Authority has an annual adjusted vacancy rate of approximately 2%.
- Leverage private or other public funds to create additional housing opportunities:
Progress Report: MHA received funding for a \$17.3 million Hope VI grant in June of 2004 and revitalization efforts are currently under way to rebuild the Victory Village Housing Development. Bond proceeds of \$8.8 million dollars have been secured and 72 units of mixed-income housing were constructed at the J. T. Davis Housing Development on July 1, 2007. . Re-occupancy process at J.T. Davis is also complete was completed as of July 30, 2007.

- ☒ Acquire or build units or developments
Progress Report: Hope VI efforts are currently underway at Victory Village Carousel Place; Bond proceeds were utilized to totally revitalize 72 units at the J.T. Davis public housing development.
 Also, MHA is planning to submit a mixed financing packet by 12-31-08 to either modernize, place under disposition, or demolish the Frank Berry Housing Development. MHA will also finalize its assessment and present to HUD its plan to place 81 units of MHA owned market rate units (Queen City) under the ACC.

- ☒ Other (list below)
 Acquire land to construct replacement housing by March 2009, to provide self-sufficiency opportunities to residents of public housing.
Progress Report: (242) units of affordable housing are slated for completion under the Hope VI Victory Village revitalization plan. Twenty (20) of the units will be set aside for homeownership opportunities and the first option to purchase these homes will be made available to public housing eligible residents. MOUs have been signed to purchase two potential properties. MHA has purchased two additional parcels of properties in the Victory Village Community in an effort to provide self sufficiency opportunities to MHA residents.

- ☒ PHA Goal: Improve the quality of assisted housing

Objectives:

- ☒ Improve public housing management: (PHAS score 91) HUD will continue to recognize the MHA as a high performer with a PHAS score of 90% or greater with no single indicator with a score below C by March 31, 2009.
Progress Report: On 3-31-05, HUD recognized the Meridian Housing Authority as a High Performer with an overall PHAS score of 92. On 3-31-07, MHA repeated its High Performer status after receiving a waiver suspension notification approval from HUD. The waiver suspension notification was approved due to the devastation caused by Hurricane Katrina. MHA is currently involved in efforts to restructure the agency to meet asset management protocols.
- ☒ Improve voucher management: (SEMAP score 96)
Progress Report: MHA received a SEMAP score of 96% ending fiscal year March '05. MHA repeated its High Performer status after receiving a SEMAP suspension notification approval from HUD due to Hurricane Katrina's devastation.
- ☒ Increase customer satisfaction:
Progress Report: As of 12-28-07, the Meridian Housing Authority has shown the following progress in our customer satisfaction scores. During the FY'07 year, the Department of Housing and Urban Development did not submit the RASS survey to public housing residents at the Meridian Housing Authority.

<u>FY 2005</u>		<u>FY 2006</u>		<u>FY 2007</u>	
Maintenance:	89.0%	Maintenance:	79.7%	Maintenance:	N/A
Communication:	74.7%	Communication:	75.1%	Communication:	N/A
Safety:	79.1%	Safety:	74.3%	Safety:	N/A
Service:	92.3%	Service:	84.7%	Service:	N/A
Neighborhood appearance:	67.6%	Neighborhood appearance:	63.3%	Neighborhood appearance:	N/A

As of 12-28-07, MHA has conducted approximately 177 customer service calls to its residents. Additionally, 438 quality control inspections were conducted from January 1, 2007 to December 31, 2007. Effective April 1, 2008 MHA's RAB will conduct customer service calls and quality control protocols.

- ☒ Concentrate on efforts to improve specific management functions:
(list; e.g., public housing finance; voucher unit inspections)
MHA will continue to provide training/cross training opportunities to staff within departments
During its efforts to convert to Project-Based Accounting and Asset Management, MHA will provide additional training for the Accounting department in financial statements, budgets, and departmental budgeting. MHA will implement procedures/accounting manual by March 31, 2008.
Progress Report: This is an on-going objective. As of 12-28-07, MHA has provided cross training efforts in the following departments:

Housing Management
Leasing/Occupancy
Resident Services

Cash Collections
Procurement

Maintenance
Accounting

MHA continues to provide training to all departments. The accounting department continues to receive additional training in financial statements, budget, and departmental budgeting. A Director of Finance is being sought and MHA is in the process of converting to project based accounting and asset management protocols.

Progress Report: As of 12-28-07, MHA has completed 100% of training in the following areas: Public Housing and Section 8 voucher program; understanding and implementing financial statements, budget and departmental budget; Section 3 and Labor Standard Enforcement; Upfront Income Verification (EIV) Training of staff will continue to be a top-priority for MHA.

- ☒ Renovate or modernize public housing units: Ongoing
Progress Report: As of 12-28-2007, MHA has provided electrical upgrades at MS004-012A, MS004-012B and MS004-12C. Major renovations are currently completed at MS004-003. As of 12-28-0, MS004-003 is fully occupied.
- ☒ Demolish or dispose of obsolete public housing: March 2009
Progress Report: MHA received a Hope VI grant to demolish and revitalize the Victory Village Community. Revitalization Plan is underway and demolition is complete. J. T. Davis Housing Development has been demolished and revitalization was completed. Closing documents are completed for Victory Village and reoccupancy is expected to be completed by September of 2009.
- ☒ Provide replacement public housing: March 2009

Progress Report: Infrastructure and revitalization efforts began at J. T. Davis in February of 2006. Replacement housing efforts have started in the razed Victory Village Housing Community January '07. The project is expected to be completed by September 2009.

Provide replacement vouchers: March 2009

Progress Report: As of 12-28-07, MHA has not applied for replacement vouchers however MHA has absorbed two DVP voucher bringing its baseline count from 148 up to 150 HCV participants.

Other: (list below)

PHA Goal: Increase assisted housing choices

Objectives:

Provide voucher mobility counseling: Ongoing

Progress Report: Voucher mobility counseling sessions are held monthly by MHA intake staff.

Conduct outreach efforts to potential voucher landlords

Progress Report: MHA conducted landlord briefing sessions in February and additional sessions are scheduled for August 2008. Additionally, MHA has developed a website which promotes the Section 8 efforts of the authority. MHA has been recognized by HUD as a High Performer in the area of managing its Housing Choice Voucher program. MHA has also procured the services of a professional public relations firm and a DVD has been produced to inform potential voucher landlord about MHA's HCV program.

Increase voucher payment standards

Implement voucher homeownership program:

Progress Report: As of 12-28-05, MHA has entered into an MOU with the Mississippi Home Corporation, with Multi County Community Service Agency, Inc. (MCCSA) to provide counseling and training to MHA residents relative to the homeownership program. Homeownership program has been officially implemented and 27 participants are actively involved. Two participants have purchased homes and 19 participants have established escrow accounts.

Implement public housing or other homeownership programs:

Consistent with national and state public housing philosophies of helping resident achieve self-sufficiency, MHA was the first Authority in the state to acquire existing single family homes. The goal of the program is home ownership for qualified MHA residents Housing Choice Voucher participants, and local eligible residents.

Progress Report: As of 12-15-06, MHA received an FSS public Housing Ross Grant to implement the homeownership program to include 25 public housing residents. A coordinator has been hired and 32 residents are receiving services which will allow homeownership opportunities. To date, 18 residents have

established escrow accounts and 5 public housing FSS participants are enrolled in the AmeriCorp construction (Section 3) training program.

- Implement public housing site-based waiting lists:
Progress Report: On going
- Convert public housing to vouchers: Review by March 2008
Progress Report: This objective is scheduled for review in March '08
- Other: (list below)

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

- PHA Goal: Provide an improved living environment
Objectives:
 - Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
At least twice a year during the next five years, MHA will offer rental specials such as one month rent-free options.
MHA will also use the HUD suggested practice of skipping others on the waiting list to accomplish the deconcentration of poverty.
of poverty.
Progress Report: MHA currently offers rental specials of one month free-rent incentives at Eastern & Western Gardens in an effort to bring high income households into lower income developments. (See deconcentration of poverty policy attachment). MHA's resident advisory also provides monthly incentives for "yard of the month" and "property of the month".
 - Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
(See Deconcentration of Poverty Policy Attachment **ms004a01**)
 - Implement public housing security improvements:
MHA will reduce by 10% the overall Part I crime in developments by March 31, 2009.
 - a. MHA will reduce by 10% the overall Part II crime in the developments by March 31, 2009.
 - b. MHA will contract community policing services through the Meridian Police department to patrol all properties seven days a week.
 - c. MHA will maintain contracts with non-profit agencies such as the Youth Excitement Team and Boys & Girls Club to provide recreation and other drug-free alternative activities.
 - d. MHA will increase by 10% the annual enrollment in the Neighborhood Network Center by March 31, 2009.
- Progress Report:** As of April 14, 2007, MHA renewed its contract with the Meridian Police Department to provide security services for the authority. The police department provides two full-time officers and a pool of officers who

supplies the authority with community-policing services in and around all properties managed by the authority. The policing service provides daily activity log sheets identifying calls for service by the residents and daily incident reports on criminal activities occurring on and around the development of the authority.

The policing service provides monthly crime statistics that reflect incidents resulting in arrest as opposed to calls for service. This information is forwarded to MHA management and lease enforcement is enacted immediately.

As a result of the relationship between MHA and MPD Part I crimes in the developments which include: a) assaults; b) burglaries, c) arsons, d) auto theft, e) drug activities, f) murders, g) rape, h) hate crimes as of 12-31-07 produced a slight decrease in comparison to 12-31-06.

Part II crimes which are identified as: a) discharged weapons, b) vandalism, c) fights, d) suspicious vehicles, e) disturbances produced a slight decrease in comparison to 12-31-06.

Approximately 349 criminal violators have been identified by MPD and banned from all MHA managed properties.

MHA continues to contract with non-profit and Faith Based such as the Boys and Girls Club, Boys and Girl Scouts of America, Free Gospel Temple, and 4-H Clubs of Mississippi in an effort to provide recreation and other drug-free alternative activities for the youth population. Over 60 MHA youth participated in a variety of recreational events such as football camp sponsored by NFL football players; baseball and basketball tournaments.

MHA has hired a Community Organizer to assist in encouraging and promoting after school tutoring and computer literacy enrollment at Neighborhood Network Center. Enrollment has increased over 10% since last year.

Designate developments or buildings for particular resident groups (elderly, persons with disabilities)

Progress Report: MHA currently has community-rooms at each development site which are being utilized by many of its senior residents. The newly renovated Neighborhood Network Center offers numerous opportunities for elderly resident activities. The Ameri-Corp Rebuilds Mississippi program will provide volunteers to complete structural upgrades to the Highway Village Community Center, for the purpose of providing community space for the city wide Resident Advisory Board's activities.

MHA submitted a Designated Housing Plan for the HOPE VI Carousel Place (formerly Victory Village). The Plan was approved during the fourth quarter of 2007 and will allow 22 units at the aforementioned site to be occupied by senior residents only.

Other: (list below)

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: MHA will continue to work with Meridian Community College to provide entrepreneurial training, job search, and employability workshop for residents.

MHA will continue partnerships with community service agencies such as:

- a. Multi-County Community Service Agency (MCCSA)
- b. Senior Aides
- c. East Central Planning and Development District (ECPDD)
- d. Meridian Public School System
- e. Youth Excitement Team

Progress Report: As of 12-28-05, MHA has employed the services of a Neighborhood Network coordinator who currently conducts work force training classes to MHA residents. 22 MHA residents are currently enrolled in the Workforce Development classes, 7 residents graduated during the fourth quarter of 2007.

Provide or attract supportive services to improve assistance recipients' employability:

MHA will continue to partner with the Department of Human Services in affording residents the opportunity to gain on-the-job training.

MHA will provide our residents on-the-job training through the Ameri-Corp Program.

MHA will continue to provide residents the opportunity to receive their GED and job trainings four days a week in the newly renovated Neighborhood Network Center and MCC WEBB Center. *MHA will continue early intervention through its pre-kindergarten programs and "Parents As Teachers" in partnership with Meridian Public Schools.

Progress Report: As of 12-28-08, MHA continues to partner with the Department of Human Services in affording residents to opportunity to gain on-the-job training opportunities.

- MHA continues to provide our residents with "on-the-job training opportunities" through the Ameri-Corps Program.
- MHA continues to provide residents the opportunity to receive adult basic education and GED opportunities along with workforce investment job training four days a week in the Neighborhood Network Center and MCC WEBB Center. MHA has partnered with the Meridian Public School District and has full-time early intervention programs on four of its housing sites.

Provide or attract supportive services to increase independence for the elderly or

families with disabilities.

MHA will continue to apply annually for the EDSS funds available

MHA will continue to partner with the following agencies in providing programs to assist elderly and disabled families in continuous independent living:

1. Multi-County Community Service Agency
2. East Central Planning and Development District
3. Senior Aides
4. Weems Senior Life
5. Deaconess Home Health Care

MHA has employed the services of a Resident Service Coordinator to oversee activities of its senior population.

Progress Report: MHA will continue to apply for the EDSS funds available through the NOFA. MHA continues to partner with the following agencies to provide programs to assist elderly and disabled families in continuous independent living:

- 1) Multi-County Community Service Agency (MCCSA)
- 2) Senior Aides

MHA has employed the services of a Resident Service Coordinator to oversee activities of its senior population.

Other: (list below)

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

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

Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:
Progress Report: on going

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:
Progress Report: on going

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)

1. **Study, evaluate and recommend appropriate supply of affordable housing for low and moderate income household and special need populations**
 - a. Rehabilitate, reconfigure and/or redesign existing properties (on-going)

- b. Determine which properties, if any, should be demolished or disposed (on-going)
 - c. Seek out alternative forms of redevelopment (on-going)
 - d. Increase housing supply for special need populations (on-going)
 - e. Focus on the needs of prospective clients (on-going)
 - f. Expand acquisition of single family homes and implement home ownership program (on-going)
- 1. Identify and initiate services and programs that meet the needs of MHA clients**
 - a. Improve safety, decrease incidence of criminal activity and eliminate conditions that may contribute to crime at all properties (on-going)
 - b. Expand prevention and intervention services in all areas of family care (on-going)
 - c. Expand opportunities for residents to increase job training, life skills development, technology and diversity training.(on-going)
 - d. Provide necessary supportive services associated with special needs housing (on-going)
 - e. Implement site-based programs; establish information liaison.(on-going)
 - 1. Enhance relationships with government agencies and community**
 - a. Improve communications with HUD, local government and service agencies, and the community at-large to ensure program and service awareness.(on-going)
 - b. Coordinate and expand partnerships with existing agencies for increased services for clients.(on-going)
 - 1. Improve financial base; update Authority's policies; implement cross-training of employees**
 - a. Restructure operations in order to reduce costs and increase customer responsiveness.(on-going)
 - b. Implement consolidated financial reporting.(on-going)
 - c. Increase subcontracting opportunities when advantageous to the Authority's fiscal operations.(on-going)
 - d. Review and study long-term impact of salary schedule and employee benefit package(completed)
 - e. Update Authority's policies, including Personnel and Procurement (on-going)
 - f. Seek grants and alternative forms of funding (Grants writer hired)
 - 1. Evaluate Queen City Properties for the purpose of determining routine maintenance needs and extraordinary maintenance needs, as well as long term financial viability of the properties in whole or in part**
 - a. List and prioritize extraordinary maintenance needs based on structural soundness and safety(on-going)
 - b. List and prioritize routine maintenance needs to enhance appearance and to inhibit structural aging(on-going)
 - c. Seek immediate financial help to accomplish extraordinary maintenance (on-going)
 - d. Explore opportunities to sell the properties in whole or in part (on-going)
 - e. Pursue alternative allocation and/or elimination of expenses in order to reach a positive cash flow status(on-going)
 - f. Explore areas in which Queen City, as a separate entity, could pursue other funding and/or non-rental income.(on-going)

Significant Changes to the ACOP discussed during the 2007 MHA Annual Plan Public Hearing

Listed are the significant changes to the ACOP discussed at the November 12, 2007 Annual Plan meeting.

I. Interim Re-determination of Rent Definition change

The term interim determination for "rent" will now state: Any changes to tenant income resulting in a rent adjustment of greater or less than \$50 rent between admissions and recertifications and the next succeeding recertification.

II. Adjustments to application during wait-list period

Applicants must notify MHA in writing if their address changes during the application process. The applicant or head of household is the only person permitted to submit the official form which adds or deletes members to or from the original application.

If the applicant or the head of household wishes to delete themselves in order to relinquish the assistance to another person on the original application, they must do so after a scheduled interview has occurred between the occupancy caseworker and the family, and after approval of MHA management.

III. Criteria for Grounds for Denial of Admission for 2 years

An applicant will be denied admission for two years for the following violations:

- (1) Extensive damage to property;
- (2) Bad housekeeping practices inside and outside of the dwelling;
- (3) Bad rental payment history;
- (4) Disturbances;
- (5) Unauthorized live-ins;
- (6) And the applicant demonstrates hostile behavior during the interview process that indicates that the applicant may be a serious threat to MHA staff or its residents.

IV. Procedure regarding Violence against Women Act (VAWA)

On January the 5th of 2006, President Bush signed VAWA, the Violence Against Women Act, into law as public law 109-162; which requires MHA to contain information regarding goals, activities, objectives, policies, and programs that are intended to support and assist victims of domestic violence, dating violence, sexual assault and stalking.

V. Verification of Preference

After refusal of the first housing offer and the applicant's name is dropped to the bottom of the waiting list, all preferences will also be removed and cannot be reclaimed

regardless of the original preference. If the applicant's preference changes, then the applicant may claim the new preference.

VI. Addition of "Significant Other" to MHA Lease

Once family eligibility has been established in accordance with MHA's admission policy and before a significant other can be added to the lease, significant other must pass the required police background check.

"Significant other" must have financial resources available to assist in supporting the needs of the family. The leaseholder must provide proof that the individual being added has been employed over a 12-month period.

Leaseholder must provide proof whether the individual being added is receiving any other forms of assistance: Example, social security, SSI, etc.

MERIDIAN HOUSING AUTHORITY VIOLENCE AGAINST WOMEN ACT (VAWA) POLICY

I. Purpose and Applicability

The purpose of this policy (herein called “Policy”) is to implement the applicable provisions of the Violence Against Women and Department of Justice Reauthorization Act of 2005 (Pub. L. 109-162) and more generally to set forth MHA’s policies and procedures regarding domestic violence, dating violence, and stalking, as hereinafter defined.

This Policy shall be applicable to the administration by MHA of all federally subsidized public housing and Section 8 rental assistance under the United States Housing Act of 1937 (42 U.S.C. §1437 *et seq.*). Notwithstanding its title, this policy is gender-neutral, and its protections are available to males who are victims of domestic violence, dating violence, or stalking as well as female victims of such violence.

II. Goals and Objectives

This Policy has the following principal goals and objectives:

- A. Maintaining compliance with all applicable legal requirements imposed by VAWA;
- B. Ensuring the physical safety of victims of actual or threatened domestic violence, dating violence, or stalking who are assisted by MHA;
- C. Providing and maintaining housing opportunities for victims of domestic violence dating violence, or stalking;
- D. Creating and maintaining collaborative arrangements between MHA, law enforcement authorities, victim service providers, and others to promote the safety and well-being of victims of actual and threatened domestic violence, dating violence and stalking, who are assisted by MHA; and
- E. Taking appropriate action in response to an incident or incidents of domestic violence, dating violence, or stalking, affecting individuals assisted by MHA.

III. Other MHA Policies and Procedures

This Policy shall be referenced in and attached to MHA’s Five-Year Public Housing Agency Plan and shall be incorporated in and made a part of MHA’s Admissions and Continued Occupancy Policy. MHA’s annual public housing agency plan shall also contain information concerning MHA’s activities, services or programs relating to domestic violence, dating violence, and stalking.

To the extent any provision of this policy shall vary or contradict any previously adopted policy or procedure of MHA, the provisions of this Policy shall prevail.

IV. Definitions

As used in this Policy:

A. *Domestic Violence* – The term ‘domestic violence’ includes felony or misdemeanor crimes of violence committed by a current or former spouse of the victim, by a person with whom the victim shares a child in common, by a person who is cohabiting with or has cohabited with the victim as a spouse, by a person similarly situated to a spouse of the victim under the domestic or family violence laws of the jurisdiction receiving grant monies, or by any other person against an adult or youth victim who is protected from that person’s acts under the domestic or family violence laws of the jurisdiction.”

B. *Dating Violence* – means violence committed by a person—

- (A) who is or has been in a social relationship of a romantic or intimate nature with the victim; and
- (B) where the existence of such a relationship shall be determined based on a consideration of the following factors:
 - (i) The length of the relationship.
 - (ii) The type of relationship.
 - (iii) The frequency of interaction between the persons involved in the relationship.

C. *Stalking* – means –

- (A) (i) to follow, pursue, or repeatedly commit acts with the intent to kill, injure, harass, or intimidate another person; and (ii) to place under surveillance with the intent to kill, injure, harass or intimidate another person; and
- (B) in the course of, or as a result of, such following, pursuit, surveillance or repeatedly committed acts, to place a person in reasonable fear of the death of, or serious bodily injury to, or to cause substantial emotional harm to –
 - (i) that person;
 - (ii) a member of the immediate family of that person; or
 - (iii) the spouse or intimate partner of that person;

D. *Immediate Family Member* - means, with respect to a person –

- (A) a spouse, parent, brother, sister, or child of that person, or an individual to whom that person stands in loco parentis; or
- (B) any other person living in the household of that person and related to that person by blood or marriage.

E. *Perpetrator* – means person who commits an act of domestic violence, dating violence or stalking against a victim.

V. Admissions and Screening

A. *Non-Denial of Assistance.* MHA will not deny admission to public housing or to the Section 8 rental assistance program to any person because that person is or has been a victim of domestic violence, dating violence, or stalking, provided that such person is otherwise qualified for such admission.

VI. Termination of Tenancy or Assistance

A. *VAWA Protections.* Under VAWA, public housing residents and persons assisted under the Section 8 rental assistance program have the following specific protections, which will be observed by MHA:

1. An incident or incidents of actual or threatened domestic violence, dating violence, or stalking will not be considered to be a “serious or repeated” violation of the lease by the victim or threatened victim of that violence and will not be good cause for terminating the tenancy or occupancy rights of or assistance to the victim of that violence.

2. In addition to the foregoing, tenancy or assistance will not be terminated by MHA as a result of criminal activity, if that criminal activity is directly related to domestic violence, dating violence or stalking engaged in by a member of the assisted household, a guest or another person under the tenant’s control, and the tenant or an immediate family member is the victim or threatened victim of this criminal activity. However, the protection against termination of tenancy or assistance described in this paragraph is subject to the following limitations:

(a) Nothing contained in this paragraph shall limit any otherwise available authority of MHA’ or a Section 8 owner or manager to terminate tenancy, evict, or to terminate assistance, as the case may be, for any violation of a lease or program requirement not premised on the act or acts of domestic violence, dating violence, or stalking in question against the tenant or a member of the tenant’s household. However, in taking any such action, neither MHA nor a Section 8 manager or owner may apply a more demanding standard to the victim of domestic violence dating violence or stalking than that applied to other tenants.

(b) Nothing contained in this paragraph shall be construed to limit the authority of MHA or a Section 8 owner or manager to evict or terminate from assistance any tenant or lawful applicant if the owner, manager or MHA, as the case may be, can demonstrate an actual and imminent threat to other tenants or to those employed at or providing service to the property, if the tenant is not evicted or terminated from assistance.

B. *Removal of Perpetrator.* Further, notwithstanding anything in paragraph VI.A.2. or Federal, State or local law to the contrary, MHA or a Section 8 owner or manager, as the case may be, may bifurcate a lease, or remove a household member from a lease, without regard

to whether a household member is a signatory to a lease, in order to evict, remove, terminate occupancy rights, or terminate assistance to any individual who is a tenant or lawful occupant and who engages in acts of physical violence against family members or others. Such action against the perpetrator of such physical violence may be taken without evicting, removing, terminating assistance to, or otherwise penalizing the victim of such violence who is also the tenant or a lawful occupant. Such eviction, removal, termination of occupancy rights, or termination of assistance shall be effected in accordance with the procedures prescribed by law applicable to terminations of tenancy and evictions by MHA. Leases used for all public housing operated by MHA and, at the option of Section 8 owners or managers, leases for dwelling units occupied by families assisted with Section 8 rental assistance administered by MHA, shall contain provisions setting forth the substance of this paragraph.

VII. Verification of Domestic Violence, Dating Violence or Stalking

A. *Requirement for Verification.* The law allows, but does not require, MHA or a section 8 owner or manager to verify that an incident or incidents of actual or threatened domestic violence, dating violence, or stalking claimed by a tenant or other lawful occupant is bona fide and meets the requirements of the applicable definitions set forth in this policy. Subject only to waiver as provided in paragraph VII. C., MHA shall require verification in all cases where an individual claims protection against an action involving such individual proposed to be taken by MHA. Section 8 owners or managers receiving rental assistance administered by MHA shall be required to verify, as permitted under applicable law.

Verification of a claimed incident or incidents of actual or threatened domestic violence, dating violence or stalking may be accomplished in one of the following three ways:

1. *HUD-approved form* - by providing to MHA or to the requesting Section 8 owner or manager a written certification, on a form approved by the U.S. Department of Housing and Urban Development (HUD), that the individual is a victim of domestic violence, dating violence or stalking that the incident or incidents in question are bona fide incidents of actual or threatened abuse meeting the requirements of the applicable definition(s) set forth in this policy. The incident or incidents in question must be described in reasonable detail as required in the HUD-approved form, and the completed certification must include the name of the perpetrator.

2. *Other documentation* - by providing to MHA or to the requesting Section 8 owner or manager documentation signed by an employee, agent, or volunteer of a victim service provider, an attorney, or a medical professional, from whom the victim has sought assistance in addressing the domestic violence, dating violence or stalking, or the effects of the abuse, described in such documentation. The professional providing the documentation must sign and attest under penalty of perjury (28 U.S.C. 1746) to the professional's belief that the incident or incidents in question are bona fide incidents of abuse meeting the requirements of the applicable definition(s) set forth in this policy. The victim of the incident or incidents of domestic violence, dating violence or stalking described in the documentation must also sign and attest to the documentation under penalty of perjury.

3. *Police or court record* – by providing to MHA or to the requesting Section 8 owner or

manager a Federal, State, tribal, territorial, or local police or court record describing the incident or incidents in question.

B. *Time allowed to provide verification/ failure to provide.* An individual who claims protection against adverse action based on an incident or incidents of actual or threatened domestic violence, dating violence or stalking, and who is requested by MHA, or a Section 8 owner or manager to provide verification, must provide such verification within 14 business days (*i.e.*, 14 calendar days, excluding Saturdays, Sundays, and federally-recognized holidays) after receipt of the request for verification. Failure to provide verification, in proper form within such time will result in loss of protection under VAWA and this policy against a proposed adverse action.

C. *Waiver of verification requirement.* The Executive Director of MHA, or a Section 8 owner or manager, may, with respect to any specific case, waive the above-stated requirements for verification and provide the benefits of this policy based on the victim's statement or other corroborating evidence. Such waiver may be granted in the sole discretion of the Executive Director, owner or manager. Any such waiver must be in writing. Waiver in a particular instance or instances shall not operate as precedent for, or create any right to, waiver in any other case or cases, regardless of similarity in circumstances.

VIII. Confidentiality

A. *Right of confidentiality.* All information (including the fact that an individual is a victim of domestic violence, dating violence or stalking) provided to MHA or to a Section 8 owner or manager in connection with a verification required under section VII of this policy or provided in lieu of such verification where a waiver of verification is granted, shall be retained by the receiving party in confidence and shall neither be entered in any shared database nor provided to any related entity, except where disclosure is:

1. requested or consented to by the individual in writing, or
2. required for use in a public housing eviction proceeding or in connection with termination of Section 8 assistance, as permitted in VAWA, or
3. otherwise required by applicable law.

B. *Notification of rights.* All tenants of public housing and tenants participating in the Section 8 rental assistance program administered by MHA shall be notified in writing concerning their right to confidentiality and the limits on such rights to confidentiality.

VIII. Transfer to New Residence

A. *Portability.* Notwithstanding the foregoing, a Section 8-assisted tenant will not be denied portability to a unit located in another jurisdiction (notwithstanding the term of the tenant's existing lease has not expired, or the family has not occupied the unit for 12 months) so long as the tenant has complied with all other requirements of the Section 8 program and has moved from the unit in order to protect a health or safety of an individual member of the household who is or has been the victim of domestic violence

dating violence or stalking and who reasonably believes that the tenant or other household member will be imminently threatened by harm from further violence if the individual remains in the present dwelling unit.

X. Relationships with Service Providers

It is the policy of MHA to cooperate with organizations and entities, both private and governmental that provides shelter and/or services to victims of domestic violence. If MHA staff becomes aware that an individual assisted by MHA is a victim of domestic violence, dating violence or stalking, MHA will refer the victim to such providers of shelter or services as appropriate. Notwithstanding the foregoing, this Policy does not create any legal obligation requiring MHA either to maintain a relationship with any particular provider of shelter or services to victims or domestic violence or to make a referral in any particular case. MHA's annual public housing agency plan shall describe providers of shelter or services to victims of domestic violence with which MHA has referral or other cooperative relationships.

XI. Notification

MHA shall provide written notification to applicants, tenants, and Section 8 owners and managers, concerning the rights and obligations created under VAWA relating to confidentiality, denial of assistance and, termination of tenancy or assistance.

XII. Relationship with Other Applicable Laws

Neither VAWA nor this Policy implementing it shall preempt or supersede any provision of Federal, State or local law that provides greater protection than that provided under VAWA for victims of domestic violence, dating violence or stalking.

XIII. Amendment

This policy may be amended from time to time by MHA as approved by the MHA Board of Commissioners.

Membership of the MHA Resident Advisory Board 2008

Board Member	Title	Appointment Date	Term
Anthony Brown	President	June 2007	2 years
Fannie Nickelson	Vice President	June 2007	2 years
Brenda Neal	Treasurer	June 2007	2 years
Connie Mitchell	Secretary	June 2007	2 years

Date of next board election: June 2009

Does the organization have block captains? Yes

Does the organization have an operating committee? Yes

*In an effort to increase responsibility and enhance the knowledge of the MHA Resident Advisory Board, weekly training sessions are conducted by the MHA Resident Services staff. Recruitment is an on-going effort as it relates to the RAB.

HOPE VI Budget

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

OMB Approval No. 2577-0208
(exp. 12/2004)

Part I: Summary

Public Reporting Burden for this collection of information is estimated to average 6 hours per response including the time for reviewing instructions, searching existing data sources, gathering and maintain the data needed, and completing and reviewing the collection of information. This information is necessary to provide details on the funds requested by Housing Authorities. The form displays the amount requested, broken down by budget line item, with each use explained on Part II. The requested information will be reviewed by HUD to determine if the amount requested is

reasonable and whether the required percentages of capital and supportive services funds are met. Responses to the collection are required by the appropriation under which the HOPE VI grant was funded. The information collected does not lend itself to confidentiality. HUD may not conduct or sponsor, and a person is not required to respond to collection of information unless it displays a currently valid OMB control number.

PHA Name: <u>Meridian Housing Authority</u>	HOPE VI Grant Number: <u>MS26URD0041103</u>
Devel. Name: <u>Victory Village</u>	Budget Revision Number: <u>Revision 2</u>

Line No.	Summary by Budget Line Item	Revised Overall HOPE VI Budget for All Project Phases	Previous Amount of Funds Authorized for Expenditure	Changes Requested in this Revision	HUD-Approved Total Amount of Funds Authorized for Expenditure
1	1408 Management Improvements/ Community and Supportive Services	\$ 2,197,083.00	\$ 1,034,770.00	\$ 952,278.00	
2	1410 Administration	\$ 475,000.00	\$ 238,822.00	\$ 157,665.00	
3	1430 Fees and Costs	\$ 2,737,479.00	\$ 1,355,234.00	\$ 911,110.00	
4	1440 Site Acquisition	\$ 758,000.00	\$ 145,652.00	\$ 12,348.00	
5	1450 Site Improvement	\$ 988,665.00	\$ -	\$ 988,665.00	
6	1460 Dwelling Structures	\$ 8,431,991.00	\$ 989,166.00	\$ 5,936,272.00	
7	1465 Dwelling Equipment-Nonexpendable	\$ -	\$ -	\$ -	
8	1470 Nondwelling Structures	\$ 1,457,000.00	\$ -	\$ 1,370,043.00	
9	1475 Nondwelling Equipment	\$ 47,917.00	\$ -	\$ 47,917.00	
10	1485 Demolition	\$ 137,940.00	\$ -	\$ 137,940.00	
11	1495 Relocation Costs	\$ 50,000.00	\$ -	\$ 50,000.00	
12	Total Funds Authorization (Sum Of Lines 1-11)		\$ 3,763,644.00	\$ 10,564,238.00	
13	U2000 Funds held in Reserve		\$ 13,517,431.00		
14	Amount of HOPE VI Grant (Sum Of Lines 1-13)	\$ 17,281,075.00	\$ 17,281,075.00		

Signature of PHA Executive Director

X _____ Date

HUD Certification: In approving this budget and providing assistance to a specific housing development(s), I hereby certify that the assistance will not be more than is necessary to make the assisted activity feasible after taking into account assistance from other government sources (24 CFR 12.50).

Signature of Authorized HUD Official

X _____ Date _____

HOPE VI Budget: Part II: Supporting Pages for Revision to
Overall Budget, Expenditure Allocation and/or Authorized Spending Amount

Prior Bdgt Date 1/0/1900	PHA: Meridian Housing Authority Development Name: Victory Village	Budget Revision Number Revision 2	Grant Number MS26URD0041103
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Budget Line Item Number	Description of Proposed/Approved Action Use of Additional Authorized Funds	Current Overall HOPE VI Budget (All phases)	Requested Change in Overall HOPE VI Budget (All phases)	Requested Change in Disbursed Funds (Realignment)	Current Authorized Amount (Current Spread)	Requested Change in Amount Authorized for Expenditure (Change in Spread)	Total Funds to be Authorized for Expenditure (New Spread)
1	2	3	4	5	6	7	8

1408	MANAGEMENT IMPROVEMENTS						
	MHA will hire a qualified individual to serve as a full time HOPE VI Coordinator for a period of four years. Funds requested include both salary and fringe benefits	\$ 180,429.00			\$ 51,162.00	\$ 86,813.00	\$ 137,975.00
	MHA will hire a qualified individual to serve as a full time HOPE VI Coordinator for a period of four years. Funds requested include both salary and fringe benefits JT Davis	\$ 85,571.00			\$ 85,571.00		\$ 85,571.00
	MHA will purchase vehicles on a competitive basis	\$ 50,000.00	\$ (7,810.25)		\$ 50,000.00	\$ (7,810.25)	\$ 42,189.75
	MHA will hire a qualified individual to serve as a full time Construction Inspector for a period of three years. Funds requested include both salary and fringe benefits.	\$ 152,619.00			\$ 54,586.00	\$ 73,888.00	\$ 128,474.00
	MHA will hire a qualified individual to serve as a full time Construction Inspector for a period of three years. Funds requested include both salary and fringe benefits. JT Davis	\$ 72,381.00			\$ 72,381.00		\$ 72,381.00
	MHA will hire a qualified individual to serve as a full time HOPE VI Accountant for a period of four years. Funds requested include both salary and fringe benefits.	\$ 73,935.00			\$ 24,252.00	\$ 32,286.00	\$ 56,538.00
	MHA will hire a qualified individual to serve as a full time HOPE VI Accountant for a period of four years. Funds requested include both salary and fringe benefits. JT Davis	\$ 35,065.00			\$ 35,065.00		\$ 35,065.00
	MHA will hire a qualified individual to serve as a full time HOPE VI Secretary for a period of four years. Funds requested include both salary and fringe benefits.	\$ 135,662.00			\$ 20,000.00	\$ 83,741.00	\$ 103,741.00
	MHA will hire a qualified individual to serve as a full time HOPE VI Secretary for a period of four years. Funds requested include both salary and fringe benefits. JT Davis	\$ 64,338.00			\$ 64,338.00		\$ 64,338.00
	Capital Total 1408 Cost	\$ 850,000.00	\$ (7,810.25)		\$ 457,355.00	\$ 268,917.75	
1408	Community and Supportive Services						

HOPE VI Budget: Part II: Supporting Pages for Revision to
Overall Budget, Expenditure Allocation and/or Authorized Spending Amount

Budget Line Item Number	Description of Proposed/Approved Action Use of Additional Authorized Funds	Current Overall HOPE VI Budget (All phases)	Requested Change in Overall HOPE VI Budget (All phases)	Requested Change in Disbursed Funds (Realignment)	Current Authorized Amount (Current Spread)	Requested Change in Amount Authorized for Expenditure (Change in Spread)	Total Funds to be Authorized for Expenditure (New Spread)
1	2	3	4	5	6	7	8

	MHA will, through a competitive process, purchase thirty (30) computers.	\$ 50,000.00			\$ 20,000.00	\$ 30,000.00	\$ 50,000.00
	MHA will hire a qualified individual to serve full time for a period fo 4 years. Funds requested include both salary and fringe benefits.	\$ 140,744.00			\$ 32,815.00	\$ 107,929.00	\$ 140,744.00
	MHA will hire a qualified individual to serve full time for a period fo 4 years. Funds requested include both salary and fringe benefits. JT Davis	\$ 119,256.00			\$ 119,256.00		\$ 119,256.00
	MHA will hire a qualified individual to serve as Case Manager full time for a period for 4 years. Funds requested include both salary and fringe benefits.	\$ 120,174.00			\$ 29,230.00	\$ 90,944.00	\$ 120,174.00
	MHA will hire a qualified individual to serve as Case Manager full time for a period for 4 years. Funds requested include both salary and fringe benefits. JT Davis	\$ 101,826.00			\$ 101,826.00		\$ 101,826.00
	MHA will hire a qualified individual to serve as Resident Services Coordinator full time for a period of 4 years. Funds requested include both salary and fringe benefits.	\$ 118,008.00			\$ 30,081.00	\$ 87,927.00	\$ 118,008.00
	MHA will hire a qualified individual to serve as Resident Services Coordinator full time for a period of 4 years. Funds requested include both salary and fringe benefits. JT Davis	\$ 99,992.00			\$ 99,992.00		\$ 99,992.00
	MHA will, through a competititve process, retain the services of qualified consultants to plan and implement a program of entrepreneurship.	\$ 54,132.00			\$ 50,000.00	\$ 4,132.00	\$ 54,132.00
	MHA will, through a competititve process, retain the services of qualified consultants to plan and implement a program of entrepreneurship. JT Davis	\$ 45,868.00			\$ 45,868.00		\$ 45,868.00
	Update computer software programs	\$ 30,000.00			\$ -	\$ 30,000.00	\$ 30,000.00
	Ten (10) percent of the salaries of these staff persons will be derived from HOPE VI funding. Funds requested include both 10% of salaries and benefits.	\$ 13,533.00			\$ 6,000.00	\$ 7,533.00	\$ 13,533.00
	Ten (10) percent of the salaries of these staff persons will be derived from HOPE VI funding. Funds requested include both 10% of salaries and benefits. JT Davis	\$ 11,467.00			\$ 11,467.00		\$ 11,467.00
	The estimated cost of office supplies, travel for work purposes, and office equipment for the staff involved in CSS functions associated with HOPE VI.	\$ 8,120.00	\$ 9,893.25		\$ 12,000.00	\$ 6,013.25	\$ 18,013.25

**HOPE VI Budget: Part II: Supporting Pages for Revision to
Overall Budget, Expenditure Allocation and/or Authorized Spending Amount**

Budget Line Item Number	Description of Proposed/Approved Action Use of Additional Authorized Funds	Current Overall HOPE VI Budget (All phases)	Requested Change in Overall HOPE VI Budget (All phases)	Requested Change in Disbursed Funds (Realignment)	Current Authorized Amount (Current Spread)	Requested Change in Amount Authorized for Expenditure (Change in Spread)	Total Funds to be Authorized for Expenditure (New Spread)
1	2	3	4	5	6	7	8

	The estimated cost of office supplies, travel for work purposes, and office equipment for the staff involved in CSS functions associated with HOPE VI. JT Davis	\$ 6,880.00			\$ 6,880.00		\$ 6,880.00
	Employee expenses associated with travel to HOPE VI conferences.	\$ 25,000.00			\$ 12,000.00	\$ 13,000.00	\$ 25,000.00
	The MHA will invest 5% of CSS funds, or \$400,000 to support activities beyond the grant period.	\$ 400,000.00				\$ 305,882.00	\$ 305,882.00
	Total Community and Supportive Services Costs	\$ 1,345,000.00	\$ 9,893.25		\$ 577,415.00	\$ 683,360.25	\$ 1,260,775.25
Prior Bdgt Date	Total Changes		\$ 2,083.00	\$ -		\$ 952,278.00	
1/0/1900	Previous Approved Budget Totals	\$ 2,195,000.00	\$ 2,195,000.00	\$ 392,126.00	\$ 1,034,770.00	1034770	\$ 1,034,770.00
	NEW TOTALS FOR HUD APPROVAL		\$ 2,197,083.00	\$ 392,126.00		\$ 1,987,048.00	\$ 1,987,048.00
	Percentage of BLI Budget			18%	47%	90%	90%

1410	ADMINISTRATION						
	Ten (10) percent to thirty (30) percent of the salaries of these staff persons will be derived from HOPE VI funding. Funds requested include both 10% to 30% of salaries and benefits.	\$ 274,380.00			\$ 60,000.00	\$ 149,820.00	\$ 209,820.00
	Ten (10) percent to thirty (30) percent of the salaries of these staff persons will be derived from HOPE VI funding. Funds requested include both 10% to 30% of salaries and benefits. JT Davis	\$ 125,620.00			\$ 125,620.00		\$ 125,620.00
	The estimated cost of office supplies, telephone, gas and maintenance of vehicles, and office equipment for the staff involved in management, improvement and administrative functions associated with HOPE VI.	\$ 34,298.00			\$ 25,000.00	\$ 1,228.00	\$ 26,228.00
	The estimated cost of office supplies, telephone, gas and maintenance of vehicles, and office equipment for the staff involved in management, improvement and administrative functions associated with HOPE VI. JT Davis	\$ 15,702.00			\$ 15,702.00		\$ 15,702.00
	Employee expenses associated with travel to HOPE VI conferences.	\$ 25,000.00			\$ 12,500.00	\$ 6,617.00	\$ 19,117.00
							\$ -
							\$ -
Prior Bdgt	Total Changes		\$ -	\$ -		\$ 157,665.00	

**HOPE VI Budget: Part II: Supporting Pages for Revision to
Overall Budget, Expenditure Allocation and/or Authorized Spending Amount**

Budget Line Item Number	Description of Proposed/Approved Action Use of Additional Authorized Funds	Current Overall HOPE VI Budget (All phases)	Requested Change in Overall HOPE VI Budget (All phases)	Requested Change in Disbursed Funds (Realignment)	Current Authorized Amount (Current Spread)	Requested Change in Amount Authorized for Expenditure (Change in Spread)	Total Funds to be Authorized for Expenditure (New Spread)
1	2	3	4	5	6	7	8

Date							\$
1/0/1900	Previous Approved Budget Totals	\$ 475,000.00	\$ 475,000.00	\$ 97,500.00	\$ 238,822.00	238822	\$ 238,822.00
NEW TOTALS FOR HUD APPROVAL			\$ 475,000.00	\$ 97,500.00		\$ 396,487.00	\$ 396,487.00
Percentage of BLI Budget				21%	50%	83%	83%

1430	FEES AND COSTS						
	MHA will retain contractors for review and consultant purposes as well as delivering financial documents for HUD approval	\$ 665,388.00	\$ (138,529.00)		\$ 300,000.00	\$ 102,893.00	\$ 402,893.00
	MHA will retain contractors for review and consultant purposes as well as delivering financial documents for HUD approval JT Davis	\$ 84,612.00	\$ 138,529.00		\$ 84,612.00	\$ 138,529.00	\$ 223,141.00
	Developer and its Architects were selected on a competitive basis. Developer will select additional consultants, if needed on a competitive basis.	\$ 1,031,715.00	\$ 459,054.00		\$ 822,093.00	\$ 321,507.00	\$ 1,143,600.00
	Developer and its Architects were selected on a competitive basis. Developer will select additional consultants, if needed on a competitive basis. JT Davis	\$ 131,196.00	\$ 300,514.00		\$ 131,196.00	\$ 300,514.00	\$ 431,710.00
	MHA will enter into an inter-governemtal agreement with Mississippi State University to evaluate the impact of HOPE VI on the community.	\$ 57,667.00	\$ 7,333.00		\$ 10,000.00	\$ 55,000.00	\$ 65,000.00
	MHA will enter into an inter-governemtal agreement with Mississippi State University to evaluate the impact of HOPE VI on the community. JT Davis	\$ 7,333.00	\$ (7,333.00)		\$ 7,333.00	\$ (7,333.00)	\$ -
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
Prior Bdgt Date	Total Changes		\$ 759,568.00	\$ -		\$ 911,110.00	\$ 911,110.00
1/0/1900	Previous Approved Budget Totals	\$ 1,977,911.00	\$ 1,977,911.00	\$ 1,096,246.87	\$ 1,355,234.00	1355234	\$ 1,355,234.00
NEW TOTALS FOR HUD APPROVAL			\$ 2,737,479.00	\$ 1,096,246.87		\$ 2,266,344.00	\$ 2,266,344.00
Percentage of BLI Budget				40%	50%	83%	83%

HOPE VI Budget: Part II: Supporting Pages for Revision to
Overall Budget, Expenditure Allocation and/or Authorized Spending Amount

Budget Line Item Number	Description of Proposed/Approved Action Use of Additional Authorized Funds	Current Overall HOPE VI Budget (All phases)	Requested Change in Overall HOPE VI Budget (All phases)	Requested Change in Disbursed Funds (Realignment)	Current Authorized Amount (Current Spread)	Requested Change in Amount Authorized for Expenditure (Change in Spread)	Total Funds to be Authorized for Expenditure (New Spread)
1	2	3	4	5	6	7	8

1440	SITE ACQUISITION						
	Includes acquisition and long-term subsidy of 12 off site newly constructed homes in non-impacted area and church property next to Victory Village.	\$ 454,348.00	\$ (10,348.00)		\$ -		\$ -
	MHA Maintenance Facility JT Davis	\$ 145,652.00	\$ (57,652.00)		\$ 145,652.00	\$ (57,652.00)	\$ 88,000.00
	Includes acquisition and long-term subsidy of 8 off site newly constructed or renovated homes in impacted area		\$ 156,000.00				\$ -
	Includes acquisition and long term subsidy of church owned property and flop house.		\$ 70,000.00			\$ 70,000.00	\$ 70,000.00
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
Prior Bdgt Date	Total Changes		\$ 158,000.00	\$ -		\$ 12,348.00	
1/0/1900	Previous Approved Budget Totals	\$ 600,000.00	\$ 600,000.00	\$ -	\$ 145,652.00	145,652.00	\$ 145,652.00
	NEW TOTALS FOR HUD APPROVAL		\$ 758,000.00	\$ -		\$ 158,000.00	\$ 158,000.00
	Percentage of BLI Budget			%	19%	21%	21%

1450	SITE IMPROVEMENTS						
	Cost of site improvements not being paid through private and public donations. Contractor will be selected by Developer through competitive process.	\$ 1,579,426.00	\$ (590,761.00)		\$ -	\$ 988,665.00	\$ 988,665.00
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
Prior Bdgt	Total Changes		\$ (590,761.00)	\$ -		\$ 988,665.00	

HOPE VI Budget: Part II: Supporting Pages for Revision to
Overall Budget, Expenditure Allocation and/or Authorized Spending Amount

Budget Line Item Number	Description of Proposed/Approved Action Use of Additional Authorized Funds	Current Overall HOPE VI Budget (All phases)	Requested Change in Overall HOPE VI Budget (All phases)	Requested Change in Disbursed Funds (Realignment)	Current Authorized Amount (Current Spread)	Requested Change in Amount Authorized for Expenditure (Change in Spread)	Total Funds to be Authorized for Expenditure (New Spread)
1	2	3	4	5	6	7	8

Date							\$ 988,665.00
1/0/1900	Previous Approved Budget Totals	\$ 1,579,426.00	\$ 1,579,426.00	\$ -	\$ -		\$ -
NEW TOTALS FOR HUD APPROVAL			\$ 988,665.00	\$ -		\$ 988,665.00	\$ 988,665.00
Percentage of BLI Budget				%	%	%	%

1460	DWELLING STRUCTURES						
	Developer will select General Contractor to complete on-site construction on a competitive basis. Costs are apportioned on basis of replacement units to all units.	\$ 7,844,842.00	\$ 29,693.00		\$ -	\$ 6,367,982.00	\$ 6,367,982.00
	Developer will select General Contractor to complete on-site construction on a competitive basis. Costs are apportioned on basis of replacement units to all units. (J.T. Davis)	\$ 989,166.00	\$ (431,710.00)		\$ 989,166.00	\$ (431,710.00)	\$ 557,456.00
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
Prior Bdg Date	Total Changes		\$ (402,017.00)	\$ -		\$ 5,936,272.00	
1/0/1900	Previous Approved Budget Totals	\$ 8,834,008.00	\$ 8,834,008.00	\$ -	\$ 989,166.00	989,166.00	\$ 989,166.00
NEW TOTALS FOR HUD APPROVAL			\$ 8,431,991.00	\$ -		\$ 6,925,438.00	\$ 6,925,438.00
Percentage of BLI Budget				%	12%	82%	82%

1465	DWELLING EQUIPMENT - NONEXPENDABLE						
					\$ -	\$ -	\$ -
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -

HOPE VI Budget: Part II: Supporting Pages for Revision to
Overall Budget, Expenditure Allocation and/or Authorized Spending Amount

Budget Line Item Number	Description of Proposed/Approved Action Use of Additional Authorized Funds	Current Overall HOPE VI Budget (All phases)	Requested Change in Overall HOPE VI Budget (All phases)	Requested Change in Disbursed Funds (Realignment)	Current Authorized Amount (Current Spread)	Requested Change in Amount Authorized for Expenditure (Change in Spread)	Total Funds to be Authorized for Expenditure (New Spread)
1	2	3	4	5	6	7	8

							\$ -
							\$ -
							\$ -
Prior Bdgt Date	Total Changes		\$ -	\$ -		\$ -	0
1/0/1900	Previous Approved Budget Totals	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
NEW TOTALS FOR HUD APPROVAL			\$ -	\$ -		\$ -	\$ -
Percentage of BLI Budget				%	%	%	%

1470	NONDWELLING STRUCTURES						
	MHA will retain services of a contractor on a competitive basis to construct new facilities on PHA property.	\$ 940,000.00	\$ (185,652.00)			\$ 667,391.00	\$ 667,391.00
	MHA will retain services of a contractor on a competitive basis to construct new Maintenance facility on PHA property . JT Davis		\$ 57,652.00			\$ 57,652.00	\$ 57,652.00
	Developer will retain services of a contractor to construct a new community building		\$ 645,000.00			\$ 645,000.00	\$ 645,000.00
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
Prior Bdgt Date	Total Changes		\$ 517,000.00	\$ -		\$ 1,370,043.00	
1/0/1900	Previous Approved Budget Totals	\$ 940,000.00	\$ 940,000.00	\$ -	\$ -		\$ 1,370,043.00
NEW TOTALS FOR HUD APPROVAL			\$ 1,457,000.00	\$ -		\$ 1,370,043.00	\$ 1,370,043.00
Percentage of BLI Budget				%	%	%	%

1475	NONDWELLING EQUIPMENT						
	MHA will purchase vehicles on a competitive basis.	\$ 50,000.00	\$ (2,083.00)		\$ -	\$ 47,917.00	\$ 47,917.00
							\$ -
							\$ -

**HOPE VI Budget: Part II: Supporting Pages for Revision to
Overall Budget, Expenditure Allocation and/or Authorized Spending Amount**

Budget Line Item Number	Description of Proposed/Approved Action Use of Additional Authorized Funds	Current Overall HOPE VI Budget (All phases)	Requested Change in Overall HOPE VI Budget (All phases)	Requested Change in Disbursed Funds (Realignment)	Current Authorized Amount (Current Spread)	Requested Change in Amount Authorized for Expenditure (Change in Spread)	Total Funds to be Authorized for Expenditure (New Spread)
1	2	3	4	5	6	7	8

							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
Prior Bdg Date	Total Changes		\$ (2,083.00)	\$ -		\$ 47,917.00	
							\$ 47,917.00
1/0/1900	Previous Approved Budget Totals	\$ 50,000.00	\$ 50,000.00	\$ -	\$ -		\$ -
NEW TOTALS FOR HUD APPROVAL			\$ 47,917.00	\$ -		\$ 47,917.00	\$ 47,917.00
Percentage of BLI Budget				%	%		%

1485	DEMOLITION						
	Cost of demolition of maintenance building. Cost of on-site demolition was covered by a 2001 HOPE VI Demolition Grant.	\$ 579,730.00	\$ (441,790.00)			\$ 137,940.00	\$ 137,940.00
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
Prior Bdg Date	Total Changes		\$ (441,790.00)	\$ -		\$ 137,940.00	
							\$ 137,940.00
1/0/1900	Previous Approved Budget Totals	\$ 579,730.00	\$ 579,730.00	\$ -	\$ -		\$ -
NEW TOTALS FOR HUD APPROVAL			\$ 137,940.00	\$ -		\$ 137,940.00	\$ 137,940.00
Percentage of BLI Budget				%	%		%

1495	RELOCATION COSTS						
	Relocation Benefits will be needed to assist families in moving to Victory Village.	\$ 50,000.00				\$ 50,000.00	\$ 50,000.00

HOPE VI Budget: Part II: Supporting Pages for Revision to
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Budget Line Item Number	Description of Proposed/Approved Action Use of Additional Authorized Funds	Current Overall HOPE VI Budget (All phases)	Requested Change in Overall HOPE VI Budget (All phases)	Requested Change in Disbursed Funds (Realignment)	Current Authorized Amount (Current Spread)	Requested Change in Amount Authorized for Expenditure (Change in Spread)	Total Funds to be Authorized for Expenditure (New Spread)
1	2	3	4	5	6	7	8

							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
							\$ -
Prior Bdgt Date	Total Changes		\$ -	\$ -		\$ 50,000.00	
							\$ 50,000.00
1/0/1900	Previous Approved Budget Totals	\$ 50,000.00	\$ 50,000.00	\$ -	\$ -		\$ -
	NEW TOTALS FOR HUD APPROVAL		\$ 50,000.00	\$ -		\$ 50,000.00	\$ 50,000.00
	Percentage of BLI Budget			%	%		%

	Total Changes	\$ -	\$ -		\$ 10,564,238.00	\$ 10,564,238.00
	Previous Approved Budget Totals	\$ 17,281,075.00	\$ 1,585,872.87	\$ 3,763,644.00	3,763,644.00	\$ 3,763,644.00
	NEW BLI TOTAL	\$ 17,281,075.00	\$ 1,585,872.87		\$ 14,327,882.00	\$ 14,327,882.00

The Housing Authority of the City of
Meridian

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Meridian, MS 39301
Phone: 601-693-4285
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Proposed Allocation Plan

Elderly Designation for Twenty Units at the Redeveloped Victory Village HOPE VI Project

Submission Date

April 24, 2007

Revised Submission

August 3, 2007

Derwin K. Jackson, PHM
Executive Director

Section 1 JUSTIFICATION FOR DESIGNATION

The Housing Authority of the City of Meridian plans to designate twenty units of the newly redeveloped HOPE VI (Victory Village) site as elderly only housing. This action is the result of several meetings with resident groups, during which it was expressed that the elderly residents prefer to live in an area that provides them with minimum exposure to younger more active residents. To accommodate the desires of this segment of the MHA resident population research was begun to determine the feasibility of designating twenty units in the redeveloped site as elderly only.

The Mississippi Consolidated Plan contains data that supports the designation of these units; given the level of statewide poverty and the cost of housing it would seem prudent to designate these units as elderly only. The 2000 Census for Mississippi reported that there were 548,079 people living in poverty that is a poverty rate of 19.9 percent. The number of elderly people (65+) total 61,239, with a total of 1,106 reported from CHAS data living in Meridian. Currently the Low-income waiting list has 7 elderly waiting for 1 and 2 bedrooms. The reassignment list for Victory Village has 27 residents 65+ who are eligible to return to the site. MHA has a total elderly and disabled family population of 471 with an elderly population (65+) of 151. According to the U.S. Census 2006 data updated for the CHAS Data Report, Meridian has a total elderly renter's population of 1,106; Lauderdale County has a total elderly population of 6,895, which represent 38% of the elderly population of the State of Mississippi (18,103). There are 709 elderly persons with income less than or equal to 50% of MFI, 488 elderly families with household income less than or equal to 30% of MFI, with a total of 878 elderly person living in Lauderdale County identified as living in poverty. The vacancy rate for Meridian is reported at 10.5%

The MHA Allocation Plan is consistent with the Mississippi Consolidated Plan in that it is implementing the spirit and intent of the State's Plan regarding designated housing: "Title VI of the Housing and Community Development Act of 1992 establishes the process PHAs must follow to designate housing as senior-only, disabled-only, or senior and disabled only. The legislation deregulates housing authorities and streamlines the process by which authorities may designate housing for specific populations.

There is widespread agreement by senior citizens, the housing industry, and Congress that, in buildings designated for elderly families, PHAs must be allowed to limit occupancy only to senior citizens. Since 1988, when the Fair Housing Act Amendments expanded the definition of "disabled" to include former abusers of drugs and alcohol, young substance abusers have been mixed-in with frail seniors in public and assisted housing. According to the American Association of Retired Persons(AARP), mixing young persons (even though classified as mentally disabled) in apartment complexes with single women who are, on average, 76 years old, has dramatically changed a strong, supportive atmosphere into one filled with disruption and fear." (*Mississippi Analysis of Impediments to Fair Housing, Prepared in Support of Mississippi's Consolidated Plan* prepared by: Western Economic Services, LLC, Portland, OR.)

WHY THE PROJECTS WERE SELECTED FOR DESIGNATION

Designation of the Elderly Cottages housing for elderly only residents is being pursued in response to repeated – and increasing – complaints from residents as conveyed to the Meridian Housing Authority and its Board of Directors. Authority staff feels these complaints, and public perception about the quality of life in public housing, is causing many low and moderate income elderly persons to seek housing in developments owned and operated by other agencies and private entities (i.e., Stevenson Homes, College Park Apartments and Deville Manor Apartments), many of the developments are properties developed specifically for the elderly under Section 202. This trend of elderly seeking such separate housing over mixed population units is evidenced in the dramatically increase in numbers of elderly persons seeking units in MHA elderly designated scattered units located at 8th and 9th Avenues.

Data compiled for the Mississippi State's Consolidated Plan indicates there is a strong need for elderly housing. According to the 2000 U.S. Census, Meridian had a population of 49,523 persons. The number of residents age 60 and over totaled 10,307 in 2000. This group represented over 20 percent of the population which is the same elderly percentage as Meridian reported even back to 1990 although the total number of persons in Meridian has dropped during that time. In addition, demographic data from the Mississippi Analysis of Impediments to Fair Housing a report prepared for the Mississippi Development Authority indicates that slightly more than half of Meridian's elderly live in extremely low, very low, low or moderate income households.

There is a clear need for affordable elderly housing in Meridian given these statistics. Unfortunately, public perception about the quality of life in the mixed population housing is apparently disqualifying the Victory Village site as a viable housing option in the minds of many low and moderate income elderly persons. The Authority's waiting list currently includes 20 elderly applicants and 443 non-elderly applicants as of March 1, 2006.

Discussions with current MHA elderly residents indicates the perception of problems caused by non-elderly disabled residents and their visitors are intimidating potential applicants. The Authority administrative staff repeatedly receives complaints about tensions between the mixed populations. During many of the Resident Associations and RAB meetings group discussions have supported individual complaints about elderly residents no longer feeling safe and secure in their homes in the mixed population developments and want to have non-elderly residents moved to other sites.

Despite the clear housing needs of low and moderate income elderly persons, however, this Authority recognizes the need to also assist non-elderly disabled persons. While the State's consolidated plan identifies the elderly as the largest special needs group in the State, the plan also makes many provisions for assisting non-homeless persons with developmental disabilities, severe mental illness, physical disabilities and persons recovering from drug and/or alcohol abuse.

Many points in MHA's strategic plan call for promoting independence for disabled

persons. Other points in the plan are structured to help disabled residents attain self-sufficiency and encourage diversity among the Authority's general populations. Designation of the Victory Village Cottages housing for elderly only residents would actually help the Authority achieve both these goals.

This allocation plan establishes that all non-elderly disabled residents who seek public housing units will, after following appropriate procedures outlined in the Authority's Section 8 Administrative Plan and Admissions & Continued Occupancy Policy, receive a preference to return to the mixed population developments. In effect, the Authority intends to help establish the non-elderly disabled residents in scattered sites across the City and, through portability of vouchers, Lauderdale County. This will clearly work towards the integration goal identified in State's consolidated plan while encouraging the creation of more decent, safe and modified units within the City and Lauderdale County.

Section 2 Project Description

IDENTIFY THE PROJECTS TO BE DESIGNATED

MS004-05, 07, and 09 Victory Village

Located at 4500 45th Avenue, Meridian, MS, this development includes 34 one-bedroom apartments, of which 4 were Handicapped accessible units. There were a total of 54 two bedroom units, 41 three bedroom units, 16 four bedroom units and 3 five bedroom units; thus providing a total of 148 mixed population housing units. There were no units designated for elderly residents.

IDENTIFY THE TYPE OF DESIGNATION TO BE MADE

MS004-05, 07, and 09 Victory Village Elderly Cottages

Victory Village Elderly Cottages is to be designated Housing for Elderly Families as defined in 24 CFR Part 945. As per Section 945.105, an elderly family means a family whose head, spouse or sole member is a person who is at least 62 years of age. The term "elderly family" includes an elderly person, two or more elderly persons living together, and one or more elderly persons living with one or more persons who are determined to be essential to the care or well-being of the elderly person or persons. An elderly family may include elderly persons with disabilities and other family members who are not elderly.

IDENTIFY THE UNITS TO BE DESIGNATED

MS004-05, 07, and 09 Victory Village Elderly Cottages

Twenty (20) units in the HOPE VI Victory Village site will be designated as Elderly Cottages Housing for Elderly families only, 10 units will be modified for residents with wheelchairs and 3 units modified for residents with hearing impairments. Units 102, 202, 302, 411, 511, 611, 711, 811, 911 and 1022 will be fully wheelchair accessible and will be available to elderly families who require accessible units. Units 620, 622 and 716 will be modified to accommodate those with hearing impairments and will be available to elderly families who require such modifications. The designated units will be situated in a grouping set off from the non-designated units; however, all of the redeveloped site amenities and services will be accessible to the residents of these designated units.

Type of Tenants:

The designated units will be available to residents meeting the HUD Elderly Family definition of a family whose head, spouse or sole member is a person who is at least 62 years of age. It may include two or more persons who are at least 62 years of age living together or one or more persons who are at least 62 years of age living with one or more live-in aides. A Live-in Aide is defined as a person who resides with one or more elderly persons or near-elderly persons, or persons with disabilities who:

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

Children are not to be excluded from the definition of elderly family, since many elderly families consist of grandparents with custody of grandchildren. Elderly families with children will not be considered for these designated units; but will be housed in other non-designated MHA units at the redeveloped site.

Near Elderly families are only eligible for admission to the units designated for the Elderly Families when MHA has determined that there are an insufficient number of elderly families to occupy the designated units as established in the Allocation Plan. Near-elderly family is defined as a family whose head, spouse or sole member is at least 50 years of age but below the age of 62; or two or more persons who are at least 50 years of age but below the age of 62 living together or one or more persons who are at least 50 years of age but below the age of 62 living with one or more live-in aides.

Supportive Services Provisions:

Residents living in designated units will have a full array of supportive services available to them, which will include Service Coordinator(s), Case Manager(s), and Community Outreach staff. These staff will ensure that needed and required services are made available and monitored for the elderly resident. The services available to residents of the designated units will be, but not limited to the following:

- 1 Coordination, referral to, and delivery of meal services adequate to meet nutritional needs(i.e., not related to entertainment activities);
 - 2 Coordination, referral to, and delivery of transportation services to assist residents with transportation to medical appointments, shopping and social activities;
 - 3 Coordination, set-up and referral to assistance with daily activities to facilitate aging in place and enhanced quality of life issues;
 - 4 Coordination, set-up and referral to housekeeping assistance;
 - 5 Coordination, referral to, and delivery of wellness programs including but not limited to health and nutrition programs, preventive health education, referral to rehabilitation services, structured programs to build social support, services for the elderly who are disabled;
 - 6 Coordination, set-up and referral to personal emergency response;
 - 7 Coordination, referral, and delivery of job training and employment opportunities
- Section 3

How the waiting list will be maintained:

The conventional public housing waiting list will be maintained for elderly, near-elderly and non-elderly disabled applicants in accordance with applicable HUD regulations and the Meridian Housing Authority's policies. An individual's rank on the waiting list is currently determined by the time and date of his or her application and local preference. Those who submitted applications first will be screened and, if eligible, offered a unit first.

As elderly and near-elderly applicants reach the top of the waiting list, Authority staff

will initiate screening procedures and, if appropriate, place the applicant as soon as possible in an available unit at the mixed population housing.

As non-elderly disabled applicants who need units modified for wheelchair accessibility or hearing impairments reach the top of the waiting list, Authority staff will initiate screening procedures and, if appropriate, place the applicant as soon as possible in an available modified unit at the mixed population housing, not to include the designated Elderly family units.

As non-elderly disabled applicants who do not need, or want, modified units reach the top of the public housing waiting list; Authority staff will initiate eligibility determination and, if appropriate, provide a Section 8 voucher to the applicant as soon as such assistance is available. This procedure is the same as the waiting list procedures outlined in the approved MHA Admissions and Occupancy Plan.

How Dwelling Units Will Be Assigned:

Eligible elderly applicants will be offered units in the elderly family designated housing units. If a unit remains vacant for 30 or more days and/or no eligible elderly applicant is available to fill the unit, the unit will be offered to an eligible near-elderly applicant. If an elderly or near-elderly applicant refuses an offered unit, the applicant's name will be placed at the bottom of the waiting list. The Authority will maintain a record of the units offered and each rejection or acceptance.

Eligible non-elderly disabled applicants who need units modified for wheelchair accessibility or hearing impairments will be offered modified units in the mixed population housing. If a modified unit in either project remains vacant for 30 or more days and/or no eligible non-elderly disabled applicants are available to fill the modified unit, the unit will be offered to an eligible near-elderly or elderly disabled applicant who requires a modified unit. If there is no non-elderly disabled, near-elderly disabled or elderly disabled applicant who needs a modified unit, the unit will be offered to first an eligible elderly applicant and then an eligible near-elderly applicant. The Authority will maintain a record of the units offered and each rejection or acceptance.

Eligible non-elderly applicants who do not need, or want, a HOPE VI unit modified for wheelchair accessibility or hearing impairments will be given a preference to receive a Section 8 voucher as soon as such assistance is available. The voucher will be awarded for the appropriate size unit based on the Authority's occupancy standards.

HOW WILL RECORDS BE MAINTAINED TO DOCUMENT THE EFFECT ON ALL FAMILIES WHO WOULD HAVE RESIDED IN THE DESIGNATED PROJECT IF IT HAD NOT BEEN DESIGNATED

Each applicant that applies for Section 8 or public housing prior to HUD approval of the designation plan will have their application form marked with the date, time and status of application prior to the project designation by action of the Authority's Board of Directors. The waiting list for both Section 8 and public housing will be printed before

and after designation. These records will be maintained on file in the housing authority office and reviewed every two years in conjunction with the submission of the revised allocation plan.

Project Design & Related Facilities:

All of the newly constructed designated housing units and common area buildings have been built to conform to the requirements as stated in the Section 202 (d) (8) of the Housing Act of 1959, Section 504 of the Rehabilitation Act of 1973, and the most current Americans with Disabilities Act regulations.

Non-designated Group Service Availability:

Services that are available to the designated elderly residents are available to all non-designated residents. All returning residents to the HOPE VI site will be given an opportunity to enroll in case management and participate in all of the previously mentioned services as they apply to individual families needs.

Section 3 STRATEGY FOR ADDRESSING THE CURRENT AND FUTURE HOUSING NEEDS OF FAMILIES IN THE AUTHORITY'S JURISDICTION

IDENTIFY THE HOUSING RESOURCES, INCLUDING MIXED POPULATION PROJECTS, AVAILABLE TO THESE FAMILIES

The HOPE VI Victory Village site with 148 units previously held no designated elderly housing. With this designation, it will become transformed into a 130 unit mixed-income

community, with 20 one bedroom “cottages” designated as elderly occupancy housing. The undesignated group will have available housing as follows; a total of 20 three bedroom single family detached homes for sale to PHA eligible residents; 54 two story, 2 and 3 bedroom semi-detached mixed income rental duplexes; and 54, 2 and 3 bedroom semi-detached mixed income rental triplexes. It is anticipated that elderly residents will be relocated from other non-designated elderly units and into the elderly designated units in the HOPE VI mixed population housing after designation.

The supply of housing for the non-designated group will not be diminished. Based on current occupancy, shown in the table below, relocated elderly residents will be afforded an opportunity to return to the elderly housing units without creating any additional hardship on non-designated elderly residents. This trend in housing need is projected to remain stable during the five year term of the Allocation Plan.

Current Occupancy

Development	Elderly Occupants	Non-elderly Occupants
Western Gardens	32	490
Eastern Gardens	61	446
Sowashee Courts	35	220
Highway Village	27	169
George Reece Courts	28	152
Magnolia Courts	28	104
Frank Berry Courts	37	192
Scattered Sites A,B,C, D, F	66	142
Mt. View	22	146
Oakland Heights	72	24

DESCRIBE STEPS PLANNED TO RESPOND TO ANY NEED FOR ACCESSIBLE UNITS THAT WILL NO LONGER BE AVAILABLE FOR APPLICANTS WHO NEED THEM

All accessible units will continue to be made available to non-elderly disabled persons. These units will not be designated.

IF A PROJECT IS BEING DESIGNATED FOR ELDERLY FAMILIES, DESCRIBE STEPS PLANNED TO HELP NON-ELDERLY DISABLED FAMILIES ACCESS SUPPORTIVE SERVICES

A resident services coordinator currently serves all residents of the mixed population housing. This coordinator was placed to help elderly and non-elderly disabled residents maintain independent living. Under the allocation plan, the coordinator will continue serving residents of the HOPE VI units. The coordinator also will help non-elderly

disabled residents of the HOPE VI site to contact local advocacy groups and support agencies for supportive services.

In addition, the Authority intends to seek support for the allocation plan from the numerous advocacy groups and support agencies located in Meridian and Lauderdale County. These groups include, but are not limited to, Multi-County Community Service Agency, Inc., The Mississippi Office of Vocational Rehabilitation, Wesley House Social Services, Alliance Health Center, and Weems Community Mental Health Center, Mississippi Department of Human Services, Greater Meridian Health Clinic, and the Salvation Army. Many of these agencies, as well as other advocacy groups and support groups not listed here, provide caseworkers to help individuals continue living independently.

IF A PROJECT IS BEING DESIGNATED FOR ELDERLY FAMILIES, IDENTIFY ADDITIONAL HOUSING RESOURCES SUFFICIENT TO PROVIDE ASSISTANCE TO THE NUMBER OF NON-ELDERLY DISABLED FAMILIES WHO WOULD HAVE BEEN HOUSED IF THE ALLOCATION PLAN WAS NOT IMPLEMENTED

As noted above, the HOPE VI site was not designated for elderly families will remain a mixed income housing site with elderly and non-elderly families housing. This will meet all demand for housing by non-elderly disabled families who would have been housed if the allocation plan was not implemented.

EXPLAIN HOW THE AUTHORITY PLANS TO SECURE ADDITIONAL HOUSING RESOURCES TO ACCOMMODATE THE NON-ELDERLY DISABLED FAMILIES WHO MAY HAVE BEEN HOUSED IF THE ALLOCATION PLAN WAS NOT IMPLEMENTED

It is anticipated that the HOPE VI and J.T. Davis sites will meet all demand. If, however, more housing is needed, the Authority will make referrals to area Section 202 and Section 811 developments, which cater to elderly populations.

DESCRIBE INCENTIVES THE AUTHORITY INTENDS TO OFFER TO ELDERLY AND NEAR-ELDERLY FAMILIES TO ACHIEVE VOLUNTARY PLACEMENT IN THE DESIGNATED PROJECTS

There were 34 one bedroom units at the former Victory Village mixed population housing site, which will be converted into 20 one bedroom elderly designated housing units. This designation and location was suggested at the request of elderly residents during several of the public meeting to discuss design of the HOPE VI site, which it was felt would make the HOPE VI site more attractive to elderly applicants.

Many elderly applicants would prefer to be placed in one bedroom units. Many eligible elderly applicants, however, have been placed in efficiency units at the 8th and 9th Ave.

sites because these sites have more efficiency units available and are designated as elderly.

Once the allocation plan is adopted, the Authority also intends to initiate a strong marketing campaign to make elderly and near-elderly residents of Meridian aware of the elderly only designation at the HOPE VI mixed population housing site. The marketing effort will be aimed at convincing elderly applicants that the HOPE VI Victory Village site is a safe and viable housing alternative. This effort should help the Authority halt, and eventually reverse, declines in the number of elderly applying for public housing.

DESCRIBE INCENTIVES THE AUTHORITY INTENDS TO OFFER NON-ELDERLY DISABLED FAMILIES TO ACHIEVE VOLUNTARY TRANSFERS FROM THE DESIGNATED PROJECTS

There are no residents currently living in the HOPE VI units as the site is under development. This plan will not require non-elderly disabled residents living in the mixed population housing to move if the 20 units are designated elderly only

Section 4 IDENTIFICATION OF GROUPS AND PEOPLE CONSULTED ABOUT PLAN

RESULTS OF A PUBLIC HEARINGS HELD WITH ALL FORMER RESIDENTS OF THE PROJECT TO BE DESIGNATED

All relocated residents of the Victory Village site received notice of public hearing and project update meeting during the period of June 2002 to October 2006. These hearings

and meetings were designed to measure resident opinions about the quality of life a Victory Village. Although these hearing addressed many issues, there were key questions raised by residents as to the need for designated elderly only units for elderly residents.

MHA Case Managers and Resident Advisory Board representatives met in regular meeting during the aforementioned period to discuss the need for designated elderly housing at the site and their concerns were presented to MHA administrative staff for review.

Some of the concerns raised were as a response to these meetings in which residents indicated that the Victory Village Cottages should be designated for elderly only and that non-elderly disabled residents should be removed from the elderly designated units. Some of these concerns directly referenced negative attitudes and criticism directed toward non-elderly disabled residents by elderly or near-elderly residents.

Some resident statements included:

- 1 The age level of residents is going down.
- 2 The age level, isn't this a senior/handicapped site?
- 3 Too many younger people.
- 4 Young people have different interests.
- 5 Keep younger residents out.
- 6 Letting younger ones move in.
- 7 The younger ones playing games.
- 8 Getting young people in.
- 9 No teenagers.
- 10 These sites were built for the elderly.
- 11 Tenants ages.
- 12 Too many young people moving in.
- 13 The age of the tenants living here.

ADDITIONAL CONSULTATIONS DONE TO PREPARE THE ALLOCATION PLAN

Originally, public housing authorities developing allocation plans were required to consult with area service providers and local advocacy groups, and hold a series of public hearings. This requirement was changed, however, with the amendments included in the Housing Opportunity Program Extension Act of 1996. The amendments were structured to streamline the process of developing and receiving approval for such allocation plans. Given this change, the Meridian Housing Authority does not plan to hold additional formal public hearings with regards to our allocation plan for the Victory Village Elderly Cottages. The Authority does plan, however, to make area service providers and support agencies aware of our intent so that goals and policies outlined in the allocation plan are understood by the general public and attained by the Authority.

Section 5 PROFILES OF DEVELOPMENTS IN PRE-DESIGNATION STATE

Statistical information in the allocation plan was compiled by Authority staff the week of November 7, 2005, unless otherwise noted. All the information was accurate to the staff's knowledge as of Monday, October 31, 2005.

TOTAL NUMBER OF RESIDENTS OCCUPYING THE PROJECT

MS00400 5, 7, 9 Mixed population housing 0 (all residents had been relocated)

Number of residents for whom the development is to be designated, i.e. elderly

MS00400 5, 7, 9 Mixed population housing 20 (elderly families)

Number of residents who are not members of the group for whom the development is to be designated, i.e. non-elderly disabled

MS004 -05, 7, 9 mixed population housing 253 (110 units with 2.3 persons per unit)

ESTIMATE THE TOTAL NUMBER OF ELDERLY AND NON-ELDERLY DISABLED FAMILIES WHO ARE POTENTIAL TENANTS OF MS00400 5,7, 9 Mixed POPULATION HOUSING BASED ON INFORMATION FROM THE TENANT SELECTION WAITING LIST

Elderly 20
Non-elderly disabled 43

ESTIMATE THE NUMBER OF POTENTIAL TENANTS WHO WILL NEED WHEELCHAIR ACCESSIBLE UNITS BASED ON THE WAITING LIST

Elderly 2
Non-elderly disabled 5

ESTIMATE THE NUMBER OF UNITS IN THE PROJECT EXPECTED TO BECOME AVAILABLE FOR OCCUPANCY FOR A TWO YEAR PERIOD FOLLOWING SUBMISSION OF THIS ALLOCATION PLAN TO HUD

MS004 -05, 07, 09, Mixed population housing 24

ESTIMATE THE AVERAGE LENGTH OF TIME ELDERLY AND NON-ELDERLY DISABLED FAMILIES CURRENTLY HAVE TO WAIT FOR A DWELLING UNIT

An applicant moving into an efficiency unit in the mixed population housing between July 2005 and June 2006 waited approximately 6 months for placement. An applicant moving into a one bedroom unit July 2005 and June 2006 waited an average of 8 months for placement.

It must be noted, however, that the Meridian Housing Authority ranks applications on the wait list first by a specific list of preferences and then by time and date the application was made. Since these preferences moved some applicants more quickly through the placement process and forced others to wait longer for placement, the average wait period is difficult to estimate. Some applicants waited relatively short periods of time, while other applicants waited several months.

TOTAL NUMBER OF APPLICATIONS ON THE SECTION 8 VOUCHER WAITING LIST AS OF OCTOBER 31, 2005

Elderly	7
Non-elderly disabled	12
Families	219

NUMBER OF SECTION 8 VOUCHERS THAT BECAME AVAILABLE BETWEEN JULY 1, 2004 AND JUNE 30, 2005

There were 148 Section 8 Vouchers that became available. The Authority currently administers 148 vouchers.

NUMBER OF SECTION 8 VOUCHERS EXPECTED TO BECOME AVAILABLE DURING THE NEXT 12 MONTHS

The Authority anticipates 20 vouchers will become available during the next year based on turnover rates during the past year.

Section 6 PROJECTED PROFILES OF PROJECTS IN DESIGNATED STATE

IDENTIFY THE SOURCE OF RESIDENTS FOR THE DESIGNATED PROJECT

All HOPE VI elderly residents who currently occupy mixed population housing will remain in place and will be offered an opportunity to relocate to the designated site. Non-elderly residents currently residing in other MHA sites will not be required to vacate their units although opportunities and incentives will be offered to achieve the designated

status. Vacancies will be filled by elderly families and, if needed, near-elderly families from the Authority's applicant waiting list. As per Section 945.105, a near-elderly family is one whose head, spouse or sole member is at least 50 years old but below the age of 62. A near-elderly resident may or may not have a disability.

ESTIMATE THE NUMBER OF UNITS ANTICIPATED TO BECOME VACANT WITHIN TWO YEARS AFTER THE ALLOCATION PLAN IS SUBMITTED

MS004 05 24

ESTIMATE NUMBER OF NEAR-ELDERLY RESIDENTS WHO MAY BE NEEDED TO FILL UNITS AT DESIGNATED PROJECTS

MS004 05 6

ESTIMATE POSSIBLE IMPACT ON THE AVERAGE LENGTH OF TIME APPLICANTS MAY HAVE TO WAIT FOR A UNIT

It is estimated that elderly applicants may wait approximately 9 or 10 months for a unit in the Victory Village Elderly Cottages under the designation plan, while non-elderly disabled applicants may wait approximately 18 months for a voucher through the Section 8 program.

OCCUPANCY POLICY AND PROCEDURES FOR DESIGNATED PROJECTS

Changes to the Authority's waiting list or admission policies will not be implemented until the allocation plan is approved by HUD or 60 days after the plan is submitted to HUD officials. Following direct or indirect approval of the allocation plan, the Authority's Board of Directors will take action at their next regular board meeting to amend the Section 8 Administrative Plan and the Public Housing Admissions and Occupancy Policy to reflect the goals of this allocation plan.

Section 7 - STRATEGY FOR ADDRESSING THE CURRENT AND FUTURE HOUSING NEEDS OF FAMILIES IN THE AUTHORITY'S JURISDICTION

DESCRIBE STEPS PLANNED TO RESPOND TO ANY NEED FOR ACCESSIBLE UNITS THAT WILL NO LONGER BE AVAILABLE FOR APPLICANTS WHO NEED THEM

All accessible units will continue to be made available to non-elderly disabled persons.

These units will not be designated.

IF A PROJECT IS BEING DESIGNATED FOR ELDERLY FAMILIES, DESCRIBE STEPS PLANNED TO HELP NON-ELDERLY DISABLED FAMILIES ACCESS SUPPORTIVE SERVICES

A resident services coordinator currently serves all residents of the mixed population housing. This coordinator was placed to help elderly and non-elderly disabled residents maintain independent living. Under the allocation plan, the coordinator will continue serving residents of the designated site. The coordinator also will help non-elderly disabled residents of the Victory Village site to contact local advocacy groups and support agencies for supportive services.

In addition, the Authority intends to seek support for the allocation plan from the numerous advocacy groups and support agencies located in Meridian and Lauderdale County. These groups include, but are not limited to, the Mississippi State Vocational Rehabilitation Department (field office located in Meridian), the Lauderdale County Chapter of the American Red Cross, the Friendship House Center for Independent Living, Project Senior AIDES Services, Alcoholics Anonymous, Home Nursing Agencies, Alliance Health, Drug and Alcohol Services of Weems and Alliance Mental Health Centers, Greater Meridian Health Center, Rush, Riley, and Anderson Hospitals, the Salvation Army and Multi-County Community Service Agency, Inc. Many of these agencies, as well as other advocacy groups and support groups not listed here, provide caseworkers to help individuals continue living independently.

IF A PROJECT IS BEING DESIGNATED FOR ELDERLY FAMILIES, IDENTIFY ADDITIONAL HOUSING RESOURCES SUFFICIENT TO PROVIDE ASSISTANCE TO THE NUMBER OF NON-ELDERLY DISABLED FAMILIES WHO WOULD HAVE BEEN HOUSED IF THE ALLOCATION PLAN WAS NOT IMPLEMENTED

As noted above, the 8th and 9th Street developments that previously were designated for elderly families will continue to be available for elderly and non-elderly families. This will meet all demand for housing by non-elderly disabled families who would have been housed if the allocation plan was not implemented.

Ms. Patti Lane,

The following information is provided for the MHA Designated Housing Plan review per your request:

Page 13 combined occupancy data by bedroom size:

Non-elderly disabled families							
Location	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	Total
Western Gardens	0	0	7	17	2	1	27
Eastern Gardens	0	23	15	1	10	2	51
Sowashee Courts	2	4	10	3	0	2	21
Highway Village	0	12	8	2	0	0	22
George Reece Courts	0	6	6	1	0	0	13
Magnolia Courts	0	4	2	8	5	3	22
Frank Berry Courts	0	13	12	3	0	0	28
Scattered Sites A,B,C, D, F	3	9	8	15	3	0	38
Mt. View	0	8	6	0	0	0	14
Oakland Heights	0	41	0	0	0	0	41
J.T. Davis	0	4	2	3	0	0	9
Total	12	32	42	8	3	2	286
Elderly families							
Location	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	Total
Western Gardens	0	0	11	15	3	1	30
Eastern Gardens	0	30	20	0	7	1	58
Sowashee Courts	0	0	12	19	5	3	39
Highway Village	0	18	7	1	0	0	26
George Reece Courts	0	18	10	1	0	0	29
Magnolia Courts	0	8	6	5	4	2	25
Frank Berry Courts	0	19	13	6	0	0	38
Scattered Sites A,B,C, D, F	10	27	17	5	4	2	65
Mt. View	0	14	7	0	0	0	21
Oakland Heights	0	61	0	0	0	0	61
J.T. Davis	0	8	7	0	0	0	15
Total	10	203	110	52	23	9	407

Page 16 - the number of elderly and the number of non-elderly disabled families listed separately:

Number of elderly and non-elderly disabled families who currently receive HCV assistance:

Currently as of (August 2, 2007) there are:

- 35 Elderly families receiving HCV assistance
- 45 Non-elderly disabled families receiving HCV assistance

If you need further clarification concerning any of the submitted data please contact me at your earliest convenience.

Thank you,

Derwin K. Jackson 601-693-4285

Annual Statement/Performance and Evaluation Report

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

PHA Name: The Housing Authority of the City of Meridian

Grant Type and Number

Capital Fund Program Grant No: MS26P00450105
Replacement Housing Factor Grant No:

Federal FY of Grant:
2005 Capital Fund

9/30/2007

Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no:)

Performance and Evaluation Report for Period Ending: 9/30/07 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	\$ 426,522.00	\$ 426,522.00	\$ 426,522.00	\$ 426,522.00
3	1408 Management Improvements	\$ 35,000.00	\$ 27,715.97	\$ 27,715.97	\$ 27,715.97
4	1410 Administration	\$ 151,000.00	\$ 165,156.32	\$ 165,156.32	\$ 165,156.32
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$ 150,000.00	\$ 22,228.45	\$ 22,228.45	\$ 19,918.45
8	1440 Site Acquisition	\$ -	\$ -	\$ -	\$ -
9	1450 Site Improvement	\$ 117,250.00	\$ 1,560.00	\$ 1,560.00	\$ 1,560.00
10	1460 Dwelling Structures	\$ 354,477.50	\$ 764,758.66	\$ 764,758.66	\$ 496,417.74
11	1465.1 Dwelling Equipment—Nonexpendable	\$ 57,318.50	\$ 64,980.00	\$ 64,980.00	\$ 34,390.00
12	1470 Nondwelling Structures	\$ 716,044.00	\$ 583,957.00	\$ 583,957.00	\$ 513,553.98
13	1475 Nondwelling Equipment	\$ 115,000.00	\$ 71,582.86	\$ 71,582.86	\$ 44,283.48
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	\$ 10,000.00	\$ 4,150.74	\$ 4,150.74	\$ 4,150.74
18	1499 Development Activities				
19	1501 Collateralization or Debt Service	\$ -			
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 - 20)	\$ 2,132,612.00	\$ 2,132,612.00	\$ 2,132,612.00	\$ 1,733,668.68
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security - Soft Costs				
25	Amount of Line 21 Related to Security - Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450105 Replacement Housing Factor Grant No:				Federal FY of Grant: 2005 Capital Fund		9/30/2007	
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	Obligated	Expended		
MHA Wide	Operations	1406		\$ 426,522.00	\$ 426,522.00	\$ 426,522.00	\$ 426,522.00		
	Subtotal			\$ 426,522.00	\$ 426,522.00	\$ 426,522.00	\$ 426,522.00		
MHA Wide	Staff Training Computer Software	1408 1408		\$ 25,000.00 \$ 10,000.00	\$ 27,531.02 \$ 184.95	\$ 27,531.02 \$ 184.95	\$ 27,531.02 \$ 184.95		
	Subtotal			\$ 35,000.00	\$ 27,715.97	\$ 27,715.97	\$ 27,715.97		
MHA Wide	CFP Salaries Including Benefits	1410		\$ 151,000.00	\$ 165,156.32	\$ 165,156.32	\$ 165,156.32		
	Subtotal			\$ 151,000.00	\$ 165,156.32	\$ 165,156.32	\$ 165,156.32		
MHA Wide	A&E Fees	1430		\$ 150,000.00	\$ 22,228.45	\$ 22,228.45	\$ 19,918.45		
	Subtotal			\$ 150,000.00	\$ 22,228.45	\$ 22,228.45	\$ 19,918.45		
MHA Wide	Acquire Home Ownership / Public Housing Sites	1440		\$ -	\$ -				
	Subtotal			\$ -	\$ -	\$ -	\$ -		
MS004-003	Major Renovation Phase II (20 units) Work included but not limited to:	1450		\$ -	\$ -				

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450105 Replacement Housing Factor Grant No:			Federal FY of Grant: 2005 Capital Fund			9/30/2007	
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	Obligated	Expended		
MS004-002	Water Distribution Gas Distribution Electrical Distribution Sewer (as needed) Landscaping Handrails Parking, parking area, stripes Security lighting Repair Sidewalks/Tripping Hazards/Erosion (Annual Inspection Deficiencies)	1450		\$ 10,000.00	\$ -				
MS004-010	Repair Sidewalks/Tripping Hazards/Erosion (Annual Inspection Deficiencies)	1450		\$ 6,000.00	\$ -				
MS004-011	Repair Sidewalks/Tripping Hazards/Erosion (Annual Inspection Deficiencies)	1450		\$ 5,000.00	\$ -				
MS004-013	Repair Sidewalks/Tripping Hazards/Erosion (Annual Inspection Deficiencies)	1450		\$ 14,250.00	\$ -				
MS004-014	Erosion/Landscaping	1450		\$ 15,000.00	\$ -				
MS004-012A	Entrance Basketball Courts	1450		\$ 15,000.00	\$ -				
MS004-12B	Entrance Basketball Courts	1450		\$ 15,000.00	\$ -				

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450105 Replacement Housing Factor Grant No:				Federal FY of Grant: 2005 Capital Fund		
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	Obligated	Expended	
								9/30/2007
MHA-Wide	Remove Graffiti	1450		\$ 2,000.00	\$ 1,560.00	\$ 1,560.00	\$ 1,560.00	Ridgeways Pressure Wash
MHA Wide	Property Identification Signs	1450		\$ 35,000.00	\$ -			
	Subtotal			\$ 117,250.00	\$ 1,560.00	\$ 1,560.00	\$ 1,560.00	
	Phase III Major Renovation (20 units) Work included but not limited to: Renovation Kitchen Renovation Bathroom Renovation Floors Renovation Interior Painting Renovation Upgrade Electrical Renovation Upgrade Plumbing Replace Windows/Screens Replace Roofs Replace HVAC Replace Doors & Storm Doors Replace interior 4" sewer drain	1460		\$ -	\$ -		\$ -	
MS004-001	Peeling Paint (Annual Inspection Deficiencies)	1460	45	\$ 27,000.00	\$ 8,786.00	\$ 8,786.00	\$ 4,200.00	Squeaky Klean
MS004-002	Peeling Paint (Annual Inspection Deficiencies)	1460	40	\$ 24,000.00	\$ -			

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450105 Replacement Housing Factor Grant No:			Federal FY of Grant: 2005 Capital Fund			
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	Obligated	Expended	
								9/30/2007
MS004-006	Peeling Paint (Annual Inspection Deficiencies)	1460	25	\$ 15,000.00	\$ 4,966.00	\$ 4,966.00		Squeaky Klean
MS004-006	Storm Door Replacement	1460		\$ 65,000.00	\$ 29,342.43	\$ 29,342.43		Crimson Eagle
MS004-012A	Storm Door Replacement	1460			\$ 88,027.29	\$ 88,027.29		Crimson Eagle
MS004-012B	Storm Door Replacement	1460			\$ 108,341.28	\$ 108,341.28		Crimson Eagle
MS004-006	Refinish Bathtubs	1460		\$ 909.50	\$ 101,909.50	\$ 101,909.50	\$ 101,909.50	Hoover Electric
MS004-012B	Peeling Paint (Annual Inspection Deficiencies)	1460	125	\$ 75,000.00	\$ 24,448.00	\$ 24,448.00		Squeaky Klean
MS004-012B	Refinish Bathtubs	1460	194	\$ -				
MS004-012A	Fascia/Gutters/Porch Awnings	1460	155			\$ -		Moved to 06
MS004-012B	Fascia/Gutters/Porch Awnings	1460	194		\$ 110,509.92	\$ 110,509.92	\$ 101,880.00	Norman Enterprises
MS004-012C	Fascia/Gutters/Porch Awnings	1460	95		\$ 59,220.00	\$ 59,220.00	\$ 59,220.00	Norman Enterprises
MS004-003	Major Renovation Phase II	1460		\$ 147,568.00	\$ 152,139.74	\$ 152,139.74	\$ 152,139.74	Sullivan
MS004-012B	Replace Roofs	1460			\$ 77,068.50	\$ 77,068.50	\$ 77,068.50	Norman Roofing
	Subtotal			\$ 354,477.50	\$ 764,758.66	\$ 764,758.66	\$ 496,417.74	
MS004-003	Phase III Renovation Replace Appliances	1465		\$ -	\$ -			

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450105 Replacement Housing Factor Grant No:				Federal FY of Grant: 2005 Capital Fund			9/30/2007
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	Obligated	Expended		
MS004-012A	Replace Appliances	1465	155	\$ -	\$ -				
MS004-012B	Replace Appliances	1465	194	\$ -	\$ -				
MS004-012C	Replace Appliances	1465	95	\$ 57,318.50	\$ 64,980.00	\$ 64,980.00	\$ 34,390.00		
Subtotal				\$ 57,318.50	\$ 64,980.00	\$ 64,980.00	\$ 34,390.00		
MS004-007	New Maintenance Facility	1470		\$ 714,944.00	\$ 583,957.00	\$ 583,957.00	\$ 513,553.98		
MS004-012A	Repair/Replace Vinyl Siding Commity Center	1470		\$ -	\$ -				
MS004-012B	Repair/Replace Vinyl Siding Commity Center	1470		\$ -	\$ -				
MS004-003	Central Office Fencing	1470		\$ -	\$ -				
MHA Wide	Site Office Identification Signage	1470		\$ 1,100.00	\$ -				
Subtotal				\$ 716,044.00	\$ 583,957.00	\$ 583,957.00	\$ 513,553.98		
MHA Wide	Computer Hardware	1475		\$ 50,000.00	\$ 25,620.16	\$ 25,620.16	\$ 25,620.16		
MHA Wide	Maint Vehicles/Equipment	1475		\$ 65,000.00	\$ 45,962.70	\$ 45,962.70	\$ 18,663.32		
Subtotal				\$ 115,000.00	\$ 71,582.86	\$ 71,582.86	\$ 44,283.48		

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450105 Replacement Housing Factor Grant No:				Federal FY of Grant: 2005 Capital Fund			
									9/30/2007
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	Obligated	Expended		
MHA Wide	Relocation	1495		\$ 10,000.00	\$ 4,150.74	\$ 4,150.74	\$ 4,150.74		
	Subtotal			\$ 10,000.00	\$ 4,150.74	\$ 4,150.74	\$ 4,150.74		
	Subtotal		\$ -	\$ -	\$ -	\$ -	\$ -		
	Grand Total			\$ 2,132,612.00	\$ 2,132,612.00	\$ 2,132,612.00	\$ 1,733,668.68		

\$ - \$ -

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program No: MS26P004501045 Replacement Housing Factor No:			Federal FY of Grant: 2005 Capital Fund 9/30/2007		
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	
MHA Wide	8/17/2007			8/17/2009			H.R. 4194 pgs. 97-98 Obligation of funds - requirement 24 months from date which funds became available. Expenditure of funds - requirement 4 years from date which funds available.

Annual Statement/Performance and Evaluation Report

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

PHA Name: The Housing Authority of the City of Meridian

Grant Type and Number

Capital Fund Program Grant No: MS26P00450106
Replacement Housing Factor Grant No:

Federal FY of Grant:
2006 Capital Fund

9/30/2007

Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no:)

Performance and Evaluation Report for Period Ending: 9/30/07 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	\$ 343,460.00	\$ 343,460.00	\$ 343,460.00	\$ 343,460.00
3	1408 Management Improvements	\$ 100,000.00	\$ 100,000.00	\$ -	\$ -
4	1410 Administration	\$ 155,000.00	\$ 155,000.00	\$ 155,000.00	\$ 1,125.70
5	1411 Audit	\$ 1,000.00	\$ 1,000.00	\$ -	\$ -
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$ 100,000.00	\$ 100,000.00	\$ -	\$ -
8	1440 Site Acquisition	\$ 113,139.00	\$ 113,139.00	\$ -	\$ -
9	1450 Site Improvement	\$ -	\$ 23,842.59	\$ -	\$ -
10	1460 Dwelling Structures	\$ 424,601.67	\$ 485,870.08	\$ 112,270.08	\$ -
11	1465.1 Dwelling Equipment—Nonexpendable	\$ 109,992.33	\$ 109,992.33	\$ -	\$ -
12	1470 Nondwelling Structures	\$ -	\$ -	\$ -	\$ -
13	1475 Nondwelling Equipment	\$ 55,000.00	\$ 55,000.00	\$ -	\$ -
14	1485 Demolition	\$ 85,111.00	\$ -	\$ -	\$ -
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	\$ 10,000.00	\$ 10,000.00	\$ -	\$ -
18	1499 Development Activities				
19	1501 Collateralization or Debt Service	\$ 220,000.00	\$ 220,000.00	\$ 220,000.00	\$ -
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 - 20)	\$ 1,717,304.00	\$ 1,717,304.00	\$ 830,730.08	\$ 344,585.70
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security - Soft Costs				
25	Amount of Line 21 Related to Security - Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450106 Replacement Housing Factor Grant No:				Federal FY of Grant: 2006 Capital Fund			
						9/30/2007			
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	Obligated	Expended		
MHA Wide	Operations	1406		\$ 343,460.00	\$ 343,460.00	\$ 343,460.00	\$ 343,460.00		
	Subtotal			\$ 343,460.00	\$ 343,460.00	\$ 343,460.00	\$ 343,460.00		
MHA Wide	Staff Training	1408		\$ 50,000.00	\$ 50,000.00				
	Computer Software	1408		\$ 50,000.00	\$ 50,000.00				
	Subtotal			\$ 100,000.00	\$ 100,000.00	\$ -	\$ -		
MHA Wide	CFP Salaries Including Benefits	1410		\$ 155,000.00	\$ 155,000.00	\$ 155,000.00	\$ 1,125.70		
	Subtotal			\$ 155,000.00	\$ 155,000.00	\$ 155,000.00	\$ 1,125.70		
MHA Wod	Audit Cost	1411		\$ 1,000.00	\$ 1,000.00				
	Subtotal			\$ 1,000.00	\$ 1,000.00	\$ -	\$ -		
MHA Wide	A&E Fees	1430		\$ 100,000.00	\$ 100,000.00				
	Subtotal			\$ 100,000.00	\$ 100,000.00	\$ -	\$ -		
MHA Wide	Aquire Home Ownership/Public Housing Sites	1440		\$ 113,139.00	\$ 113,139.00				

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450106 Replacement Housing Factor Grant No:				Federal FY of Grant: 2006 Capital Fund		
						9/30/2007		
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	Obligated	Expended	
Subtotal				\$ 113,139.00	\$ 113,139.00	\$ -	\$ -	
MS004-004	Erosion/Landscaping	1450		\$ -	\$ -			
MS004-006	Erosion/Landscaping	1450		\$ -	\$ -			
MS004-013	Repair Sidewalks/Tripping Hazards/Erosion (Annual Inspection Deficiencies)	1450			\$ 11,421.30			
MS004-014	Repair Sidewalks/Tripping Hazards/Erosion (Annual Inspection Deficiencies)	1450			\$ 12,421.29			
Subtotal				\$ -	\$ 23,842.59	\$ -	\$ -	
MS004-010	Storm Door Replacement	1460		\$ -				
MS004-004	Fascia/Gutters/Downspouts	1460		\$ 30,000.00	\$ -			
MS004-006	Replace Interior Doors	1460		\$ 63,600.00	\$ 63,600.00			
MS004-006	Refinish Bathtubs	1460	52	\$ -	\$ -			

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450106 Replacement Housing Factor Grant No:			Federal FY of Grant: 2006 Capital Fund 9/30/2007			
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	Obligated	Expended	
MS004-012A	Replace Bathtubs	1460			\$ 310,000.00			
MS004-012A	Gable End Louvers	1460		\$ 26,500.00	\$ -			
MS004-012B	Gable End Louvers	1460		\$ 36,500.00	\$ -			
MS004-012B	Replace Roofs	1460		\$ 99,859.67	\$ -			
MS004-012C	Exterior Door & Frame	1460		\$ 64,800.00	\$ -			
MS004-012C	Storm Door Replacement	1460		\$ -	\$ -			
MS004-012C	Porch Awnings/Fascia/Gutters	1460		\$ 87,445.00	\$ -			
MS004-012C	Gable End Louvers	1460		\$ 15,897.00	\$ -			
MS004-12A	Porch Awnings/Fascia/Gutters	1460			\$ 98,700.00	\$ 98,700.00		
MS004-12B	Porch Awnings/Fascia/Gutters	1460			\$ 13,570.08	\$ 13,570.08		
Subtotal				\$ 424,601.67	\$ 485,870.08	\$ 112,270.08	\$ -	
MS004-012B	Replace Appliances	1465		\$ 109,992.33	\$ 109,992.33			

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

PHA Name:		Grant Type and Number				Federal FY of Grant:			
The Housing Authority of the City of Meridian		Capital Fund Program Grant No: MS26P00450106 Replacement Housing Factor Grant No:				2006 Capital Fund			
						9/30/2007			
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	Obligated	Expended		
	Subtotal			\$ 109,992.33	\$ 109,992.33	\$ -	\$ -		
MS004	Construction of Maintenance Facility	1470		\$ -	\$ -				
	Subtotal			\$ -	\$ -	\$ -	\$ -		
MHA Wide	Computer Hardware	1475		\$ 30,000.00	\$ 30,000.00				
MHA Wide	Maintenance Vehicles	1475		\$ 25,000.00	\$ 25,000.00				
	Subtotal			\$ 55,000.00	\$ 55,000.00	\$ -	\$ -		
MS004-007	Demolition Maintenance Facility	1485		\$ 85,111.00	\$ -				
	Subtotal			\$ 85,111.00	\$ -	\$ -	\$ -		
MHA Wide	Relocation	1495		\$ 10,000.00	\$ 10,000.00				
	Subtotal			\$ 10,000.00	\$ 10,000.00	\$ -	\$ -		

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450106 Replacement Housing Factor Grant No:				Federal FY of Grant: 2006 Capital Fund 9/30/2007			
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	Obligated	Expended		
	Bond Proceeds issued for Construction of 72 Units at J.T. Davis	1501		\$ 220,000.00	\$ 220,000.00	\$ 220,000.00			
Subtotal			\$ -	\$ 220,000.00	\$ 220,000.00	\$ 220,000.00	\$ -		
	Grand Total			\$ 1,717,304.00	\$ 1,717,304.00	\$ 830,730.08	\$ 344,585.70		

\$ - \$ -

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program No: MS26P00450106 Replacement Housing Factor No:			Federal FY of Grant: 2006 Capital Fund 9/30/2007		
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	
MHA Wide	7/17/2008			7/17/2010			H.R. 4194 pgs. 97-98 Obligation of funds - requirement 24 months from date which funds became available. Expenditure of funds - requirement 4 years from date which funds available.

Annual Statement/Performance and Evaluation Report

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

PHA Name: The Housing Authority of the City of Meridian

Grant Type and Number

Capital Fund Program Grant No: MS26P00450107
 Replacement Housing Factor Grant No:

Federal FY of Grant:
 2007 Capital Fund

9/30/2007

Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no:)

Performance and Evaluation Report for Period Ending:9/30/07 Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	\$ 322,450.00	\$ 322,450.00	\$ -	\$ -
3	1408 Management Improvements	\$ 30,000.00	\$ 30,000.00	\$ -	\$ -
4	1410 Administration	\$ 158,000.00	\$ 1,000.00	\$ -	\$ -
5	1411 Audit	\$ 1,000.00			
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$ 65,160.00	\$ 65,160.00	\$ -	\$ -
8	1440 Site Acquisition	\$ -	\$ -	\$ -	\$ -
9	1450 Site Improvement	\$ 80,000.00	\$ 33,125.00	\$ -	\$ -
10	1460 Dwelling Structures	\$ 300,000.00	\$ 504,721.00	\$ -	\$ -
11	1465.1 Dwelling Equipment—Nonexpendable	\$ -	\$ -	\$ -	\$ -
12	1470 Nondwelling Structures	\$ 39,500.00	\$ 39,500.00	\$ -	\$ -
13	1475 Nondwelling Equipment	\$ 48,182.00	\$ 48,336.00	\$ -	\$ -
14	1485 Demolition	\$ -			
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	\$ 5,000.00	\$ 5,000.00	\$ -	\$ -
18	1499 Development Activities				
19	1501 Collateralization or Debt Service	\$ 563,000.00			
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 - 20)	\$ 1,612,292.00	\$ 1,049,292.00	\$ -	\$ -
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security - Soft Costs				
25	Amount of Line 21 Related to Security - Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450107 Replacement Housing Factor Grant No:				Federal FY of Grant: 2007 Capital Fund			9/30/2007
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	Obligated	Expended		
MHA Wide	Operations	1406		\$ 322,450.00	\$ 322,450.00				
	Subtotal			\$ 322,450.00	\$ 322,450.00	\$ -	\$ -		
MHA Wide	Staff Training Computer Software	1408 1408		\$ 20,000.00 \$ 10,000.00	\$ 20,000.00 \$ 10,000.00				
	Subtotal			\$ 30,000.00	\$ 30,000.00	\$ -	\$ -		
MHA Wide	CFP Salaries Including Benefits	1410		\$ 158,000.00	\$ 158,000.00				
	Subtotal			\$ 158,000.00	\$ 158,000.00	\$ -	\$ -		
MHA Wod	Audit Cost	1411		\$ 1,000.00	\$ 1,000.00				
	Subtotal			\$ 1,000.00	\$ 1,000.00	\$ -	\$ -		
MHA Wide	A&E Fees	1430		\$ 65,160.00	\$ 65,160.00				
	Subtotal			\$ 65,160.00	\$ 65,160.00	\$ -	\$ -		
MHA Wide		1440		\$ -					

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name:		Grant Type and Number				Federal FY of Grant:			
The Housing Authority of the City of Meridian		Capital Fund Program Grant No: MS26P00450107 Replacement Housing Factor Grant No:				2007 Capital Fund			
						9/30/2007			
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	Obligated	Expended		
	Subtotal			\$ -	\$ -	\$ -	\$ -		
MS004-001	Erosion/Landscaping/Sewer Repair	1450		\$ 80,000.00					
MS004-011	Repair Sidewalks/Tripping Hazards/Erosion (Annual Inspection Deficiencies)	1450			\$ 5,000.00				
MS004-001	Rules/Safety Signs for Playgrounds	1450			\$ 3,125.00				
MS004-002	Rules/Safety Signs for Playgrounds	1450			\$ 3,125.00				
MS004-003	Rules/Safety Signs for Playgrounds	1450			\$ 3,125.00				
MS004-004	Rules/Safety Signs for Playgrounds	1450			\$ 3,125.00				
MS004-006	Rules/Safety Signs for Playgrounds	1450			\$ 3,125.00				
MS004-010D	Rules/Safety Signs for Playgrounds	1450			\$ 3,125.00				
MS004-013	Rules/Safety Signs for Playgrounds	1450			\$ 3,125.00				
MS004-12A	Rules/Safety Signs for Playgrounds	1450			\$ 3,125.00				
MS004-12B	Rules/Safety Signs for Playgrounds	1450			\$ 3,125.00				

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450107 Replacement Housing Factor Grant No:				Federal FY of Grant: 2007 Capital Fund		
						9/30/2007		
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	Obligated	Expended	
Subtotal				\$ 80,000.00	\$ 33,125.00	\$ -	\$ -	
MS004-001	Replace Storm Doors		1460		\$ 49,270.00			
MS004-002	Major Renovation Phase I		1460	\$ 300,000.00	\$ -			
MS004-006	Venthood Extingushing Systems	53	1460		\$ 26,860.00			
MS004-10F	Roof/fascia/gutter replacement		1460		\$ 60,000.00			
MS004-011	Replace Storm Doors		1460		\$ 16,610.00			
MS004-13	Cover Sheetrock walls with Lauan		1460		\$ 250,000.00			
MS004-014	Replace Storm Doors		1460		\$ 13,841.00			
MS004-014	Exterior Gable Vents/fascia/soffit		1460		\$ 40,000.00			
MS004-012C	Venthood Extingushing Systems	95	1460		\$ 48,140.00			
Subtotal				\$ 300,000.00	\$ 504,721.00	\$ -	\$ -	
			1465					
Subtotal				\$ -	\$ -	\$ -	\$ -	

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450107 Replacement Housing Factor Grant No:				Federal FY of Grant: 2007 Capital Fund 9/30/2007			
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	Obligated	Expended		
	Roof for Canopy Central Office	1470		\$ 39,500.00	\$ 39,500.00				
Subtotal				\$ 39,500.00	\$ 39,500.00	\$ -	\$ -		
MHA Wide	Computer Hardware	1475		\$ 30,000.00	\$ 30,000.00				
MHA Wide	Maint. Vehicles/Equipment	1475		\$ 18,182.00	\$ 18,336.00				
Subtotal				\$ 48,182.00	\$ 48,336.00	\$ -	\$ -		
		1485							
Subtotal				\$ -	\$ -	\$ -	\$ -		
MHA Wide	Relocation	1495		\$ 5,000.00	\$ 5,000.00				
Subtotal				\$ 5,000.00	\$ 5,000.00	\$ -	\$ -		

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450107 Replacement Housing Factor Grant No:				Federal FY of Grant: 2007 Capital Fund 9/30/2007			
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	Obligated	Expended		
	Bond Proceeds issued for Construction of 72 Units at J.T. Davis	1501		\$ 563,000.00	\$ 563,000.00	\$ 563,000.00			
Subtotal			\$ -	\$ 563,000.00	\$ 563,000.00	\$ 563,000.00	\$ -		
	Grand Total			\$ 1,612,292.00	\$ 1,612,292.00	\$ 563,000.00	\$ -		

\$ - \$ -

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program No: MS26P00450107 Replacement Housing Factor No:			Federal FY of Grant: 2007 Capital Fund 9/30/2007		
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	
MHA Wide	9/13/2009			9/13/2011			H.R. 4194 pgs. 97-98 Obligation of funds - requirement 24 months from date which funds became available. Expenditure of funds - requirement 4 years from date which funds available.

Annual Statement/Performance and Evaluation Report

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

PHA Name: The Housing Authority of the City of Meridian

Grant Type and Number

Capital Fund Program Grant No: MS26P00450108
Replacement Housing Factor Grant No:

Federal FY of Grant:
2008 Capital Fund

9/30/2007

Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no:)

Performance and Evaluation Report for Period Ending: Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	\$ 322,450.00	\$ -	\$ -	\$ -
3	1408 Management Improvements	\$ 30,000.00	\$ -	\$ -	\$ -
4	1410 Administration	\$ 158,000.00	\$ -	\$ -	\$ -
5	1411 Audit	\$ 1,000.00			
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$ 63,339.00	\$ -	\$ -	\$ -
8	1440 Site Acquisition	\$ -	\$ -	\$ -	\$ -
9	1450 Site Improvement	\$ 222,221.00	\$ -	\$ -	\$ -
10	1460 Dwelling Structures	\$ 200,850.00	\$ -	\$ -	\$ -
11	1465.1 Dwelling Equipment—Nonexpendable	\$ -	\$ -	\$ -	\$ -
12	1470 Nondwelling Structures	\$ -	\$ -	\$ -	\$ -
13	1475 Nondwelling Equipment	\$ 48,182.00	\$ -	\$ -	\$ -
14	1485 Demolition	\$ -			
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	\$ 5,000.00	\$ -	\$ -	\$ -
18	1499 Development Activities				
19	1501 Collaterization or Debt Service	\$ 561,250.00			
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 - 20)	\$ 1,612,292.00	\$ -	\$ -	\$ -
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security - Soft Costs				
25	Amount of Line 21 Related to Security - Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450108 Replacement Housing Factor Grant No:				Federal FY of Grant: 2008 Capital Fund 9/30/2007			
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	Obligated	Expended		
MHA Wide	Operations	1406		\$ 322,450.00					
	Subtotal			\$ 322,450.00	\$ -	\$ -	\$ -		
MHA Wide	Staff Training Computer Software	1408 1408		\$ 20,000.00 \$ 10,000.00					
	Subtotal			\$ 30,000.00	\$ -	\$ -	\$ -		
MHA Wide	CFP Salaries Including Benefits	1410		\$ 158,000.00					
	Subtotal			\$ 158,000.00	\$ -	\$ -	\$ -		
MHA Wod	Audit Cost	1411		\$ 1,000.00					
	Subtotal			\$ 1,000.00	\$ -	\$ -	\$ -		
MHA Wide	A&E Fees	1430		\$ 63,339.00					
	Subtotal			\$ 63,339.00	\$ -	\$ -	\$ -		
MHA Wide		1440		\$ -					

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name:		Grant Type and Number				Federal FY of Grant:			
The Housing Authority of the City of Meridian		Capital Fund Program Grant No: MS26P00450108 Replacement Housing Factor Grant No:				2008 Capital Fund			
						9/30/2007			
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	Obligated	Expended		
	Subtotal			\$ -	\$ -	\$ -	\$ -		
MS004-003	Exterior Lighting	1450		\$ 170,000.00					
MS004-001	Playground Resurfacing	1450		\$ 4,502.00					
MS004-002	Playground Resurfacing	1450		\$ 3,589.00					
MS004-003	Playground Resurfacing	1450		\$ 2,230.00					
MS004-004	Playground Resurfacing	1450		\$ 4,894.00					
MS004-006	Playground Resurfacing	1450		\$ 3,987.00					
MS004-010D	Playground Resurfacing	1450		\$ 3,883.00					
MS004-013	Playground Resurfacing	1450		\$ 10,000.00					
MS004-012A	Playground Resurfacing	1450		\$ 9,946.00					
MS004-012B	Playground Resurfacing	1450		\$ 9,190.00					
	Subtotal			\$ 222,221.00	\$ -	\$ -	\$ -		
MS004-002	Major Renovation Phase I	1460		\$ 200,000.00	\$ -				
MS004-006	Building Identification	1460		\$ 850.00					

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450108 Replacement Housing Factor Grant No:			Federal FY of Grant: 2008 Capital Fund 9/30/2007			
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	Obligated	Expended	
	Subtotal			\$ 200,850.00	\$ -	\$ -	\$ -	
		1465						
	Subtotal			\$ -	\$ -	\$ -	\$ -	
		1470						
	Subtotal			\$ -	\$ -	\$ -	\$ -	
MHA Wide	Computer Hardware	1475		\$ 30,000.00				
MHA Wide	Maint. Vehicles/Equipment	1475		\$ 18,182.00				

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program Grant No: MS26P00450108 Replacement Housing Factor Grant No:				Federal FY of Grant: 2008 Capital Fund 9/30/2007			
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	Obligated	Expended		
	Subtotal			\$ 48,182.00	\$ -	\$ -	\$ -		
		1485							
	Subtotal			\$ -	\$ -	\$ -	\$ -		
MHA Wide	Relocation	1495		\$ 5,000.00					
	Subtotal			\$ 5,000.00	\$ -	\$ -	\$ -		
	Bond Proceeds issued for Construction of 72 Units at J.T. Davis	1501		\$ 561,250.00					
	Subtotal		\$ -	\$ 561,250.00	\$ -	\$ -	\$ -		
	Grand Total			\$ 1,612,292.00	\$ -	\$ -	\$ -		

\$ -

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

PHA Name: The Housing Authority of the City of Meridian		Grant Type and Number Capital Fund Program No: MS26P00450108 Replacement Housing Factor No:			Federal FY of Grant: 2008 Capital Fund 9/30/2007		
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	
MHA Wide	9/13/2010			9/13/2012			H.R. 4194 pgs. 97-98 Obligation of funds - requirement 24 months from date which funds became available. Expenditure of funds - requirement 4 years from date which funds available.

Capital Fund Program Five-Year Action Plan

Part I: Summary

PHA Name		The Housing Authority of the City of Meridian		Original 5-Year Plan Revision No:	
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2009 PHA FY: 2009	Work Statement for Year 3 FFY Grant: 2010 PHA FY: 2010	Work Statement for Year 4 FFY Grant: 2011 PHA FY: 2011	Work Statement for Year 5 FFY Grant: 2012 PHA FY: 2012
	Annual Statement				
MS004-001 Highway Village					
MS004-002 Frank Berry Courts		\$ 600,000.00			
MS004-012 Oakland Heights					\$ 301,182.00
MS004-013 Sowashee Courts					\$ 50,000.00
MS004-014 Scattered Sites			\$ 55,000.00		
MS004-003 Mt. View Village					
MS004-012 Western Gardens			\$ 492,632.00		\$ 131,700.00
MS004-012 Eastern Gardens				\$ 588,632.00	
MS004-006 Magnolia Courts					
MS004-010 Scattered Sites			\$ 49,000.00		\$ 60,000.00
MS004-011 Scattered Sites					
HA -Wide		\$ 1,012,292.00	\$ 1,015,660.00	\$ 1,023,660.00	\$ 1,069,410.00
CFP Funds Listed for 5-year planning		\$ 1,612,292.00	\$ 1,612,292.00	\$ 1,612,292.00	\$ 1,612,292.00
Replacement Housing Factor Funds					

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: <u>09</u>			Activities for Year : <u>10</u>		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	MS004-002 Frank Berry Courts	Major Renovation (1460)	\$ 600,000.00	MS004-012A Western Gardens	Central Heating Systems (1460)	\$ 492,632.00
Annual				MS004-14 Scattered Sites	Interior Doors (1460)	\$ 40,000.00
					Storm Door Replacement (1460)	\$ 15,000.00
Statement				Ms004-010 Scattered Sites	Repair Gazebo (1470)	\$ 8,000.00
					Landscaping (1450)	\$ 5,000.00
					Storm Door Replacement (1460)	\$ 36,000.00
	HA-wide	Operations (1406)	\$ 105,910.00	HA-wide	Operations (1406)	\$ 105,910.00
		Management Improvements (1408)	\$ 50,000.00		Management Improvements (1408)	\$ 50,000.00
		Administration (1410)	\$ 155,000.00		Administration (1410)	\$ 155,000.00
		Fees & costs (1430)	\$ 92,382.00		Fees & Costs (1430)	\$ 93,500.00
		Maintenance & computer equipment (1475)	\$ 50,000.00		Maintenance & Computer Equipment (1475)	\$ 50,000.00
		Bond Proceeds issued for construction of 72 Units at J.T Davis (1501) (See attachment ms004h01 for detailed plan)	\$ 559,000.00		Bond Proceeds issued for construction of 72 Units at J.T Davis (1501) (See attachment ms004h01 for detailed plan)	\$ 561,250.00
Total CFP			\$ 1,612,292.00			\$ 1,612,292.00

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages—Work Activities

Activities for Year 1	Activities for Year: <u>11</u>			Activities for Year: <u>12</u>		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	MS004-012B Eastern Gardens	Replace Central Heating Systems (1460)	\$ 440,432.00	MS004-12A Western Gardens	Storm Door Replacement (1460)	\$ 100,000.00
Annual		Water Heater Replacement (1465)	\$ 58,200.00	MS004-12A Western Gardens	Water Heater Replacement (1465)	\$ 31,700.00
Statement		Exterior Door Replacement (1460)	\$ 90,000.00	MS004-013 Sowashee Courts	Security Fencing Breezeway area (1450)	\$ 50,000.00
				MS004-010 Scattered Sites	Gutters/Fascia (1460)	\$ 60,000.00
				MS004-012C Oakland Heights	Replace Central Heating Systems (1460)	\$ 301,182.00
	HA-wide	Operations (1406)	\$ 105,910.00	HA-wide	Operations (1406)	\$ 105,910.00
		Management Improvements (1408)	\$ 50,000.00		Management Improvements (1408)	\$ 50,000.00
		Administration (1410)	\$ 155,000.00		Administration (1410)	\$ 155,000.00
		Fees & Costs (1430)	\$ 100,000.00		Fees & Costs (1430)	\$ 100,000.00
		Maintenance/Computer Equipment (1475)	\$ 50,000.00		Maintenance/Computer Equipment (1475)	\$ 100,000.00
		Bond Proceeds issued for construction of 72 Units at J.T Davis (1501) (See attachment ms004h01 for detailed plan)	\$ 562,750.00		Bond Proceeds issued for construction of 72 Units at J.T Davis (1501) (See attachment ms004h01 for detailed plan)	\$ 558,500.00
Total CFP			\$ 1,612,292.00			\$ 1,612,292.00

**EXHIBIT F-1 - Permanent
SUMMARY BUDGET FOR SPECIFIC PHASE
(Rename columns with actual development sources)**

	Public Hsg Funds	Private Funds	Other Public Funds	Total Funds
A. Proposal: Development Sources				
HOPE VI Funds	\$ 988,225			\$ 988,225
Capital Funds - Bonds	\$ 5,353,483			\$ 5,353,483
HOME				\$ -
CDBG				\$ -
Tax Credit Equity		\$ 3,455,884		\$ 3,455,884
Federal Home Loan Bank Aff. Hsg. Funds				\$ -
First Mortgage				\$ -
Bridge Loan				\$ -
Other City Funds				\$ -
Other:				\$ -
Other:				\$ -
Subtotal Development Sources	\$ 6,341,708	\$ 3,455,884	\$ -	\$ 9,797,592
B. Additional Project Sources				
HOPE VI Funds	\$ 1,152,759			\$ 1,152,759
Capital Funds - Bonds	\$ 1,426,517			\$ 1,426,517
Other: HOPE VI Demolition Grant	\$ 555,662			\$ 555,662
<i>TOTAL SOURCES (A & B)</i>	\$ 9,476,646	\$ 3,455,884	\$ -	\$ 12,932,530
A. Proposal: Development Uses				
Construction Costs:				
Residential Construction	\$ 4,129,789	\$ 476,284		\$ 4,606,073
Site Work	\$ 799,339	\$ -		\$ 799,339
General Requirements	\$ 299,759	\$ 22,562		\$ 322,321
Builder's Overhead	\$ 99,920	\$ 7,521		\$ 107,441
Builder's Profit	\$ 299,759	\$ 22,562		\$ 322,321
Bond Premium				\$ -
Utilities from the Street	\$ 63,396	\$ 23,449		\$ 86,845
Finish Landscaping				\$ -
Public Improvements				\$ -
Contingency	\$ -	\$ 307,875		\$ 307,875
Other:				\$ -
Other:				\$ -
Subtotal	\$ 5,691,962	\$ 860,253	\$ -	\$ 6,552,215
Development Fees:				
Architects	\$ 431,710	\$ 32,495		\$ 464,205
Accounting	\$ 23,250	\$ 1,750		\$ 25,000
PHA Legal				\$ -
Developer Legal		\$ 175,000		\$ 175,000
Permits				\$ -
Appraisal	\$ 8,835	\$ 665		\$ 9,500
Environmental	\$ 4,650	\$ 350		\$ 5,000
Geotechnical	\$ 51,150	\$ 3,850		\$ 55,000
Constr. PILOT & Taxes				\$ -

**EXHIBIT F-1 - Permanent
SUMMARY BUDGET FOR SPECIFIC PHASE
(Rename columns with actual development sources)**

	Public Hsg Funds	Private Funds	Other Public Funds	Total Funds
Insurance	\$ 60,401	\$ 4,735		\$ 65,136
Title & Recording Fees	\$ 69,750	\$ 5,250		\$ 75,000
First Mortgage Interest				\$ -
Construction Loan Interest		\$ 135,473		\$ 135,473
Financing Costs		\$ 42,000		\$ 42,000
Consultants				\$ -
Equipment & Furnishings		\$ 49,536		\$ 49,536
Tax Credit Fees		\$ 90,128		\$ 90,128
Marketing		\$ 100,489		\$ 100,489
Lease-Up Interest & Expenses				\$ -
Initial Operating Period Reserve		\$ 65,899		\$ 65,899
Operating Subsidy Reserve		\$ 70,652		\$ 70,652
Operating Deficit Reserve		\$ 705,000		\$ 705,000
Exit Tax Reserve				\$ -
Developer's Fee		\$ 678,600		\$ 678,600
Other: Escrows		\$ 9,850		\$ 9,850
Other: Affordability Reserve		\$ 423,909		\$ 423,909
Subtotal	\$ 649,746	\$ 2,595,631	\$ -	\$ 3,245,377
Total Project Development Costs (Proposal)	\$ 6,341,708	\$ 3,455,884	\$ -	\$ 9,797,592
B. Additional Project Uses				
Bond Issuance - Captilized Interest	\$ 565,942			\$ 565,942
Bond Issuance - Debt Service Reserve	\$ 563,250			\$ 563,250
Bond Issuance - Cost of Issuance	\$ 297,325			\$ 297,325
MHA Maintenance Facility (\$400K/184U*67U)	\$ 145,652			\$ 145,652
Demolition & Remediation	\$ 425,324			\$ 425,324
Relocation	\$ 30,338			\$ 30,338
CSS Management Improvements	\$ 362,975			\$ 362,975
CSS Other Services	\$ 22,314			\$ 22,314
Administration - Management Improvements	\$ 257,355			\$ 257,355
Administration - General	\$ 141,322			\$ 141,322
Consultant Fees	\$ 223,141			\$ 223,141
Environmental Reserve	\$ 100,000			\$ 100,000
Total Additional Uses	\$ 3,134,938	\$ -	\$ -	\$ 3,134,938
TOTAL PROJECT USES (A & B)	\$ 9,476,646	\$ 3,455,884	\$ -	\$ 12,932,530

EXHIBIT F-1 - Construction
SUMMARY BUDGET FOR SPECIFIC PHASE
(Rename columns with actual development sources)

	Public Hsg Funds	Private Funds	Other Public Funds	Total Funds
A. Proposal: Development Sources				
HOPE VI Funds	\$ 988,225			\$ 988,225
Capital Funds - Bonds	\$ 5,353,483			\$ 5,353,483
HOME				\$ -
CDBG				\$ -
Tax Credit Equity		\$ 2,055,884		\$ 2,055,884
Federal Home Loan Bank Aff. Hsg. Funds				\$ -
First Mortgage				\$ -
Bridge Loan				\$ -
Other City Funds				\$ -
Other: Construction Loan		\$ 1,400,000		\$ 1,400,000
Other:				\$ -
Subtotal Development Sources	\$ 6,341,708	\$ 3,455,884	\$ -	\$ 9,797,592
B. Additional Project Sources				
HOPE VI Funds	\$ 1,152,759			\$ 1,152,759
Capital Funds - Bonds	\$ 1,426,517			\$ 1,426,517
Other: HOPE VI Demolition Grant	\$ 455,662			\$ 455,662
Environmental Reserve	\$ 100,000			\$ -
<i>TOTAL SOURCES (A & B)</i>	\$ 9,476,646	\$ 3,455,884	\$ -	\$ 12,832,530
A. Proposal: Development Uses				
Construction Costs:				
Residential Construction	\$ 4,129,789	\$ 476,284		\$ 4,606,073
Site Work	\$ 799,339	\$ -		\$ 799,339
General Requirements	\$ 299,759	\$ 22,562		\$ 322,321
Builder's Overhead	\$ 99,920	\$ 7,521		\$ 107,441
Builder's Profit	\$ 299,759	\$ 22,562		\$ 322,321
Bond Premium				\$ -
Utilities from the Street	\$ 63,396	\$ 23,449		\$ 86,845
Finish Landscaping				\$ -
Public Improvements				\$ -
Contingency	\$ -	\$ 307,875		\$ 307,875
Other:				\$ -
Other:				\$ -
Subtotal	\$ 5,691,962	\$ 860,253	\$ -	\$ 6,552,215
Development Fees:				
Architects	\$ 431,710	\$ 32,495		\$ 464,205
Accounting	\$ 23,250	\$ 1,750		\$ 25,000
PHA Legal				\$ -
Developer Legal		\$ 175,000		\$ 175,000
Permits				\$ -
Appraisal	\$ 8,835	\$ 665		\$ 9,500
Environmental	\$ 4,650	\$ 350		\$ 5,000
Geotechnical	\$ 51,150	\$ 3,850		\$ 55,000
Constr. PILOT & Taxes				\$ -

EXHIBIT F-1 - Construction
SUMMARY BUDGET FOR SPECIFIC PHASE
(Rename columns with actual development sources)

	Public Hsg Funds	Private Funds	Other Public Funds	Total Funds
Insurance	\$ 60,401	\$ 4,735		\$ 65,136
Title & Recording Fees	\$ 69,750	\$ 5,250		\$ 75,000
First Mortgage Interest				\$ -
Construction Loan Interest		\$ 135,473		\$ 135,473
Financing Costs		\$ 42,000		\$ 42,000
Consultants				\$ -
Equipment & Furnishings		\$ 49,536		\$ 49,536
Tax Credit Fees		\$ 90,128		\$ 90,128
Marketing		\$ 100,489		\$ 100,489
Lease-Up Interest & Expenses				\$ -
Initial Operating Period Reserve		\$ 65,899		\$ 65,899
Operating Subsidy Reserve		\$ 70,652		\$ 70,652
Operating Deficit Reserve		\$ 705,000		\$ 705,000
Exit Tax Reserve				\$ -
Developer's Fee		\$ 678,600		\$ 678,600
Other: Escrows		\$ 9,850		\$ 9,850
Other: Affordability Reserve		\$ 423,909		\$ 423,909
Subtotal	\$ 649,746	\$ 2,595,631	\$ -	\$ 3,245,377
Total Project Development Costs (Proposal)	\$ 6,341,708	\$ 3,455,884	\$ -	\$ 9,797,592
B. Additional Project Uses				
Bond Issue - Capitalized Interest	\$ 565,942			\$ 565,942
Bond Issue - Debt Service Reserve	\$ 563,250			\$ 563,250
Bond Issue - Cost of Issuance	\$ 297,325			\$ 297,325
MHA Maintenance Facility (\$400K/184U*67U)	\$ 145,652			\$ 145,652
Demolition & Remediation	\$ 425,324			\$ 425,324
Relocation	\$ 30,338			\$ 30,338
CSS Management Improvements	\$ 362,975			\$ 362,975
CSS Other Services	\$ 22,314			\$ 22,314
Administration - Management Improvements	\$ 257,355			\$ 257,355
Administration - General	\$ 141,322			\$ 141,322
Consultant Fees	\$ 223,141			\$ 223,141
Environmental Reserve	\$ 100,000			\$ 100,000
Other:				\$ -
Total Additional Uses	\$ 3,134,938	\$ -	\$ -	\$ 3,134,938
TOTAL PROJECT USES (A & B)	\$ 9,476,646	\$ 3,455,884	\$ -	\$ 12,932,530

Attachment ms004g01

Proposed Phase Unit Mix Post Revitalization

Grantee: _____ Development Name: _____ Specific Phase: _____

Type of Structure	Number of Bedrooms	Rehab of Existing Public Housing				New Construction (development or acquisition/rehab)			
		PH ACC Replacement Units	Non-ACC Rental Units	Affordable Homeownership Replacement Units	Market Homeownership	PH ACC Replacement Units	Non-ACC Rental Units	Affordable Homeownership Replacement Units	Market Homeownership
Detached									
	1								
	2								
	3								
	4								
	5								
	Other (describe)								
Semi-Detached									
	1					10	0		
	2					30	1		
	3					19	2		
	4								
	5								
	Other (describe)								
Row House									
	1								
	2								
	3								
	4								
	5								
	Other (describe)								
Walk-Up									
	1					4			
	2					4	2		
	3								
	4								
	Other (describe)								
Elevator									
	1								
	2								
	Other (describe)								
	Totals	0	0	0	0	67	5	0	0

Attachment ms004g01

Proposed Phase Unit Mix Post Revitalization

Grantee: _____ Development Name: _____ Specific Phase: _____

	Rehab of Existing Public Housing				New Construction (development or acquisition/rehab)			
	PH ACC Replacement Units	Non-ACC Rental Units	Affordable Homeownership Replacement Units	Market Homeownership	PH ACC Replacement Units	Non-ACC Rental Units	Affordable Homeownership Replacement Units	Market Homeownership
Mobility Impaired - % of Category					5%			
Hearing and sight impaired - % of Category					2%			
Describe methods to be used to make the development visitable:	Units will be made visitable to the greatest extent possible with at-grade entrances where possible, 34" wide entrances, ground floor bathrooms with 34" entrances, 32" passageways through all openings and fully accessible dining, living and family rooms.							

**Housing Authority of Meridian
Series 2005
Sources and Uses**

	Series A	Series B	Total
Sources			
Bond Proceeds	6,610,000.00	170,000.00	6,780,000.00
Accrued Interest	-	-	-
	<u>6,610,000.00</u>	<u>170,000.00</u>	<u>6,780,000.00</u>
Uses			
Construction Fund:	5,348,608.33	4,875.00	5,353,483.33
Capitalized Interest (bond interest from 12/31/05 thru 9/1/07)*	565,941.67		565,941.67
Debt Service Reserve (Maximum Annual Debt Service)	563,250.00		563,250.00
Costs of Issuance	132,200.00	165,125.00	297,325.00
Accrued Interest	-	-	-
	<u>6,610,000.00</u>	<u>170,000.00</u>	<u>6,780,000.00</u>

* Accrued interest between dated date and delivery date not included.

Attachment ms004901	
Housing Authority Name	Housing Authority of Meridian
TE Bond Par Amount	6,610,000
TX Bond Par Amount	170,000
Annual TE Bond Interest Rate	5.00%
Annual TX Bond Interest Rate	5.00%
Rate Type	Fixed Rate
Bond Term	19.67
Bond Payments per Year	Semi-annual
First Bond Payment Date	3/1/2006
First Bond Payment from LOCSS Due	8/29/2007

Date	Series A Principal	Series B Principal	Interest	Total Debt Service Payment	Annual Debt Service Payment Amount	Other Ongoing Payment Requirements Associated with Financing	Interest Earned and Paid to HA (3% Earnings Assumption)	Net Annual Debt Service Amount	Adjusted FY 2005 Capital Fund Appropriations	FY 2005 RHF Fund Appropriations	Total Adjusted Capital Fund Appropriations	Total Adjusted Capital Fund as a Multiple of Annual Debt Service Payment Amount	Annual Debt Service Payment Amount as a % of Adjusted Capital Fund Appropriations	LOCCS Date	LOCCS Payment	FY of Capital Debt Service Payment is to be Paid From
12/31/2005																
12/31/2005																
3/1/2006			57,441.67	57,441.67												
9/1/2006			169,500.00	169,500.00	226,941.67	2,008.33	(11,311.94)	217,638.06						Cap I		
3/1/2007			169,500.00	169,500.00										Cap I		
9/1/2007	50,000	170,000	169,500.00	389,500.00	559,000.00	3,000.00	(16,897.50)	545,102.50	1,690,186.00		1,690,186.00	3.02	33.073%	8/29/2007	220,000.00	2006
3/1/2008			164,000.00	164,000.00				-						2/27/2008	164,000.00	2006
9/1/2008	235,000		164,000.00	399,000.00	563,000.00	3,000.00	(16,897.50)	549,102.50	1,690,186.00		1,690,186.00	3.00	33.310%	8/27/2008	399,000.00	2007
3/1/2009			158,125.00	158,125.00				-						2/25/2009	158,125.00	2007
9/1/2009	245,000		158,125.00	403,125.00	561,250.00	3,000.00	(16,897.50)	547,352.50	1,690,186.00		1,690,186.00	3.01	33.206%	8/27/2009	403,125.00	2008
3/1/2010			152,000.00	152,000.00				-						2/24/2010	152,000.00	2008
9/1/2010	255,000		152,000.00	407,000.00	559,000.00	3,000.00	(16,897.50)	545,102.50	1,690,186.00		1,690,186.00	3.02	33.073%	8/27/2010	407,000.00	2009
3/1/2011			145,625.00	145,625.00				-						2/24/2011	145,625.00	2009
9/1/2011	270,000		145,625.00	415,625.00	561,250.00	3,000.00	(16,897.50)	547,352.50	1,690,186.00		1,690,186.00	3.01	33.206%	8/29/2011	415,625.00	2010
3/1/2012			138,875.00	138,875.00				-						2/27/2012	138,875.00	2010
9/1/2012	285,000		138,875.00	423,875.00	562,750.00	3,000.00	(16,897.50)	548,852.50	1,690,186.00		1,690,186.00	3.00	33.295%	8/29/2012	423,875.00	2011
3/1/2013			131,750.00	131,750.00				-						2/26/2013	131,750.00	2011
9/1/2013	295,000		131,750.00	426,750.00	558,500.00	3,000.00	(16,897.50)	544,602.50	1,690,186.00		1,690,186.00	3.03	33.044%	8/28/2013	426,750.00	2012
3/1/2014			124,375.00	124,375.00				-						2/26/2014	124,375.00	2012
9/1/2014	310,000		124,375.00	434,375.00	558,750.00	3,000.00	(16,897.50)	544,852.50	1,690,186.00		1,690,186.00	3.02	33.058%	8/27/2014	434,375.00	2013
3/1/2015			116,625.00	116,625.00				-						2/25/2015	116,625.00	2013
9/1/2015	330,000		116,625.00	446,625.00	563,250.00	3,000.00	(16,897.50)	549,352.50	1,690,186.00		1,690,186.00	3.00	33.325%	8/27/2015	446,625.00	2014
3/1/2016			108,375.00	108,375.00				-						2/25/2016	108,375.00	2014
9/1/2016	345,000		108,375.00	453,375.00	561,750.00	3,000.00	(16,897.50)	547,852.50	1,690,186.00		1,690,186.00	3.01	33.236%	8/29/2016	453,375.00	2015
3/1/2017			99,750.00	99,750.00				-						2/24/2017	99,750.00	2015
9/1/2017	360,000		99,750.00	459,750.00	559,500.00	3,000.00	(16,897.50)	545,602.50	1,690,186.00		1,690,186.00	3.02	33.103%	8/29/2017	459,750.00	2016
3/1/2018			90,750.00	90,750.00				-						2/26/2018	90,750.00	2016
9/1/2018	380,000		90,750.00	470,750.00	561,500.00	3,000.00	(16,897.50)	547,602.50	1,690,186.00		1,690,186.00	3.01	33.221%	8/29/2018	470,750.00	2017
3/1/2019			81,250.00	81,250.00				-						2/26/2019	81,250.00	2017
9/1/2019	400,000		81,250.00	481,250.00	562,500.00	3,000.00	(16,897.50)	548,602.50	1,690,186.00		1,690,186.00	3.00	33.280%	8/28/2019	481,250.00	2018
3/1/2020			71,250.00	71,250.00				-						2/26/2020	71,250.00	2018
9/1/2020	420,000		71,250.00	491,250.00	562,500.00	3,000.00	(16,897.50)	548,602.50	1,690,186.00		1,690,186.00	3.00	33.280%	8/27/2020	491,250.00	2019
3/1/2021			60,750.00	60,750.00				-						2/24/2021	60,750.00	2019
9/1/2021	440,000		60,750.00	500,750.00	561,500.00	3,000.00	(16,897.50)	547,602.50	1,690,186.00		1,690,186.00	3.01	33.221%	8/27/2021	500,750.00	2020
3/1/2022			49,750.00	49,750.00				-						2/24/2022	49,750.00	2020
9/1/2022	460,000		49,750.00	509,750.00	559,500.00	3,000.00	(16,897.50)	545,602.50	1,690,186.00		1,690,186.00	3.02	33.103%	8/29/2022	509,750.00	2021
3/1/2023			38,250.00	38,250.00				-						2/24/2023	38,250.00	2021
9/1/2023	485,000		38,250.00	523,250.00	561,500.00	3,000.00	(16,897.50)	547,602.50	1,690,186.00		1,690,186.00	3.01	33.221%	8/29/2023	523,250.00	2022
3/1/2024			26,125.00	26,125.00				-						2/27/2024	26,125.00	2022
9/1/2024	510,000		26,125.00	536,125.00	562,250.00	3,000.00	(16,897.50)	548,352.50	1,690,186.00		1,690,186.00	3.01	33.266%	8/28/2024	536,125.00	2023
3/1/2025			13,375.00	13,375.00				-						2/26/2025	13,375.00	2023
9/1/2025	535,000		13,375.00	548,375.00	561,750.00	3,000.00	(16,897.50)	547,852.50	1,690,186.00		1,690,186.00	3.01	33.236%	8/27/2025	548,375.00	2024
	6,610,000	170,000	4,107,941.67	10,887,941.67	10,887,941.67	59,008.33	(332,364.44)	10,614,585.56	32,113,534.00	-	32,113,534.00				10,322,000.00	

Housing Authority of Meridian
 Capital Funds Housing Revenue Bonds
 Series 2005
 Annual Outflow Analysis

Date	O/S	Interest	Series A	Series B	Total Inflow / Total Outflow
12/31/2005					
12/31/2005	6,780,000				(6,482,675)
9/1/2006	6,780,000	226,942			226,942
9/1/2007	6,560,000	339,000	50,000	170,000	559,000
9/1/2008	6,325,000	328,000	235,000	-	563,000
9/1/2009	6,080,000	316,250	245,000	-	561,250
9/1/2010	5,825,000	304,000	255,000	-	559,000
9/1/2011	5,555,000	291,250	270,000	-	561,250
9/1/2012	5,270,000	277,750	285,000	-	562,750
9/1/2013	4,975,000	263,500	295,000	-	558,500
9/1/2014	4,665,000	248,750	310,000	-	558,750
9/1/2015	4,335,000	233,250	330,000	-	563,250
9/1/2016	3,990,000	216,750	345,000	-	561,750
9/1/2017	3,630,000	199,500	360,000	-	559,500
9/1/2018	3,250,000	181,500	380,000	-	561,500
9/1/2019	2,850,000	162,500	400,000	-	562,500
9/1/2020	2,430,000	142,500	420,000	-	562,500
9/1/2021	1,990,000	121,500	440,000	-	561,500
9/1/2022	1,530,000	99,500	460,000	-	559,500
9/1/2023	1,045,000	76,500	485,000	-	561,500
9/1/2024	535,000	52,250	510,000	-	562,250
9/1/2025	-	26,750	535,000	-	561,750
		4,107,942	6,610,000	170,000	4,405,267
	IRR (Effective Financing Cost)		5.535%		
	NPV (assumes 7% discount rate)		(724,509)		
	Costs of Issuance		297,325		

Rental Term Sheet

The term sheet consists of four sections that are to be filled out by the PHA as part of the Mixed-Finance Proposal and submitted to the HUD Grant Manager for presentation to the Project Review Panel:

- A. Specific Phase Project Summary:** A one-paragraph narrative description of the specific phase for posting on the HUD web site.
- B. Program Overview:** A description of the overall development program, financing, and schedule.
- C. Specific Phase Overview:** A description of the program details for the specific phase under review.
- D. Statement of Business Terms:** A description of the deal terms between the PHA and other parties for the specific phase under review.

A. Specific Phase Project Summary

Purpose: To provide a short summary description of the specific phase under review for posting on HUD's web site. Other PHAs can then review the summary of closed phases to find PHAs with similar deals and can contact those authorities for information, sample documents, etc.

Instructions: Provide a brief narrative that describes the specific phase to be reviewed. Include the following information:

- The overall unit count broken down by unit type (i.e., ACC, LIHTC, ACC/LIHTC, market, etc.);
- Sources of funding;
- The names of the major partners;
- The building type(s) being constructed (e.g., row, detached/semi-detached, walk-up, etc.);
- Any non-residential or mixed uses;
- Any elderly designated units in the phase;
- Any unusual features of the phase (e.g., a land swap, commercial facilities, operating subsidy only units, scattered site acquisition and development, etc.).

<i>Name of PHA:</i>	The Housing Authority of the City of Meridian
<i>Name of Development:</i>	J.T. Davis Courts
<i>HOPE VI Grant No./Development Project No.:</i>	MS26URD004I103
<i>Contact Name:</i>	Derwin Jackson
<i>Contact Phone No.:</i>	(601) 693 - 4285

<p><i>Narrative:</i></p>	<p><i>The Housing Authority of the City of Meridian, Mississippi (MHA) has selected The Michaels Development Company (MDC) to develop the J.T. Davis Courts mixed income community on the former site of a previously distressed public housing development. The buildings that previously housed 78 households have been demolished to clear the land for 72 new family dwelling units in attractive semi-detached twin and triplex structures, open green space and a management office on a site fully integrated into the City's street grid. The unit mix includes 5 low income housing tax credit units, and 67 Public Housing/Low Income Housing Tax Credit (LIHTC) units, that will receive ACC subsidies.</i></p> <p><i>J.T. Davis Courts is an element of the Victory Village FY2003 HOPE VI Revitalization Plan. This element will be financed by a combining the proceeds from an MHA bond issue made possible by the pledging of a portion of the MHA's annual Capital Fund Grant Program (CFP) with HOPE VI funds to make a loan to the Limited Partnership that will own the improvements. These loan proceeds will be combined with the proceeds generated from the sale of 4% Low Income Housing Tax Credits to construct the development. In addition, HOPE VI funds will be utilized for demolition, PHA Administrative and CSS improvements for this off-site element of the Victory Village Revitalization Plan.</i></p> <p><i>Households residing in LIHTC units and the public housing/low income housing tax credit units will be mixed throughout the development. As the exterior facades, interior finishes and amenities of each residential type will be uniform; the appearance of a unit will not reveal the income of its occupants.</i></p> <p><i>The costs of developing J.T. Davis Courts are expected to approximate \$12.9M. The permanent funding for the J.T. Davis Courts development is being derived from the following sources:</i></p> <p><i>HOPE VI Funds \$2,140,984</i></p> <p><i>MHA CFP Bonds \$6,780,000</i></p> <p><i>Federal LIHTC Equity \$3,455,884</i></p> <p><i>HOPE VI Demolition Grant Funds \$555,662</i></p>

B. Program Overview

Purpose of this section: To provide a context for reviewing the overall project.

I. Proposed Unit Mix

Purpose: To provide the unit mix for the overall project so that HUD can evaluate the current phase in context.

Instructions: Complete the Excel spreadsheet **Unit Mix Entire Project** to describe the proposed unit mix for the entire project.

SEE ATTACHED

II. Non-Residential Uses

Purpose: To describe the types of non-residential uses for the overall project so that HUD can evaluate the current phase in context.

Instructions: For each **non-residential** building planned, complete the following table for the overall project.

Building Name/Use(s)	Gross Square Feet	Developer	Owner	Phase
Management Offices-J.T. Davis	660	Michaels Development Company	Davis Associates, L.P.	<i>J.T. Davis Courts</i>
Management Offices/Community Center-Victory Village	6,000	Michaels Development Co.	Victory Associates, L.P.	<i>Victory Village On-Site Rental</i>
Maintenance Facility	10,000	N/A	Meridian Housing Authority	<i>N/A</i>

III. Key Milestones for the Project

Purpose: To ascertain where the PHA is in the development process with regard to its program schedule and the schedule requirements of the Grant Agreement.

Instructions: Complete the following table by listing the dates (actual or anticipated, as appropriate) for the listed project milestones.

Milestone	Date
Effective Date of Grant Agreement (Victory Village)	9/1/04
Date of HUD Approval of the Revitalization Plan or Supplemental Submissions	2/23/05
Residential Construction Start (Element 2 – J.T. Davis)	1/01/06
Residential Construction Completion (Final Phase – Victory On-Site Rental)	10/1/08
Lease-Up (Final Phase)	2/1/09

IV. Project Sources and Uses

Purpose: To provide an overview of the permanent sources and uses for the entire project.

Instructions: Complete the Excel spreadsheet **Exhibit F Entire Project Budget** to describe the projected sources and uses for the entire project, including all rental, homeownership, and nonresidential phases.

C. Specific Phase Overview

Purpose of this section: To provide the information on phase components, budget, and schedule needed to review the business terms for the specific phase under review.

I. Proposed Unit Mix

Purpose: To describe the housing number, type, and bedroom count as required by 24 CFR 941.606(d).

Instructions: Complete the Excel spreadsheet **Unit Mix Phase** to describe the unit mix for the specific phase under review.

II. Non-Residential Uses

Purpose: To describe the types and amounts of non-dwelling space as required by 24 CFR 941.606(d).

Instructions: Complete the following table for the specific phase under review.

Building Name/Use(s)	Gross Square Feet	Developer	Owner
Management Offices-J.T. Davis	660	Michaels Development Company	Davis Associates, L.P.

III. Key Milestones

Purpose: To provide HUD with the status of the phase, to establish the timeline for phase completion, and to identify which party is responsible for each activity for the phase under review.

Instructions: Complete the chart below for the specific phase under review. Indicate whether the activity listed is appropriate for the phase, provide a date for actual or anticipated dates of completion, and check the party responsible for the implementation of the activity. If a box is shaded, it is not applicable and does not need to be completed. Provide any comments in the Activity column.

Activity	Date	Responsible Party
Program Manager under Contract <input checked="" type="checkbox"/> N/A		
Predevelopment Agreement Signed <input checked="" type="checkbox"/> N/A		

Activity	Date	Responsible Party
Development Agreement Signed <input type="checkbox"/> N/A	2/14/05	PHA and Developer
Community and Supportive Services Oversight <input type="checkbox"/> N/A	10/1/04	<input checked="" type="checkbox"/> PHA Staff or Consultants <input type="checkbox"/> Developer <input type="checkbox"/> Other: _____
Site Acquisition Proposal Approval from HUD <input checked="" type="checkbox"/> N/A		<input type="checkbox"/> PHA Staff or Consultants <input type="checkbox"/> Developer <input type="checkbox"/> Other: _____
Acquisition/Site Control <input checked="" type="checkbox"/> N/A		<input type="checkbox"/> PHA Staff or Consultants <input type="checkbox"/> Developer <input type="checkbox"/> Other: _____
Demolition Approval from HUD <input type="checkbox"/> N/A	8/6/03	<input checked="" type="checkbox"/> PHA Staff or Consultants <input type="checkbox"/> Developer <input type="checkbox"/> Other: _____
Disposition Approval from HUD <input type="checkbox"/> N/A	10/15/05	<input checked="" type="checkbox"/> PHA Staff or Consultants <input type="checkbox"/> Developer <input type="checkbox"/> Other: _____
Relocation Plan Approval from HUD <input type="checkbox"/> N/A	8/6/03	<input checked="" type="checkbox"/> PHA Staff or Consultants <input type="checkbox"/> Developer <input type="checkbox"/> Other: _____
Relocation Completion <input type="checkbox"/> N/A	1/27/04	<input checked="" type="checkbox"/> PHA Staff or Consultants <input type="checkbox"/> Developer <input type="checkbox"/> Other: _____
Abatement and Demolition Completion <input type="checkbox"/> N/A	3/29/05	<input checked="" type="checkbox"/> PHA Staff or Consultants <input type="checkbox"/> Developer <input type="checkbox"/> Other: _____
LIHTC Application Submission <input type="checkbox"/> N/A	7/29/05	<input type="checkbox"/> PHA Staff or Consultants <input checked="" type="checkbox"/> Developer <input type="checkbox"/> Other: _____
Award of LIHTC Allocation <input type="checkbox"/> N/A	12/16/05	<input type="checkbox"/> PHA Staff or Consultants <input type="checkbox"/> Developer <input checked="" type="checkbox"/> Other: Mississippi Home Corp.
Environmental Review Approval from HUD and ROF Statement <input type="checkbox"/> N/A	8/6/03	<input checked="" type="checkbox"/> PHA Staff or Consultants <input type="checkbox"/> Developer <input type="checkbox"/> Other: _____
Closing <input type="checkbox"/> N/A	12/28/05	<input checked="" type="checkbox"/> PHA Staff or Consultants <input checked="" type="checkbox"/> Developer <input type="checkbox"/> Other: _____
Infrastructure Construction Start <input checked="" type="checkbox"/> N/A		<input type="checkbox"/> PHA Staff or Consultants <input type="checkbox"/> Developer <input type="checkbox"/> Other: _____
Residential Construction Start <input type="checkbox"/> N/A	01/01/06	<input type="checkbox"/> PHA Staff or Consultants <input checked="" type="checkbox"/> Developer <input type="checkbox"/> Other: _____

Activity	Date	Responsible Party
Residential Construction Completion <input type="checkbox"/> N/A	4/1/07	<input type="checkbox"/> PHA Staff or Consultants <input checked="" type="checkbox"/> Developer <input type="checkbox"/> Other:
Lease-Up <input type="checkbox"/> N/A	7/1/07	<input type="checkbox"/> PHA Staff or Consultants <input type="checkbox"/> Developer <input checked="" type="checkbox"/> Other: Managing Agent

IV. Ownership

Purpose: To provide HUD with a list of the partners of the ownership entity (i.e., general partner, limited partner, special limited partner, etc.) and a description of each role as required by 24 CFR 941.606(a).

Instructions: Complete the following table to list the proposed partners of the ownership entity and to describe their ownership interest and function for the specific phase under review.

Proposed Partner 1:	The Richman Group Affordable Housing Corporation	% Interest:	99.99%
Function(s) Exercised:	Limited Partner - Purchase of Federal Tax Credits		

Proposed Partner 2:	Michaels Davis, LLC	% Interest:	.01%
Function(s) Exercised:	General Partner		

Proposed Partner 3:		% Interest:	
Function(s) Exercised:			

Proposed Partner 4:		% Interest:	
Function(s) Exercised:			

V. Sources and Uses

Purpose: To provide an understanding of the sources and uses as required by 24 CFR 941.606(b) for the specific phase under review. HUD will be evaluating: whether the sources listed are sufficient to build the project, considering timing of sources; which sources are construction (temporary) vs. permanent; the terms of loans; the terms of grants; whether the public housing funds are bearing the appropriate pro rata share; and whether the uses appear reasonable.

Instructions: Complete the Excel spreadsheet **Exhibit F-1 Phase Budget** to describe the sources and uses for the specific phase under review. Complete both permanent and construction sources and uses.

VI. TDC Calculation

Purpose: To determine whether the proposed activities for the phase under review are within HUD’s Total Development Cost Limits. For information on TDC, see Notice PIH 2001-22 and refer to 24 CFR 941.606(g).

Instructions: Complete the Excel spreadsheet **TDC & Instructions** to calculate the TDC for the specific phase under review.

D. Business Terms

Purpose of this section: To evaluate whether the business terms proposed constitute an appropriate use of public funds. HUD will evaluate the costs of the project against its Cost Control and Safe Harbor standards in light of the risks taken by the developer and PHA. To determine whether the phase meets HUD’s cost guidelines and to evaluate the risks associated with the phase, PHAs should refer to the February 23, 2000 Cost Control and Safe Harbor Standards for Rental Mixed-Finance Development. These guidelines are available on the HUD web page at: <http://www.hud.gov/pih/programs/ph/hope6/control.pdf>.

I. Developer Compensation

Instructions: Provide the following information for the net developer fee as defined in the Cost Control and Safe Harbor Standards for the specific phase under review. Express all fee amounts as a percentage of the overall project costs. HUD will verify the stated percentages against the provided sources and uses. If necessary, provide a justification for any term(s) above the HUD Safe Harbor Standards.

Net developer fee for the specific phase under review: 9%

Is the developer receiving any compensation negotiated separately from the developer fee? Yes No

If so, in the following table, list any other tasks for which the Developer is being compensated (e.g., master planning, relocation, CSS, etc.) and the amount of compensation.

Task	Compensation
Not Applicable	\$
	\$
	\$

Justification for Developer Fees above Safe Harbor Standards:

N/A

II. Pay-Out Schedule for Developer Fee/Overhead

Instructions: For the specific phase under review, provide the milestone at which the developer receives compensation (e.g., closing, 50% construction completion, stabilized occupancy) and the percentage of the total developer fee that is to be paid (percentages should total 100%) as defined in the Cost Control and Safe Harbor Standards. If the Developer is being reimbursed for overhead prior to closing, provide a justification in the space below the table and confirm that the compensation is structured as a loan.

Milestone	% of Total Developer Fee
HOPE VI Construction and Permanent Loan Closing	35%
Substantial Completion of Construction	35%
Stabilized Occupancy	30%

Justification for deviating from the Safe Harbor Standard (if applicable):

N/A

Justification for providing a loan to the developer prior to closing (if applicable):

N/A

III. Sharing of Third-Party Predevelopment Costs and Reimbursement Schedule

Instructions: Complete the following table for the specific phase under review. For each of the primary predevelopment costs indicate the percentages to be borne by the PHA and the developer. If necessary, provide a justification for any term(s) above the HUD Safe Harbor Standards.

Estimated Amount of Predevelopment Costs:	\$ 422,765
Length of Predevelopment Period:	7 months
Percentage Borne by PHA:	66 %
Percentage Borne by Developer:	34%

Justification for PHA bearing greater than 75% of the predevelopment costs (if applicable):

Not Applicable, the Meridian Housing Authority is sharing 75%/25% in pre-development expenses incurred except for legal expenses thereby reducing the above reported Percentage Borne by PHA down to an estimated 66%.

IV. Identity of Interest Parties

Instructions: In the table below, disclose whether the Developer has an identity of interest with any party. For each identity of interest party, indicate what steps have been or will be taken to ensure cost competitiveness.

Party	Related Entity?	Cost Control Measures Planned/Completed
Builder/Contractor (waiver required from HUD)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Contractor will be selected through a competitive process.
Property Manager	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Fees will be within the HUD Cost Control and Safe Harbor Standards
Construction Manager	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Investor*	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	An affiliate of the developer shall have the opportunity to bid and match the best syndication proposal
Other (specify):	<input type="checkbox"/> Yes <input type="checkbox"/> No	

*Include both related entities and "preferred" entities.

V. Construction Fees

Instructions: Fill in the following blanks to indicate the amount and percentage for contractor profit, overhead, and general conditions for the specific phase under review. In the space below, describe how any construction savings will be allocated between the PHA and Developer. If necessary, provide a justification for any term(s) above the HUD Safe Harbor Standards.

The amount and percentage for contractor's profit: \$ 322,321 = 6%
 The amount and percentage for contractor's overhead: \$ 107,441 = 2%
 The amount and percentage for contractor's general conditions: \$ 322,321 = 6%

Justification for fees in excess of HUD Safe Harbor Standards (if applicable):

N/A

Methodology for allocating construction savings:

The developer shall be entitled to a bonus payment that is equal to 25% of the Redevelopment Cost Savings, up to a maximum bonus payment equal to 1% of the allowable Development Cost for the relevant fees subject to HUD's Cost Control and Safe Harbor Standards. To the extent that excess funds are available after the bonus payment, the funds will be distributed in accordance with the loan documents.

VI. Property Management Fees

Instructions: Indicate whether the PHA or an outside firm will manage the development. In the table below, check the applicable methodology for determining property management fees and indicate the amount of the proposed fee. Describe the amount of any incentive management fee(s) and the conditions under which they are paid. If necessary, provide a justification for any term(s) above the HUD Safe Harbor Standards.

Who is managing the mixed-finance development? PHA Private firm Joint Venture (PHA/private)

NOTE: A private firm will initially manage the development and will allow MHA to reasonably observe its activities for training purposes, and train the Authority in Tax Credit Compliance.

Method and Amount of Property Management Compensation

- % of effective gross income
- \$ PUM (all units)
- \$ PUM (occupied units) and \$ PUM (vacant units)

Other (specify): 6% of effective gross income, with public housing income adjusted as if rents are equal to tax credit rents of comparable units in the development in accordance with HUD's Cost Control and Safe Harbor Standards

Justification for property management fees in excess of HUD's Safe Harbor Standards, if applicable, supported by a regional market analysis:

N/A

Are there any incentive property management fees? Yes No

If yes, describe:

VII. LIHTC Equity

Instructions: If LIHTC are a funding source for this phase, provide the following information.

What is the amount of the equity raise (cents on the dollar for 10-year allocation): 93¢

Describe the pay-in schedule for the equity:

Milestone/Anticipated Date	Amount
Construction Loan Closing (December 2005)	30%
Receipt of Certificates of Occupancy (April 2007)	55%
Breakeven Operations, Receipt of 8609 and final tax credit cert (October 2007)	15%

VIII. Allocation of Operating Subsidy

Instructions: Indicate which of the following methodologies for allocating operating subsidy from the PHA to the owner entity will be used, and the estimated amount of operating subsidy to be provided on a per-unit per month basis. (For more information on these methodologies, refer to the Mixed-Finance Guidebook, Chapter 5.) In the space below, provide a narrative that describes the methodology for allocating operating subsidy, as required by 24 CFR 941.606(c).

- Pro rata-share (based on number of units and bedroom sizes in phase compared to PHA portfolio overall) \$175.75 PUM
- Budget Based (based on actual gap between operating costs and rental income) \$ PUM
- Negotiated (flat negotiated fee) \$ PUM
- Separate ACC \$ PUM
- Other (describe): \$ PUM

Description of Operating Subsidy Methodology:

It is the general intent that the Development will receive the benefit of operating assistance provided by HUD to the Authority which is attributable to the PHA-Assisted Units, minus an 8% Authority Asset Management Fee. In any Authority Fiscal Year, the Authority shall pay to Owner the lesser of (i) a sum equal to the amount of subsidy which the parties reasonably determine is the amount of Operating Fund assistance received from HUD by the Authority with respect to the PHA-Assisted Units, less an amount to compensate the Authority for its asset management costs or (ii) the amount by which PHA-Assisted Units Expenses exceeds the PHA-Assisted Units Income.

Under current procedures, in order to determine the Operating Subsidy Requirement, the Owner shall provide the Authority with a completed HUD Form 52723 utilizing information specific to the PHA-Assisted Units, except where Authority-wide information is appropriate. The Operating Subsidy Requirement shall be the amount shown on Part F, Line 09, subject to the Authority’s reasonable approval of the Owner’s calculations, less the Authority Asset Management Fee.

The Operating Subsidy shall be paid by the Authority to the Owner an Operating Subsidy Payment equal to one fourth of the annual amount quarterly in advance. The currently anticipated initial Total Expense level is estimated at \$286.08 per unit per month. Based on the current unit mix, the average resident payment is estimated at \$159 per month with an average utility allowance of \$48. Therefore, it is assumed that the average resident will contribute \$110 per month towards their rent and the Authority will contribute approximately \$176 per unit per month initially.

IX. Size and Use of Reserves

Instructions: In the following table, for each of the project reserves indicate its size (as a dollar amount or as a number of months or years of ACC), how the reserve is replenished, the conditions under which it can be accessed, and ownership of the reserve.

NOTE: Public housing funds can not be used for the initial funding of reserves. Submission of the Rental Term Sheet constitutes certification that the reserves are not funded with public housing funds. In addition, HUD expects all reserves that are replenished by public housing funds to remain with the project at the end of the tax-credit compliance period. If this is not the case for any of the reserves (with the exception of the exit tax reserve, which cannot be established or replenished with public housing funds), provide a justification for the alternate reserve ownership where indicated.

Type of Reserve: Affordability Reserve		Size:	\$423,909
How is the reserve capitalized?	Tax Credit Equity will establish this reserve of an estimated three years of operating subsidy in the event that there is a change in appropriations or authorizing law that would keep the MHA from meeting its obligations under the R & O.		
How is the reserve replenished?	The Affordability Reserve may be replenished by the Authority only from funds legally available for such purpose under Public Housing Requirements.		
When can the reserve be accessed?	The funds are available in any quarter that there is a difference between the full Operating Subsidy required under the R & O and the amount actually paid by the MHA. This reserve will also be accessed in the event that the PHA units don't break even during any quarter to the extent needed for the PHA units to break even. The reserve will be kept in a bank account requiring the joint signatures of the MHA and the Owner to withdraw funds.		
Who owns the reserve?	The assets and income from the Reserve are the Limited Partnership's. The Owner will invest the reserve in an interest bearing account. Upon the sale or transfer of the Owner's interest, the balance remaining in the reserve will continue to be available to maintain and preserve the long term affordability of the PHA-Assisted Units.		

Type of Reserve: Initial Operating Period Reserve		Size: \$136,551
How is the reserve capitalized?	Tax Credit Equity will establish this reserve to fund initial operations.	
How is the reserve replenished?	Not Applicable	
When can the reserve be accessed?	An Initial Operating Period Reserve in the amount equivalent to the operating expenses for a six month period is required to be posted by the issuer of the tax credits. Of this amount \$70,652 shall be reserved as the Operating Subsidy Reserve which is the estimated amount of six months of operating subsidy to support operations before the MHA's first payment of Operating Subsidy. The remaining \$65,899 is the Initial Period Reserve to be accessed to fund operating expenses at the beginning of the project's operations.	
Who owns the reserve?	The Limited Partnership.	

Type of Reserve: Operating Deficit Reserve		Size: \$705,000
How is the reserve capitalized?	Tax Credit Equity will establish this reserve that will sustain operations for the 15 year tax credit compliance period.	
How is the reserve replenished?	The funds will be invested in an interest bearing account. To the extent that interest is earned, it will be deposited into this account.	
When can the reserve be accessed?	The Reserve will be accessed when the operating expenses for a period exceed the operating income. This reserve will be available to fund deficits created in the event that the PHA units fail to break even after use of funds from the Affordability Reserve, to the extent permitted, or in the event that the Affordability Reserve is depleted.	
Who owns the reserve?	The Limited Partnership.	

Type of Reserve: Tax and Insurance Escrow		Size: \$9,850.00
How is the reserve capitalized?	Tax Credit Equity	
How is the reserve replenished?	Monthly deposits from the development's operations.	
When can the reserve be accessed?	Upon the receipt of tax and insurance invoices during the normal operations of the development.	
Who owns the reserve?	The Limited Partnership. These funds will be constantly used and replenished.	

Type of Reserve:	Size:
How is the reserve capitalized?	

How is the reserve replenished?	
When can the reserve be accessed?	
Who owns the reserve?	

Provide a justification for any unusual reserve structures, including ownership of the reserves:

X. Cash Flow, Program Income, and Fees to the PHA

Instructions: Answer the following questions in narrative form for the specific phase under review, as appropriate.

After payment of all expenses, how is cash flow distributed?

No cash flow is expected; however, in the event that there is cash flow available, it will be available to repay any operating deficit loans made by the General Partner, pay a priority distribution to the owner, and to pay any deferred developer fee to the General Partner. Once those items are paid, 50% of the remainder will be paid to the PHA as repayment of the loan secured by the Capital Funds. Any remainder will be split 10% to the Investor and 90% to the General Partner.

What are the expected sources of program income (e.g., repayments of loans, PHA development fees, etc.) and what is the PHA’s planned use for this program income?

No income is expected; however, in the event that income is available, the income will be used to replenish the J.T. Davis Affordability Reserve and thereafter to provide additional services to the J.T. Davis Courts residents.

Complete the following table to indicate what fees (e.g., developer fee, asset management fee, property management fee, etc.) are to be paid to the PHA/PHA Affiliate.

Type of Fee/Description	Amount
	\$
	\$
	\$

XI. Additional Information on the Project

Instructions: In narrative form, provide any additional information on the project and business terms of which HUD should be aware when reviewing the terms for this phase. Such issues might include:

- unusual programs or fee structures HUD will need to evaluate;
- justifications for any fees or structures proposed outside of HUD’s Safe Harbor or Cost Control limitations;

- effect of a consent decree on the mixed-finance project;
- market concerns;
- use of Capital Funds as bridge loan; and/or
- Other circumstances that will result in unusual terms or the need for a delayed or accelerated closing.

Narrative on additional project/phase information:

J.T. Davis Courts is the second element of the Victory Village HOPE VI project. This element is to be funded by the issuance of tax exempt bonds by the Meridian Housing Authority secured by no more than 1/3 of the annual Capital Fund Grant Funds received over the next twenty years from HUD. The net proceeds expected to approximate \$5,353,483 will be loaned to Davis Associates, L.P. to finance the project in conjunction with tax credit equity.

Unit Mix and Accessibility Summary, Post-Revitalization

Attachment ms004g01

Step 2. Enter the PHA Name, the Development Name, and Phase Number or Description

Applicant PHA: Housing Authority of the City of Meridian, Mississippi

Development Name and Phase: J.T. Davis Courts (Victroy Village Element 2)



Step 3. Enter the Number of Units (by Structure Type and Unit Size, according to Unit Category and Development Method)

Structure Type	Number of Bedrooms	Rental Unit Categories						Homeownership Unit Categories						
		Public Housing (ACC, w/PHCA or Op-sub-only)			Non-Public Housing (not on ACC, no PHCA used)			Developed with Pub. Housing Capital Assistance			Developed without Pub. Housing Capital Assistance			
		Rehab of Existing Public Housing	New Construction	Acquisition with or without Rehabilitation	Rehab of Existing Public Housing	New Construction	Acquisition with or without Rehabilitation	Rehab of Existing Public Housing	New Construction	Acquisition with or without Rehabilitation	Rehab of Existing Public Housing	New Construction	Acquisition with or without Rehabilitation	
Detached	1	-	-	-	-	-	-	-	-	-	-	-	-	-
	2	-	-	-	-	-	-	-	-	-	-	-	-	-
	3	-	-	-	-	-	-	-	-	-	-	-	-	-
	4	-	-	-	-	-	-	-	-	-	-	-	-	-
	5	-	-	-	-	-	-	-	-	-	-	-	-	-
Semi-Detached	1	-	10	-	-	-	-	-	-	-	-	-	-	-
	2	-	30	-	-	1	-	-	-	-	-	-	-	-
	3	-	19	-	-	2	-	-	-	-	-	-	-	-
	4	-	-	-	-	-	-	-	-	-	-	-	-	-
	5	-	-	-	-	-	-	-	-	-	-	-	-	-
Row House	1	-	-	-	-	-	-	-	-	-	-	-	-	-
	2	-	-	-	-	-	-	-	-	-	-	-	-	-
	3	-	-	-	-	-	-	-	-	-	-	-	-	-
	4	-	-	-	-	-	-	-	-	-	-	-	-	-
	5	-	-	-	-	-	-	-	-	-	-	-	-	-
Walk-Up	0	-	-	-	-	-	-	-	-	-	-	-	-	-
	1	-	4	-	-	-	-	-	-	-	-	-	-	-
	2	-	4	-	-	2	-	-	-	-	-	-	-	-
	3	-	-	-	-	-	-	-	-	-	-	-	-	-
	4	-	-	-	-	-	-	-	-	-	-	-	-	-
Elevator	0	-	-	-	-	-	-	-	-	-	-	-	-	-
	1	-	-	-	-	-	-	-	-	-	-	-	-	-
	2	-	-	-	-	-	-	-	-	-	-	-	-	-
	3	-	-	-	-	-	-	-	-	-	-	-	-	-
	4	-	-	-	-	-	-	-	-	-	-	-	-	-
Totals:	-	67	-	-	5	-	-	-	-	-	-	-	-	-

Step 4. Enter Number of Tax Credit, Market-Rate Rental, and Market-Rate For-Sale Units (for reference: not used in the TDC calculation)

Unit Summary	Total Tax Credit Units: 72		Market (unrestricted) Rental: 0		Market (unrestricted) HO: 0	
	Rehab (of existing PH) Units: -		Rental: 72		PH Rental, + HO w/PHCA (subject to TDC limit): 67	
	New Construction Units: 72		Homeownership: -		Non-PH Rental, + HO w/o PHCA (no TDC limit): 5	
	Acquisition Units: -		Total Units: 72		Total Units: 72	
	Total Units: 72		Total Units: 72		Total Units: 72	

Step 5. Enter number of Special-Needs Units and describe Accessibility Design Features (not used in TDC calculation)

	Summary of Accessibility: Units for Mobility-Impaired and Hearing/Sight-Impaired											
	Rental Unit Categories						Homeownership Unit Categories					
	(on ACC w/PHCA, or Op-sub-only)			Non-Public Housing (not on ACC, no PHCA)			Pub. Housing Capital Assistance			Pub. Housing Capital Assistance		
	Rehab of Existing Pub Hsg	New Const	Acq with or w/o Rehab	Rehab of Existing Pub Hsg	New Const	Acq with or w/o Rehab	Rehab of Existing Pub Hsg	New Const	Acq with or w/o Rehab	Rehab of Existing Pub Hsg	New Const	Acq with or w/o Rehab
Min. Units for Mobility-Impaired	-	4	-	-	-	-	-	-	-	-	-	-
Min. Units, Hearing- or Sight-Impaired	-	2	-	-	-	-	-	-	-	-	-	-
Visitability Features:												

Total Development Cost (TDC) Limit and Housing Construction Cost (HCC) Limit Calculations
Attachment ms004g01

DEVELOPMENT NAME AND PHASE: J.T. Davis Courts (Victroy Village Element 2)

Using TDC/HCC Limits published in Notice PIH 2005-26 for: JACKSON, MISSISSIPPI

Step 3. Unit Mix (Note: enter info on the "Unit Mix" worksheet)					HCC Limits		TDC Limits	
Structure Type	BRs	Rehab of Existing Pub. Hsg.	New Const.	Acq. with or w/o Rehab	(new const. only)	(new const. only)	Per Unit	Phase Totals
					Per Unit	Phase Totals		
Detached/Semi-Detached	1	-	10	-	\$ 61,970	\$ 619,697	\$ 108,447	\$ 1,084,470
	2	-	30	-	\$ 81,639	\$ 2,449,182	\$ 142,869	\$ 4,286,069
	3	-	19	-	\$ 99,118	\$ 1,883,233	\$ 173,456	\$ 3,295,657
	4	-	-	-	\$ 117,249	\$ -	\$ 205,186	\$ -
	5	-	-	-	\$ 128,922	\$ -	\$ 225,613	\$ -
	6	-	-	-	\$ 139,911	\$ -	\$ 244,844	\$ -
Row House	1	-	-	-	\$ 54,428	\$ -	\$ 95,248	\$ -
	2	-	-	-	\$ 70,785	\$ -	\$ 123,874	\$ -
	3	-	-	-	\$ 85,593	\$ -	\$ 149,787	\$ -
	4	-	-	-	\$ 101,019	\$ -	\$ 176,783	\$ -
	5	-	-	-	\$ 110,875	\$ -	\$ 194,032	\$ -
	6	-	-	-	\$ 119,924	\$ -	\$ 209,868	\$ -
Walkup	0	-	-	-	\$ 34,110	\$ -	\$ 59,692	\$ -
	1	-	4	-	\$ 45,781	\$ 183,122	\$ 80,116	\$ 320,464
	2	-	4	-	\$ 58,230	\$ 232,918	\$ 101,902	\$ 407,607
	3	-	-	-	\$ 77,422	\$ -	\$ 135,488	\$ -
	4	-	-	-	\$ 95,675	\$ -	\$ 167,431	\$ -
	5	-	-	-	\$ 107,867	\$ -	\$ 188,768	\$ -
Elevator	6	-	-	-	\$ 119,332	\$ -	\$ 208,830	\$ -
	0	-	-	-	\$ 38,635	\$ -	\$ 61,816	\$ -
	1	-	-	-	\$ 54,089	\$ -	\$ 86,542	\$ -
	2	-	-	-	\$ 69,543	\$ -	\$ 111,268	\$ -
	3	-	-	-	\$ 92,724	\$ -	\$ 148,358	\$ -
	4	-	-	-	\$ 115,905	\$ -	\$ 185,447	\$ -
5	-	-	-	\$ 131,358	\$ -	\$ 210,173	\$ -	
6	-	-	-	\$ 146,812	\$ -	\$ 234,900	\$ -	
					-	67	-	-
					\$	5,368,153	\$	9,394,268

Step 6. Enter Demo & Replacement Units (total, all phases)

Number of public housing units to be demo'd or lost to conversion (total, all phases)	226	(144)	%	of units:	36%	(This portion of demolition cost is excluded from TDC limit)
Number of replacement units built back on the original site (total, all phases)	144							
PH units demolished and not replaced on the original PH site (total, all phases)	82							

Step 7. Enter all Sources of Public Housing Capital Assistance

PH Capital Assistance incl. HOPE VI Revitalization & Demo-only Grants	\$ 2,696,646
Borrowed Funds to be Repaid with Public Housing Capital Assistance	\$ 6,780,000
Total Sources of Public Housing Capital Assistance	\$ 9,476,646

Step 8. Enter All Uses of Public Housing Capital Assistance

	HUD Bdgt	Line Item	
Community and Supportive Services ("CSS" -- for HOPE VI projects only)	1408	\$ 385,289	
Management Improvements, PHA	1408	\$ 257,355	
Administration, PHA	1410	\$ 141,322	
Fees and Costs (planning, prog mgmt, insurance, initial oper deficit, etc.)	1430	\$ 2,445,056	
Site Acq. (cost of sites w/o structures to be retained as housing)	1440	\$ -	
Site Improvement (streets, site improvements and public improvements)	1450	\$ 799,339	
Dwelling Structures, Rehab (cost to rehab existing PH units only)	1460	\$ -	
Dwelling Structures, New Const (w/OH+P, finish landscape + on-site util's)	1460	\$ 4,711,323	
Dwelling Structures, Acquisition (acq. of existing units, + rehab cost)	1460	\$ -	
Dwelling Equip, New Const (for new construction units only)	1465	\$ 102,100	
Dwelling Equip, Rehab or Acq. Units (for existing PH and Acq. units)	1465	\$ -	
Non dwelling Structures (community facilities, social service space, etc.)	1470	\$ 79,200	
Non dwelling Equipment (e.g., vehicles)	1475	\$ -	
Demolition (enter total of all demo & environmental remediation costs)	1485	\$ 525,324	
Relocation (moving expenses, & PHA cost of full-time relo staff)	1495	\$ 30,338	
Total Uses of Public Housing Capital Assistance		\$ 9,476,646	

Excluded Demolition and Abatement Cost Calculation		
Total cost of public housing unit demo & associated env. abatement	\$	525,324
(Minus) demo costs associated with replacement units built on original site	\$	(334,720)
Portion of Demo Excluded as "Additional Project Costs" (% from Step 6)	36%	\$ 190,604

Step 10. Enter Extraordinary Site Cost (exclude if HUD-approved)

Community & Supportive Services ("CSS" -- for HOPE VI projects only)	\$ 385,289
(Minus) Total of "Extraordinary Site Costs" and CSS (excluded from TDC limit)	\$ (575,893)
Total Uses of Public Housing Capital Assistance (subject to TDC Limit)	\$ 8,900,753
As a Percentage of the TDC Limit (from Step 3 above)	\$ 9,394,268

Step 9. Confirm:



Sources = Uses

Total Sources (Step 7) must equal Total Uses (Step 8)

----> Difference: \$0

Okay: Sources = Uses

(± \$5 rounding allowance)

Step 11. Review Results

TDC Limit Analysis:		
Total Development Cost (PH Capital Assistance only)	\$ 8,900,753	as Percentage of TDC Limit
As a Percentage of the TDC Limit (from Step 3 above)	\$ 9,394,268	94.75%
HCC Limit Analysis:		
Housing Construction Cost (PH Capital Assistance only)	\$ 4,813,423	as Percentage of HCC Limit
As a Percentage of the HCC Limit (from Step 3 above)	\$ 5,368,153	89.67%

MS004 LOCCS Debt Service Payment Schedule

LOCCS Payment Date	LOCCS Payment Amount	Target Grant Year Amount	Principal Payment Amount	Interest Payment Amount
03/01/2006	0.00	2005		84750.00
09/01/2006	0.00	2005		169500.00
03/01/2007	0.00	2006		169500.00
09/01/2007	220000.00	2006	220000.00	169500.00
03/01/2008	164000.00	2007		164000.00
09/01/2008	399000.00	2007	235000.00	164000.00
03/01/2009	158125.00	2008		158125.00
09/01/2009	403125.00	2008	245000.00	158125.00
03/01/2010	152000.00	2009		152000.00
09/01/2010	407000.00	2009	255000.00	152000.00
03/01/2011	145625.00	2010		145625.00
09/01/2011	415625.00	2010	270000.00	145625.00
03/01/2012	138875.00	2011		138875.00
09/01/2012	423875.00	2011	285000.00	138875.00
03/01/2013	131750.00	2012		131750.00
09/01/2013	426750.00	2012	295000.00	131750.00
03/01/2014	124375.00	2013		124375.00
09/01/2014	434375.00	2013	310000.00	124375.00
03/01/2015	116625.00	2014		116625.00
09/01/2015	446625.00	2014	330000.00	116625.00
03/01/2016	108375.00	2015		108375.00
09/01/2016	453375.00	2015	345000.00	108375.00
03/01/2017	99750.00	2016		99750.00
09/01/2017	459750.00	2016	360000.00	99750.00
03/01/2018	90750.00	2017		90750.00
09/01/2018	470750.00	2017	380000.00	90750.00
03/01/2019	81250.00	2018		81250.00
09/01/2019	481250.00	2018	400000.00	81250.00
03/01/2020	71250.00	2019		71250.00
09/01/2020	491250.00	2019	420000.00	71250.00
03/01/2021	60750.00	2020		60750.00
09/01/2021	500750.00	2020	440000.00	60750.00
03/01/2022	49750.00	2021		49750.00
09/01/2022	509750.00	2021	460000.00	49750.00
03/01/2023	38250.00	2022		38250.00
09/01/2023	523250.00	2022	485000.00	38250.00
03/01/2024	26125.00	2023		26125.00
09/01/2024	536125.00	2023	510000.00	26125.00
03/01/2025	13375.00	2024		13375.00
09/01/2025	548375.00	2024	535000.00	13375.00
			6780000.00	4135250.00