

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

Portage Metropolitan Housing Authority (OH 031)

PHA Plan

5 Year Plan for Fiscal Years 2008-2012
Annual Plan for Fiscal Year 2008

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

PHA Plan Agency Identification

PHA Name: Portage Metropolitan Housing Authority

PHA Number: OH 031

PHA Fiscal Year Beginning: (mm/yyyy) 01/2008

PHA Programs Administered:

Public Housing and Section 8
 Section 8 Only
 Public Housing Only
 Number of public housing units: **305**
 Number of S8 units:
 Number of public housing units:
 Number of S8 units: **1,770**

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

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

Public Access to Information

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

- Main administrative office of the PHA
- PHA development management offices
- PHA local offices

Display Locations For PHA Plans and Supporting Documents

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

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

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

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

5-YEAR PLAN
PHA FISCAL YEARS 2008 - 2012
[24 CFR Part 903.5]

A. Mission

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

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- The PHA's mission is: **The Portage Metropolitan Housing Authority is dedicated to meeting the housing needs of low-income families and individuals of Portage County by developing, managing and supporting decent affordable housing in partnership with community agencies.**

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: **If HUD makes additional rental vouchers available, it is the intention of PMHA to apply for new allocations of vouchers within the capacity of the agency to properly administer. PMHA Goal : 300 additional vouchers overall.**
- Reduce public housing vacancies: **PMHA will strive to ensure its Public Housing units have as few vacancies as possible, and that turnover of vacant units will take place in a timely fashion. PMHA Goal: 97% occupancy rate with turnover times of 15 days.**
- Leverage private or other public funds to create additional housing opportunities:
- Acquire or build units or developments **PMHA will seek to expand the number of housing units within its inventory, through the acquisition of existing housing and/or the development of new, non-Public**

Housing units. PMHA goal: Add 100 units to PMHA-owned housing inventory

Other (list below)

PHA Goal: Improve the quality of assisted housing

Objectives:

Improve public housing management: (PHAS score) **PMHA seeks to maintain and improve upon its PHAS scores to maintain its high-performer status. PMHA Goal: Maintain and improve upon a 95 PHAS score**

Improve voucher management: (SEMAP score) **PMHA is not scored under the SEMAP evaluation system as a result of Moving to Work participation. However, PMHA seeks to continue improving the Section 8 Program as measured internally under SEMAP indicators. PMHA Goal: Achieve and maintain a SEMAP score of 100 using internal measurements**

Increase customer satisfaction:

Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections) **The major effort for management improvements will fall under the continuing implementation of the asset management scheme required by the Department of Housing and Urban Development. PMHA goal: Successful implementation of all asset management aspects**

Renovate or modernize public housing units: **Public Housing modernization will continue for the next five years, to allow PMHA housing to remain decent, safe and sanitary, as well as attractive to current and prospective tenants. Projects for the next five years are included within the Capital Fund plans.**

Demolish or dispose of obsolete public housing:

Provide replacement public housing:

Provide replacement vouchers:

Other: (list below) **Develop and implement measures of customer satisfaction for Public Housing and Section 8, in light of the lack of recent data under the Public Housing satisfaction surveys and no formal satisfaction surveys for Section 8 participant and landlord satisfactions.**

PHA Goal: Increase assisted housing choices

Objectives:

Provide voucher mobility counseling:

Conduct outreach efforts to potential voucher landlords

Increase voucher payment standards

Implement voucher homeownership program: **PMHA currently operates a voucher homeownership program under the Moving to Work**

Program, and is developing additional means for persons to become a homeowner under the MTW flexibility. PMHA goal: Develop a single-mortgage model for potential homeowners to complement the current method of homeownership.

- Implement public housing or other homeownership programs:
- Implement public housing site-based waiting lists: **PMHA will investigate the desirability of implementing Public Housing site-based waiting lists as a facet of the asset management conversion during the next five years. PMHA goal: Review the viability of site-based waiting lists in 2008. Review or evaluate the viability of site-based waiting lists annually.**
- Convert public housing to vouchers:

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

- PHA Goal: Provide an improved living environment
Objectives:
 - Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
 - Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
 - Implement public housing security improvements:
 - Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
 - Other: (list below) **Although Public Housing developments do not experience marked differences in poverty levels between the various projects, PMHA would like to enhance the mix of higher-income and extremely low income tenants by providing greater incentives for households making economic progress to remain in their current housing, primarily through the implementation of new rent determination policies. PMHA goal: Using Moving to Work authority, reform the rent determination policies in 2008 and evaluate and amend as necessary on an on-going basis.**

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

- PHA Goal: Promote self-sufficiency and asset development of assisted households
Objectives:
 - Increase the number and percentage of employed persons in assisted families:

- Provide or attract supportive services to improve assistance recipients' employability: **Plans include maintaining existing supportive services arrangements with local non-profits, and seeking new grants when available that can support self-sufficiency efforts. PMHA is also seeking to simplify rent determination policies to enable staff to spend more time with self-sufficiency topics and referrals to the Portage Workforce Connection. PMHA goals: Increase the number of partners providing supportive services to residents and participants. PMHA Goal: See an increase in households reporting employment to 65% in five years.**
- Provide or attract supportive services to increase independence for the elderly or families with disabilities. **PMHA has a pending application for a ROSS grant to fund programs for elderly and disabled residents and has developed a plan to attract services for these individuals.**
- 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 promote access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:
 - Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:
 - Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
 - Other: (list below) **PMHA will undertake efforts to promote equal opportunity and fair housing for applicants and program participants through notices that educate on the issue and promote fair housing, offer educational workshops in conjunction with fair housing agency (-ies) for landlords to promote compliance with fair housing laws, and in providing outreach and reporting information for persons who believe they are victims of housing discrimination.**

Other PHA Goals and Objectives: (list below)

**Annual PHA Plan
PHA Fiscal Year 2008**
[24 CFR Part 903.7]

i. Annual Plan Type:

Select which type of Annual Plan the PHA will submit.

Standard Plan

Troubled Agency Plan

ii. Executive Summary of the Annual PHA Plan

[24 CFR Part 903.7 9 (r)]

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

Portage Metropolitan Housing Authority is proposing a significant change in the rent policies of the organization, with the goal of further enhancing and simplifying the self-sufficiency initiatives started under the Moving to Work Demonstration Program. These changes include lowering the charge of percentage of income used to calculate rents, significantly lower ceiling rents for Public Housing units, reducing the number of discretionary allowances for employment and education, increasing allowances and deductions for elderly/disabled persons and dependents and incentives to reward persons with multiple jobs.

The other major initiative ahead of PMHA in 2008 includes the continuing implementation of asset management, particularly in light of inadequate funding provided through federal appropriations. PMHA will continue to evaluate its operations and activities to determine what remaining cost efficiencies can be found while still achieving the standards established by HUD and meeting the needs for quality and affordable housing for Portage County.

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

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

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Attachments

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

Required Attachments:

- A** Admissions Policy for Deconcentration
- B** FY 2008 Capital Fund Program Annual Statement
- NA** Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY) **PMHA is not a troubled housing authority.**
- C** List of Resident Advisory Board Members
- D** List of Resident Board Member
- E** Community Service Description of Implementation
- Information on Pet Policy (**Included as Section 14 below, not as attachment**)
Section 8 Homeownership Capacity Statement, if applicable
- NA** Description of Homeownership Programs, if applicable

Optional Attachments:

- B** FY 2008 Capital Fund Program 5 Year Action Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text) **Included in PHA Plan text**
- Other (List below, providing each attachment name)
- F** Definition of Significant Amendment and Substantial Deviation
- G** Section 8 Homeownership Capacity Statement
- H** Progress Meeting 5-Year Plan Goals

Supporting Documents Available for Review

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	5 Year and Annual Plans
X	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
NA Per Moving to Work	Schedule of flat rents offered at each public housing development <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
NA	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
NA	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
NA	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
NA	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
NA	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the	Annual Plan: Conversion of Public Housing

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	1996 HUD Appropriations Act	
NA	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
X	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
X	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
NA	The most recent Public Housing Drug Elimination Program (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
NA	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

1. Statement of Housing Needs

[24 CFR Part 903.7 9 (a)]

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

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

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford- ability	Supply	Quality	Access- ibility	Size	Loca- tion
Income <= 30% of AMI	4,132	5	5	5	2	3	3
Income >30% but <=50% of AMI	3,021	4	5	5	2	3	3
Income >50% but <80% of AMI	3,704	2	3	4	2	3	3
Elderly	1,875	3	3	3	2	1	3
Families with Disabilities	1,006	3	3	4	4	2	4
African-American	733	4	5	5	2	3	3
Hispanic	95	4	5	5	2	3	3
Race/Ethnicity							
Race/Ethnicity							

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

- Consolidated Plan of the Jurisdiction
Indicate year: 2005
- U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") dataset
- American Housing Survey data
Indicate year:
- Other housing market study
Indicate year:
- Other sources: (list and indicate year of information)
City of Kent Housing Improvement Strategy 2004-2009, Portage County CHIS 2004-2008

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input checked="" type="checkbox"/>	Section 8 tenant-based assistance		
<input type="checkbox"/>	Public Housing		
<input type="checkbox"/>	Combined Section 8 and Public Housing		
<input type="checkbox"/>	Public Housing Site-Based or sub-jurisdictional waiting list (optional)		
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	2,220		261 notified
Extremely low income <=30% AMI	1,941	87.4	
Very low income (>30% but <=50% AMI)	260	11.7	
Low income (>50% but <80% AMI)	19	0.8	
Families with children	1,475	66.4	
Elderly families	69	3.1	
Families with Disabilities	428	19.3	
White	1,457	65.6	
African-American	709	31.9	
Hispanic	17	0.8	
Other Race/Ethnicity	37	1.7	
Characteristics by			

Housing Needs of Families on the Waiting List			
Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)? 10 months (Since October 31, 2006)			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	1,801		1601 notified
Extremely low income <=30% AMI	1,625	90.2	
Very low income (>30% but <=50% AMI)	167	9.3	
Low income (>50% but <80% AMI)	9	0.5	
Families with children	1,508	83.7	
Elderly families	137	7.3	
Families with Disabilities	272	15.1	
White	1,228	68.2	

Housing Needs of Families on the Waiting List			
African-American	539	29.9	
Hispanic	9	0.5	
Other	25	1.4	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	250	13.9	
2 BR	855	47.5	
3 BR	578	32.1	
4 BR	116	6.4	
5 BR	2	0.1	
5+ BR			
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

C. Strategy for Addressing Needs

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

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

Select all that apply

- Employ effective maintenance and management policies to minimize the number of public housing units off-line during unit turnaround
- Reduce turnover time for vacated public housing units
- Reduce time to renovate public housing units
- Seek replacement of public housing units lost to the inventory through mixed finance development
- Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources

- Maintain or increase section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction
- Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- Maintain or increase section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- Maintain or increase section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program
- Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- Other (list below)

Examine the opportunities for acquisition of residential properties for rehabilitation and resale to produce new opportunities for affordable housing and revenue for the agency.

Reduce waiting lists by increasing positive turnover in public housing through the provision of supportive services that lead to economic self-sufficiency.

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select all that apply

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

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

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

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

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

Need: Specific Family Types: Races or ethnicities with disproportionate housing needs

Strategy 1: Increase awareness of PHA resources among families of races and ethnicities with disproportionate needs:

Select if applicable

- Affirmatively market to races/ethnicities shown to have disproportionate housing needs
- Other: (list below)

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

- Counsel section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units
- Market the section 8 program to owners outside of areas of poverty /minority concentrations
- Other: (list below)

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

NEED: Funding and authority to maintain and enhance housing activities

- **Evaluate whether to undertake possible entrepreneurial activities that are permitted under statutory authority, consistent with the PMHA mission and would benefit PMHA residents, the agency and the broader community.**
- **Support industry efforts to obtain regulatory relief and to gain permanent Moving To Work status through agreement and/or legislation.**

(2) Reasons for Selecting Strategies

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

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

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan year.

Note: the table assumes that Federal public housing or tenant based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

**Financial Resources:
Planned Sources and Uses**

Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2008 grants)		
a) Public Housing Operating Fund	\$609,358	
b) Public Housing Capital Fund	\$498,851	
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	\$10,063,333	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants	\$83,200	
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
Mod Rehab	\$1,043,672	Housing
2. Prior Year Federal Grants (unobligated funds only) (list below)		
FSS Coordinator	\$65,447	Salary and benefits
CFP 501-05	\$51,995	Capital projects
CFP 501-06	\$494,488	Capital Projects
CFP 501-07	\$459,937	
3. Public Housing Dwelling Rental Income	\$584,278	Operations
Public Housing excess utilities	\$5,000	Operations
4. Other income (list below)		
Laundry income	\$4,000	Operations
Investment income	\$131,000	Operations
4. Non-federal sources (list below)		
Commerical rental income	\$41,650	Supports learning center operations
Kent rental properties	\$155,500	Property operations
Maintenance Revenue	\$63,000	Property operations
Total resources	\$13,855,858	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.7 9 (c)]

A. Public Housing

Exemptions: PHAs that do not administer public housing are not required to complete subcomponent 3A.

(1) Eligibility

a. When does the PHA verify eligibility for admission to public housing? (select all that apply)

- When families are within a certain number of being offered a unit: **(20-30 households)**
- When families are within a certain time of being offered a unit: **(30-60 days)**
- Other: (describe)

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

- Criminal or Drug-related activity
- Rental history
- Housekeeping
- Other (**Credit Checks**)

c. Yes No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

d. Yes No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

e. Yes No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

(2)Waiting List Organization

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

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

While PMHA plans to continue to utilize a community-wide waiting list for 2008, management expects to evaluate waiting list policy and procedures in light of implementing asset management requirements and enhancing the service to persons seeking housing and the quality of housing management. This evaluation is expected to take place in Fall 2008.

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

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

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

1. How many site-based waiting lists will the PHA operate in the coming year? **0**

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

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

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

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

(3) Assignment

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

- One
- Two
- Three or More

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

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

(4) Admissions Preferences

a. Income targeting:

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

b. Transfer policies:

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

- Emergencies
- Overhoused
- Underhoused
- Medical justification
- Administrative reasons determined by the PHA (e.g., to permit modernization work)
- Resident choice: (**relocation to be closer to jobs, schools and/or day care**)
- Other: (list below)

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

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

Other preference(s) (list below)

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

1 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

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

4. Relationship of preferences to income targeting requirements:

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

(5) Occupancy

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

- The PHA-resident lease
- The PHA’s Admissions and (Continued) Occupancy policy
- PHA briefing seminars or written materials
- Other source (list) **Moving to Work Agreement**

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

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

(6) Deconcentration and Income Mixing

a. Yes No: Did the PHA’s analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing? **The analysis of general occupancy developments indicated that three of the public housing developments were very similar in tenant incomes. One development, Athena Gardens, demonstrated a higher level of income overall than the other developments. Athena Gardens has only 25 units and currently has three residents who are categorized as low-income. PMHA considers the retention of three tenants who are making economic progress a success, and that the small universe of units (25) at the site causes the impact of any one household’s activities to be substantial in percentage terms. Additionally, when any low-income household departs from Public Housing, they are invariably replaced by an extremely low-income household, due to the composition of the agency waiting list. Over half of the residents of Athena Gardens are considered extremely low-income.**

b. Yes No: Did the PHA adopt any changes to its admissions policies based on the results of the required analysis of the need to promote deconcentration of poverty or to assure income mixing? **The statistically higher incomes at Athena Gardens are not caused as a result of admissions policies, but rather the economic progress made by three select families, who have also chosen to remain in Public Housing as “low-income” households. The vast majority of admissions is “extremely low-income” due to waiting list demographics.**

However, PMHA does seek to address the issue of income mixing through application of continued occupancy policies

and self-sufficiency programs. Rent policies are proposed that will create ceiling rents, and lower percentages of income charged for rent for all forms of income and additional income rewards for employed persons. The implementation of ROSS 2006 grant activities include addition of a program coordinator to work directly with families to help guide them into job training programs, educational programs, and ultimately into jobs and job placement organizations.

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

- Adoption of site based waiting lists
If selected, list targeted developments below:
- Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments
If selected, list targeted developments below:
- Employing new admission preferences at targeted developments
If selected, list targeted developments below:
- Other (list policies and developments targeted below)

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

PMHA is proposing changes to rent determination policies as a part of this annual plan process that will further the agency goal of promoting self-sufficiency efforts.

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

- Additional affirmative marketing
- Actions to improve the marketability of certain developments
- Adoption or adjustment of ceiling rents for certain developments
- Adoption of rent incentives to encourage deconcentration of poverty and income-mixing
- Other (list below)
Adoption of rent incentives to encourage self sufficiency and policies to discourage persons who are not disabled nor elderly from not participating in work-related activities.

Assisting family households in planning and implementing plans to increase incomes, through work and improving income results from non-employment sources such as child support collection, TANF participation, disability payments eligibility and other.

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

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

g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower-income families? (select all that apply)

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

B. Section 8

Exemptions: PHAs that do not administer section 8 are not required to complete sub-component 3B. **Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

(1) Eligibility

a. What is the extent of screening conducted by the PHA? (select all that apply)

- Criminal or drug-related activity only to the extent required by law or regulation
 Criminal and drug-related activity, more extensively than required by law or regulation
 More general screening than criminal and drug-related activity (list factors below)
 Other (list below)

b. Yes No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

c. Yes No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

d. Yes No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

e. Indicate what kinds of information you share with prospective landlords? (select all that apply)

- Criminal or drug-related activity

Other (describe below)

(2) Waiting List Organization

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

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

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

- PHA main administrative office
- Other

(3) Search Time

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

If yes, state circumstances below: **Applicants show proof of an active search in the form of a completed landlord contact sheet.**

(4) Admissions Preferences

a. Income targeting

Yes No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the section 8 program to families at or below 30% of median area income? **PMHA expects to exceed federal targeting requirements by having more than 75% of all new admissions to the Section 8 program qualify as at or below 30% of area median income. This result, however, is not caused by targeting or policy deliberate policy decision of the housing authority.**

b. Preferences

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

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

Former Federal preferences

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

Other preferences (select all that apply)

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

1. Homeless referrals- families and individuals (consistent with HUD's occupancy priorities for single individuals) referred from Portage County shelters or transitional housing programs providing written confirmation that they will be receiving follow-up supportive services from the referral agency. Agencies will be limited to two referrals per month.
2. Disabled referrals- mentally and physically disabled individuals and families referred by a Portage County social service agency providing written confirmation that they will be receiving follow-up housing and supportive services from the referral agency. Agencies will be limited to two referrals per month.
3. *Landlord referral of in-place families suffering recent financial setback Families referred by their current landlord because the family has recently lost employment, and intend to staying place. This preference will only be implemented if the PMHA's Section 8 lease-up rate is 97% or below. Each participating landlord will be restricted to a maximum of two referrals per year. **Number 3 cited here is proposed to be eliminated as an admissions preference for 2008.***

In addition, applicants whose names have come to the top of the waiting list, but must postpone acceptance of Section 8 assistance, may be placed back at the top of the waiting list at a later date. This preference is intended to avoid penalizing tenants, who are residing in housing having a rental lease or program component with a specific time limit or expiration date, whose names have risen to the top of the Section 8 waiting list. Frequently, tenants under these circumstances, are not able to utilize the Section 8 subsidy at the time their name appears at the top of the waiting list due to the time commitments they are required to comply with. In order to discourage affected tenants to prematurely terminate their existing housing commitments, if after

notification, the applicants wish to postpone the acceptance of the Section 8 subsidy, they may do so. These tenants would then be given the next available Section 8 subsidy upon completion of their housing commitment. These applicants include those tenants:

- a. Residing in Section 8 Moderate Rehab units who have resided there for less than one year
- b. Residing in group homes or similar supportive, congregate housing and are less than 6 months from being able to live independently
- c. Residing at a supportive services public housing site who have not fulfilled the terms of their family development plan and wish to remain on site until the completion of their plan
- d. Tenants verifying that they are bound by the terms of an existing rental lease until a specific expiration date that is less than 6 months from the date their name appeared at the top of the waiting list

All other Section 8 waiting list households would be ranked by order of date of application, with preference given to the following:

Local residency - Local residents are those who:

- a. live in Portage County, or
- b. are employed in Portage County or are notified that they are hired to work in Portage County

Applicants having only the local residency preference will be selected based on a first-come, first-served basis. Those without any preference will fall after all applicants having the local residency preference. They will also be placed in first-come, first served order, based on date of application.

Ten percent (10%) of each group of applicants selected/notified from the waiting list will be applicants designated as "Other Single".

Ten percent (10%) of each group of applicants selected/notified from the waiting list will be applicants who are out-of-county residents. Out of county residents are those who do not live or work in Portage County.

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

1 Date and Time

Former Federal preferences

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

High rent burden

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in your jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)
Persons with disabilities
Households without children up to 10% of each notification round.

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

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

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

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

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

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

(5) Special Purpose Section 8 Assistance Programs

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

- The Section 8 Administrative Plan
- Briefing sessions and written materials
- Other (**Agency brochures and materials, inter-agency meetings**)

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

- Through published notices
- Other (**Website, when applicable**)

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

The PMHA plans to propose a minimum rent for 2008 that will implement an initial \$25 minimum monthly rent. The minimum rent will increase by \$25 every two years during their tenure in Public Housing. Any qualifying household at the time of implementation would start with a minimum rent of \$25, regardless of how long they have already participated in the program. The minimum rent will be capped to not exceed \$250 per month, which would be attained after 18 years of Public Housing residency. Households with a head of household, co-head of household or spouse who is elderly (62 years of age or older, and/or disabled) will have no minimum rent. Departure or death of the sole elderly or disabled household member will result in the minimum rent requirement being re-instated for remaining household members.

2. Yes No: Has the PHA adopted any discretionary minimum rent hardship exemption policies?

3. If yes to question 2, list these policies below:

Residents would be able to self-certify to a hardship condition for up to 2 months per year. This hardship would provide a waiver for the minimum rent during that period, with no obligation on behalf of the resident household to re-pay the waived amount. The PMHA would provide a three-month hardship for the death of a household member, with no obligation to repay the waived minimum rent. There will be an automatic and indefinite hardship minimum rent exemption for households that have a senior or disabled head of household, co-head or spouse. Households that have an elderly or disabled member who is head of household, co-head or spouse will not be subject to the minimum rent.

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

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

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

PMHA proposes to lower ceiling rents under the Moving to Work proposal to \$450 per month for 1- and 2-bedroom units, \$475 per month for 3-4 bedroom units, regardless of income. Households would be permitted to reside in public housing for as many as 5 years at these amounts, before having their ceiling rent increase to 90% of the HUD Fair Market Rents. Income re-verifications will be biennially for these households. Elderly or disabled households will have no time limit for the \$450/\$475 ceiling rents.

Overall percentage of income amounts for rent calculations will be changed from 30% of adjusted gross income to charging 25% of employment income plus 28% of other forms of income. This schedule reflects the goal of promoting employment income as a means to self-sufficiency as well as reflecting the fact that gross income from employment is subject to different forms of taxation that is not levied upon non-employment forms of income. Rent charged will be the greater of the adjusted income calculation, 10% of gross income, or the minimum rent.

Previous income deductions of \$500 for employment and education activities will be dropped. The allowance for unreimbursed child care will be eliminated. The allowances for unreimbursed medical expenses will be raised from 3% of income to 10% of income. The deduction for dependents will be increased from \$480, up to a maximum of \$960, to \$500, with a maximum of \$1,000. The deduction for senior or disabled adults in the household will be increased from \$400, to \$500 and a household with two or more senior or disabled adults will be allowed up to \$1,000 deduction in rent calculation. A person paying child support may claim an absent

child for the purposes of the dependent deduction in the household, but the household would remain subject to the \$1,000 maximum cited earlier.

A change in employment income resulting in an increase or decrease of \$1,000 in annual income will not be processed until the next annual re-verification.

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

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

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

- For household heads
- For other family members
- For transportation expenses
- For the non-reimbursed medical expenses of non-disabled or non-elderly families
- Other (describe below) **The value of bank assets and the interest therefrom will not be considered in the income calculation for the purposes of calculating rent.**

e. Ceiling rents

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

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

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

- For all developments
- For all general occupancy developments (not elderly or disabled or elderly only)
- For specified general occupancy developments
- For certain parts of developments; e.g., the high-rise portion

- For certain size units; e.g., larger bedroom sizes
- Other (list below)

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

- Market comparability study
- Fair market rents (FMR)
- 95th percentile rents
- 75 percent of operating costs
- 100 percent of operating costs for general occupancy (family) developments
- Operating costs plus debt service
- The “rental value” of the unit
- Other (**The PMHA is establishing a “maximum rent” based on an estimated rental value of the unit with consideration at what rental point residents who are making economic progress choose to leave the unit. This ceiling rent is time limited. When time limits are reached, the ceiling rent will be established at 90% of Fair Market Rents for Portage County. There is no time limit for this higher ceiling rent level.**)

f. Rent re-determinations:

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

- Never
- At family option
- Any time the family experiences an income increase
- Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold) **Income changes from changes in employment of \$1,000 per year or less will be reported, but not experience rent changes until the next income re-verification.**
- Other (list below) **PMHA will process rent adjustments for income decreases that are expected to be 30 days or longer.**

Households paying ceiling rent will undergo rent re-determinations bi-annually. Elderly and disabled households who has 90% or more of their income come from Social Security, SSI or other disability payments, and pensions will have a rent re-determination every two years. The policy regarding elderly and disabled households is not a change, but rather is existing policy.

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

(2) Flat Rents

1. In setting the market-based flat rents, what sources of information did the PHA use to establish comparability? (select all that apply.)
- The section 8 rent reasonableness study of comparable housing
 - Survey of rents listed in local newspaper
 - Survey of similar unassisted units in the neighborhood
 - Other (**As a result of the Moving to Work Agreement and the discretionary authority to establish rent determination amounts, PMHA has chosen to institute maximum rents and is not providing a flat rent option as offered in conventional Public Housing.**)

B. Section 8 Tenant-Based Assistance

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

(1) Payment Standards

Describe the voucher payment standards and policies.

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

- At or above 90% but below 100% of FMR (4 bedroom size)
- 100% of FMR (0-3 bedrooms)
- Above 100% but at or below 110% of FMR
- Above 110% of FMR (if HUD approved; describe circumstances below)

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

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

Other (list below)

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

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

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

- Annually
- Other (list below)

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

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

(2) Minimum Rent

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

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

The PMHA proposes to implement a new minimum rent policy using Moving to Work authority. The minimum rent will apply to all program participants, except for households with a head or co-head of household or spouse that is age 62 or over or is disabled. In these cases, the minimum rent will be waived indefinitely without request for waiver. Documentation for elderly or disabled allowances will satisfy the need for documenting the waiver of minimum rent. The minimum rent for these persons will remain at \$0.

The proposed MTW minimum rent is to establish an initial minimum rent for all non-disabled, non-elderly participants at \$25. Any qualifying household at the time of implementation would start with a minimum rent of \$25, regardless of how long they have already participated in the program. The minimum rent would increase every two years at the re-verification following the second year after implementation

by \$25. The minimum rent would be capped to never exceed \$250, which would take a household over 19 years of program participation to attain. This feature is expected to provide incentive to maintaining employment or other income-producing activities, as well as allowing program participants greater choice in their continuing participation than a time limit feature, which would arbitrarily end the housing assistance regardless of the household's efforts or progress towards self-sufficiency.

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

Overall percentage of income amounts for rent calculations will be changed from 30% of adjusted gross income to charging 25% of employment income plus 28% of other forms of income. This schedule reflects the goal of promoting employment income as a means to self-sufficiency as well as reflecting the fact that gross income from employment is subject to different forms of taxation that is not levied upon non-employment forms of income. Rent charged will be the greater of the adjusted income calculation, 10% of gross income, or the minimum rent.

Previous income deductions of \$500 for employment and education activities will be dropped. The allowance for unreimbursed child care will be eliminated. The allowances for unreimbursed medical expenses will be raised from 3% of income to 10% of income. The deduction for dependents will be increased from \$480, up to a maximum of \$960, to \$500, with a maximum of \$1,000. The deduction for senior or disabled adults in the household will be increased from \$400 to \$500. A person paying child support may claim an absent child for the purposes of the dependent deduction in the household, but the household would remain subject to the \$1,000 maximum cited earlier.

A change in employment income resulting in an increase or decrease of \$1,000 in annual income will not be processed until the next annual re-verification.

The value of bank assets and the interest therefrom will not be considered in the income calculation for the purposes of calculating rent.

5. Operations and Management

[24 CFR Part 903.7 9 (e)]

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

Portage Metropolitan Housing Authority is a high performing PHA and not required to complete this section.

A. PHA Management Structure

Describe the PHA's management structure and organization.

(select one)

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

B. HUD Programs Under PHA Management

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

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing		
Section 8 Vouchers		
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers (list individually)		
Public Housing Drug Elimination Program (PHDEP)		
Other Federal Programs(list individually)		

C. Management and Maintenance Policies

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

- (1) Public Housing Maintenance and Management: (list below)
- (2) Section 8 Management: (list below)

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

Exemptions from component 6: High performing PHAs are not required to complete component 6. Section 8-Only PHAs are exempt from sub-component 6A.

Portage Metropolitan Housing Authority is a high performing PHA and not required to complete this section.

A. Public Housing

1. Yes No: Has the PHA established any written grievance procedures in addition to federal requirements found at 24 CFR Part 966, Subpart B, for residents of public housing?

If yes, list additions to federal requirements below:

2. Which PHA office should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)
- PHA main administrative office
 - PHA development management offices
 - Other (list below)

B. Section 8 Tenant-Based Assistance

1. Yes No: Has the PHA established informal review procedures for applicants to the Section 8 tenant-based assistance program and informal hearing procedures for families assisted by the Section 8 tenant-based assistance program in addition to federal requirements found at 24 CFR 982?

If yes, list additions to federal requirements below:

2. Which PHA office should applicants or assisted families contact to initiate the informal review and informal hearing processes? (select all that apply)
- PHA main administrative office
 - Other (list below)

7. Capital Improvement Needs

[24 CFR Part 903.7 9 (g)]

Exemptions from Component 7: Section 8 only PHAs are not required to complete this component and may skip to Component 8.

A. Capital Fund Activities

Exemptions from sub-component 7A: PHAs that will not participate in the Capital Fund Program may skip to component 7B. All other PHAs must complete 7A as instructed.

(1) Capital Fund Program Annual Statement

Using parts I, II, and III of the Annual Statement for the Capital Fund Program (CFP), identify capital activities the PHA is proposing for the upcoming year to ensure long-term physical and social viability of its public housing developments. This statement can be completed by using the CFP Annual Statement tables provided in the table library at the end of the PHA Plan template **OR**, at the PHA's option, by completing and attaching a properly updated HUD-52837.

Select one:

The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name)

-or-

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

(2) Optional 5-Year Action Plan

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

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

b. If yes to question a, select one:

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

-or-

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

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

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

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

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

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

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

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

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

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

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

While Portage MHA has no plans to demolish or dispose of any public housing during the fiscal year, each property will be reviewed to determine its financial and physical viability, particularly within the changing framework of operation and funding offered under asset management.

2. Activity Description

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

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

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

[24 CFR Part 903.7 9 (i)]

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

1. Yes No: Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will apply for designation for occupancy by only elderly families or

only families with disabilities, or by elderly families and families with disabilities as provided by section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year? (If “No”, skip to component 10. If “yes”, complete one activity description for each development, unless the PHA is eligible to complete a streamlined submission; PHAs completing streamlined submissions may skip to component 10.)

2. Activity Description

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

Designation of Public Housing Activity Description
1a. Development name: Eastowne Manor 1b. Development (project) number: 31-04
2. Designation type: Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA’s Designation Plan <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: (DD/MM/YY)
5. If approved, will this designation constitute a (select one) <input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected: 50 7. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

PMHA would like to consider an application to make Eastowne Manor a designated elderly property during 2008. If the decision is made to pursue elderly designation of this property, PMHA would follow the steps mandated by HUD before completing an application for consideration.

10. Conversion of Public Housing to Tenant-Based Assistance

[24 CFR Part 903.7 9 (j)]

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

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

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

2. Activity Description

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

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

<input type="checkbox"/> Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved:)
<input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved:)
<input type="checkbox"/> Requirements no longer applicable: vacancy rates are less than 10 percent
<input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units
<input type="checkbox"/> Other: (describe below)

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]

A. Public Housing

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

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

2. Activity Description

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

Public Housing Homeownership Activity Description (Complete one for each development affected)
1a. Development name: 1b. Development (project) number:
2. Federal Program authority: <ul style="list-style-type: none"> <input type="checkbox"/> HOPE I <input type="checkbox"/> 5(h) <input type="checkbox"/> Turnkey III <input type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)

3. Application status: (select one) <input type="checkbox"/> Approved; included in the PHA's Homeownership Plan/Program <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: (DD/MM/YYYY)
5. Number of units affected: 6. Coverage of action: (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development

B. Section 8 Tenant Based Assistance

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

2. Program Description: **Portage Metropolitan Housing Authority operates a Section 8 Homeownership Program, but it is authorized under the existing Moving to Work agreement between the US Department of Housing and Urban Development, not under conventional HUD Section 8 Homeownership regulation.**

a. Size of Program

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

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

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

b. PHA-established eligibility criteria

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

If yes, list criteria below:

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (l)]

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

Portage Metropolitan Housing Authority is a high performing PHA and not required to complete this section.

A. PHA Coordination with the Welfare (TANF) Agency

1. Cooperative agreements:

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

If yes, what was the date that agreement was signed? DD/MM/YY

2. Other coordination efforts between the PHA and TANF agency (select all that apply)

- Client referrals
- Information sharing regarding mutual clients (for rent determinations and otherwise)
- Coordinate the provision of specific social and self-sufficiency services and programs to eligible families
- Jointly administer programs
- Partner to administer a HUD Welfare-to-Work voucher program
- Joint administration of other demonstration program
- Other (describe)

B. Services and programs offered to residents and participants

(1) General

a. Self-Sufficiency Policies

Which, if any of the following discretionary policies will the PHA employ to enhance the economic and social self-sufficiency of assisted families in the following areas? (select all that apply)

- Public housing rent determination policies
- Public housing admissions policies
- Section 8 admissions policies
- Preference in admission to section 8 for certain public housing families
- Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA

- b. Yes No: If the PHA is not maintaining the minimum program size required by HUD, does the most recent FSS Action Plan address the steps the PHA plans to take to achieve at least the minimum program size?

If no, list steps the PHA will take below:

C. Welfare Benefit Reductions

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

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

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

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.7 9 (m)]

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

Portage Metropolitan Housing Authority is a high performing PHA and not required to complete this section.

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

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

- High incidence of violent and/or drug-related crime in some or all of the PHA's developments

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

2. What information or data did the PHA used to determine the need for PHA actions to improve safety of residents (select all that apply).

- Safety and security survey of residents
- Analysis of crime statistics over time for crimes committed “in and around” public housing authority
- Analysis of cost trends over time for repair of vandalism and removal of graffiti
- Resident reports
- PHA employee reports
- Police reports
- Demonstrable, quantifiable success with previous or ongoing anticrime/anti drug programs
- Other (describe below)

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

B. Crime and Drug Prevention activities the PHA has undertaken or plans to undertake in the next PHA fiscal year

1. List the crime prevention activities the PHA has undertaken or plans to undertake: (select all that apply)

- Contracting with outside and/or resident organizations for the provision of crime-and/or drug-prevention activities
- Crime Prevention Through Environmental Design
- Activities targeted to at-risk youth, adults, or seniors
- Volunteer Resident Patrol/Block Watchers Program
- Other (describe below)

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

C. Coordination between PHA and the police

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

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

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

D. Additional information as required by PHDEP/PHDEP Plan

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

- Yes No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes No: Has the PHA included the PHDEP Plan for FY 2005 in this PHA Plan?
- Yes No: This PHDEP Plan is an Attachment. (Attachment Filename: ____)

14. PET POLICY

[24 CFR Part 903.7 9 (n)]

Pet Policies (excludes service animals)

Under PMHA's Moving To Work Program, scattered site housing units are intended as a reward for progress toward self-sufficiency. Therefore, to maintain consistency with this strategy, cats and dogs will only be permitted in single-family units only, as cat and dog ownership will serve as an additional incentive for economic progress. Dogs and cats are also eligible at elderly sites. Eligible occupants are limited to one of either species. Residents of these units are required to follow the standard procedures for request and approval of pets.

- All pets must be approved in advance.
- The Property Manager will review the request and issue the approval/denial.
- The pet owner must enter into a Pet Agreement with PMHA.
- *Unit must pass housekeeping inspections in order to obtain or retain a cat or dog*

Registration of Pets

Pets must be registered with the PMHA before they are brought onto the premises. Registration includes certificate signed by a licensed veterinarian or State/local authority

that the pet has received all inoculations required by State or local law, and that the pet has no communicable disease(s) and is pest-free.

Registration must be renewed and will be coordinated with the annual re-certification date, and proof of license and inoculation will be submitted at least 30 days prior to annual reexamination.

Dogs and cats must be sprayed or neutered.

Owners of dogs and cats must provide two color photographs

Execution of a Pet Agreement with the PHA stating that the tenant acknowledges complete responsibility for the care and cleaning of the pet will be required.

Refusal to Register Pets

If the PMHA refuses to register a pet, a written notification will be sent to the pet owner stating the reason for denial. The PMHA will refuse to register a pet if:

- The pet is not a “common household pet” as defined in this policy
- The pet owner fails to provide complete pet registration information
- The pet owner fails to update the registration annually
- The PMHA reasonably determines that the pet owner is unable to keep the pet in compliance with the pet rules and other lease obligations. The pet’s temperament and behavior may be considered as a factor in determining the pet owner’s ability to comply with provisions of the lease

Standards for Pets

No exotic, wild animals or any other animal not permitted by State or Local Laws may be kept by any resident.

The following are NOT considered “common household pets”:

- Domesticated dogs that exceed 25 pounds or 15” at the shoulder (Animals certified to assist persons with disabilities are exempt from this weight limitation.
- Vicious or intimidating pets are not allowed. Dog breeds (including pit bull; rottweiler; /chow; boxer; Doberman and German shepherd) are considered vicious or intimidating breeds and are not allowed.
- Animals who would be allowed to produce offspring for sale
- Wild, feral, or any other animals that are not amendable to routing human handling
- Any poisonous animals of any kind
- Fish in aquariums exceeding 10 gallons in capacity
- Non-human primates
- Animals whose climatologically needs cannot be met in the unaltered environment of the individuals dwelling unit
- Pot-bellied pigs
- Ferrets or other animals whose natural protective mechanism pose a risk of serious bites and/or lacerations to small children
- Hedgehogs or other animals whose protective instincts and natural body armor produce a risk of serious puncture injuries to children
- Chicks, turtles, or other animals that pose a significant risk of salmonella infection to those who handle them
- Pigeons, doves, mynahs, psittacoses, and birds of other species that are hosts to the organisms that cause psittacosis in humans
- Snakes or other kinds of reptiles

Dogs as Pets

- Maximum number: One
- Maximum adult weight: 25 pounds
- Maximum adult height: may not exceed 15" at the shoulder
- Must be housebroken
- Must be sprayed or neutered (unless under 6 months)
- Must have all inoculations
- Must be licensed as specified now or in the future by State law and local ordinance
- *Dog must be restrained when maintenance is to be performed on the unit or an inspection is to be conducted. The tenant must be at home or the dog must be restrained or caged. If not, the repair or inspection will not be performed and the tenant will be charged a \$25 fee. If the same situation occurs a second time, the pet will be taken to the animal shelter and it shall be the responsibility of the tenant to pay to reclaim the dog.*

Cats as Pets

- Maximum number: One
- Must be de-clawed
- Must be spayed or neutered
- Must have all required inoculations
- Must be trained to use a litter box or other waste receptacle
- Must be licensed as specified now or in the future by State law or local ordinance
- Only domestic cats are permitted
- Waterproof and leak proof litter box must be provided. Cardboard boxes are not acceptable.

Pets Permitted In All Units

1. *Allowable Pets*

- *Fish*-maximum aquarium size is 10 gallons, and must be maintained on an approved stand
- *No more than 2 hamsters, gerbils or guinea pigs, provided they are kept in an appropriately sized cage* at all times must have any or all inoculations as specified now or in the future by State law or local ordinance
- *No more than 2 birds, and* must be enclosed in a cage at all times

2. *Restrictions*

- Animals not specifically listed above are prohibited
- *Animals must not threaten health, safety or right of peaceful enjoyment of other tenants or employees*
- *Animals must not be release in the unit, nor confined in a manner that will threaten the safety of others or cause damage to PMHA premises*
- *No more than two types of the pets listed above may be kept in the unit* (exception being, where allowed, residents are limited to either one dog or one cat)

C. Pet Agreement

Residents who have been approved to have a pet must enter a Pet Agreement with the PMHA. Residents will certify, by signing the Pet Agreement that the Resident will adhere to the following rules:

- Agree that the resident is responsible and liable for all damages caused by their pet(s)

- All complaints of cruelty and all dog bites will be referred to animal control or applicable agency for investigation and enforcement
- All common household pets are to be fed inside the apartment. Feeding is not allowed on porches, sidewalks, patios or other outside areas
- Tenants are prohibited from feeding stray animals
- The feeding of stray animals will constitute having a pet without permission of the PMHA
- Residents shall not feed any stray animals; doing so, or keeping stray or unregistered animals, will be considered having a pet without permission
- No animals may be tethered or chained outside or inside the dwelling unit
- When outside the dwelling unit, all pets must be on a leash or in an animal transport enclosure and under the control of a responsible individual
- All fecal matter deposited by the pet must be promptly and completely removed from any common area. Failure to do so will result in a Pet Waste Removal charge of \$25
- All animal waste or litter from litter boxes shall be picked up immediately by the pet owner, disposed of in sealed plastic trash bags, and placed in a trash bin
- Litter boxes shall be stored inside the resident's dwelling unit or in animal enclosures maintained within dwelling units AND must be removed and/or replaced regularly. Failure to do so will result in a Pet Waste Removal charge
- The Resident/Pet Owner shall be responsible for the removal of waste from any animal by placing it in a sealed plastic bag and disposing of it in an outside trash bin immediately
- The resident/pet owner shall take adequate precautions to eliminate any animal or pet odors within or around the unit and to maintain the unit in a sanitary condition at all times
- Mandatory implementation of effective flea control by measures that produce no toxic hazard to children who may come into contact with treated animals
- The right of management to enter dwelling unit when there is evidence that an animal left alone is in danger or distress, or is creating a nuisance
- The right of management to seek impoundment and sheltering of any animal found to be maintained in violation of housing rules, pending resolution of any dispute regarding such violation, at owner's expense. The resident shall be responsible for any impoundment fees, and the PMHA accepts no responsibility for pets so removed.
- That failure to abide by any animal-related requirement or restriction constitutes a violation of the "Resident Obligations" in the resident's Lease Agreement.
- Residents will prevent disturbances by their pets that interfere with the quiet enjoyment of the premises of other residents in their units or in common areas. This includes, but is not limited to, loud or continuous barking, howling, whining, biting, scratching, chirping, or other such activities.
- Resident/Pet Owners shall not alter their units, patio, premises or common areas to create an enclosure for any animal. Installation of pet doors is prohibited.

D. Limitation on Pet Ownership

Animals with fur, such as dogs and cats, will not be permitted in development or portions of development where residents have identified a family member with verified asthma exacerbated by fur or allergies to fur.

E. Designation of Pet-Free Areas

The following areas are designated as no-pet areas: PMHA playgrounds, management offices, community centers or rooms, lobbies and other common areas used by residents for socialization.

F. Pets Temporarily on the Premises

All animals or pets not owned by residents, except for service animals are not allowed on PMHA premises. Residents are prohibited from feeding or harboring stray animals. This rule excludes visiting pet programs sponsored by a humane society other non-profit organization and approved by PMHA.

G. Deposits for Pets

Residents with approved pets (other than cats or dogs) are not required to pay a deposit. Residents with approved dogs or cats must pay a pet deposit of **\$200** for the purpose of defraying all reasonable costs directly attributable to their presence.

CHANGE NOTICE: current PMHA policy states deposit of minimum of \$25 and a maximum of \$150 based on the tenant's monthly rental charge.

The resident will be responsible for all reasonable expenses directly related to the presence of the animal or pet on the premises, including the cost of repairs and replacement in the apartment, and the cost of animal care facilities if needed. These charges are due and payable within 30 days of written notification.

For dogs and cats:

An initial payment of \$50 on or prior to the date the pet is properly registered and brought into the apartment and monthly payments will be paid in an agreed upon amount until the specified deposit has been paid.

The PMHA reserves the right to change or increase the required deposit by amendment to these rules.

The PMHA will refund the Pet Deposit to the tenant, less any damage caused by the pet to the dwelling unit, within a reasonable time after the tenant moves or upon removal of the pet from the unit.

All reasonable expenses incurred by the PMHA as a result of damages directly attributable to the presence of the pet in the development will be the responsibility of the resident, including, but not limited to:

- The cost of repairs and replacements to the resident's dwelling unit
- Fumigation of the dwelling unit
- Common areas of the project, if applicable

The expense of flea de-infestation shall be the responsibility of the resident.

If the tenant is in occupancy when such costs occur, the tenant shall be billed for such costs as a current charge.

If such expenses occur as the result of a move-out inspection, they will be deducted from the pet deposit. The resident will be billed for any amount that exceeds the pet deposit.

Pet deposits are not a part of rent payable by the resident.

H. Pet Area Restrictions

Pets must be maintained within the resident's unit. When outside of the unit (within the building or on the grounds) dogs and cats must be kept on a leash or carried and under the control of the resident or other responsible individual at all times.

A common household pet must be effectively restrained and under the control of a responsible person when passing through a common area, from the street to the apartment, etc.

Pets are not permitted in common areas including lobbies, community rooms and laundry areas excepts for those common areas which are entrances to and exits from the building.

Residents/Pet Owners are not permitted to exercise pets or permit pets to deposit waste on project premises outside of the area designated for such purposes.

I. Pet Care

No dog or cat may be left unattended in any apartment or dwelling for a period in excess of 12 hours. All other animals, excluding fish, may not be left unattended for more than 24 hours.

All residents/pet owners will be responsible for adequate care, nutrition, exercise and medical attention for their pet.

J. Responsible Parties

The resident/pet owner will be required to designate two responsible parties for the care of the pet if the health or safety of the pet is threatened by the death or incapacity of the pet owner, or by other factors that render the pet owner unable to care for the pet.

K. Pet Rule violation Notice

The authorization for a common household pet may be revoked at any time subject to the PMHA's grievance procedure if the pet becomes destructive or a nuisance to others, or if the tenant fails to comply with this policy.

Residents who violate these rules are subject to:

- Mandatory removal of the pet from the premises within 30 days of notice by the PMHA or if for a threat to health and safety, removal within 24 hours of notice.
- Lease termination proceedings.

If a determination is made on objective facts supported by written statements, that a resident/pet owner has violated the Pet rule Policy, written notice will be served.

The Notice will contain a brief statement of the factual basis for the determination and the pet rule(s), which were violated. The notice will also state:

- That the resident/pet owner has 10 days from the effective date of the service of notice to correct the violation or make written request for a meeting to discuss the violation;
- That the resident/pet owner is entitled to be accompanied by another person of his or her choice at the meetings; and
- That the resident/pet owner's failure to correct the violation, request a meeting, or appear at a requested meeting may result in initiation of procedures to terminate the pet owner's tenancy.

L. Notice for Pet Removal

If the resident/pet owner and the PMHA are unable to resolve the violation at the meeting or the pet owner fails to correct the violation in the time period allotted by the PMHA, the PMHA may serve notice to remove the pet.

The Notice will contain:

- A brief statement of the factual basis for the PMHA's determination of the Pet rule that has been violated;
- The requirement that the resident/pet owner must remove the pet within 2 days of the notice; and
- A statement that failure to remove the pet may result in the initiation of termination of tenancy procedures.

M. Termination of Tenancy

The PMHA may initiate procedures for termination of tenancy based on a pet rule violation if:

- The pet owner has failed to remove the pet or correct a pet rule violation within the time period specified
- The pet rule violation is sufficient to begin procedures to terminate tenancy under terms of the lease

N. Pet Removal

If the death or incapacity of the pet owner threatens the health or safety of the pet, or other factors occur that render the owner unable to care for the pet, the situation will be reported to the Responsible Party designated by the resident/pet owner. This includes pets that are poorly cared for or have been left unattended for over 24 hours.

If the responsible party is unwilling or unable to care for the pet, or if the PMHA after reasonable efforts cannot contact the responsible party, the PMHA may contact the appropriate State or local agency and request the removal of the pet, or the PMHA may place the pet in a proper facility for up to 30 days. If there is no other solution at the end of 30 days, the PMHA may donate the pet to a humane society. Cost of this professional care will be borne by the pet owner.

If the pet is removed as a result of any aggressive act on the part of the pet, the pet will not be allowed back on the premises.

O. Emergencies

The PMHA will take all necessary steps to insure that pets that become vicious, display symptoms of severe illness, or demonstrate behavior that constitutes an immediate threat to the health or safety of others, are referred to the appropriate State or Local entity authorized to remove such animals.

If it is necessary for the PMHA to place the pet in a shelter facility, the cost will be the responsibility of the tenant/pet owner.

This Pet Policy will be incorporated by reference into the Dwelling Lease signed by the resident, and therefore, violation of the above Policy will be grounds for termination of the lease.

P. Liability Insurance

Residents are encouraged to purchase liability insurance in conjunction with their standard renter's insurance policy, in order to secure protection from liability claims, should the pet cause property damage or personal injury to another person.

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

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

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

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

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

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

Portage Metropolitan Housing Authority is a high performing PHA and not required to complete this section.

- 1. Yes No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock, including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have **not** been addressed elsewhere in this PHA Plan?
- 2. What types of asset management activities will the PHA undertake? (select all that apply)
 - Not applicable
 - Private management
 - Development-based accounting
 - Comprehensive stock assessment
 - Other: (list below)
- 3. Yes No: Has the PHA included descriptions of asset management activities in the **optional** Public Housing Asset Management Table?

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

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

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

Attached at Attachment (File name)

Provided below:

Meeting of September 10, 2007 at Renaissance Place:

Question was asked about allowing residents to remain at Renaissance Place for longer than two years. Response: PMHA currently allows people to remain in residence at Renaissance Place for more than two years, if they are participating in the PATH transitional housing program successfully. After the PATH term, tenants have been allowed to remain at the development for another two years and access PATH services even if they are not participating in the program.

Question was asked if the proposed changes will make complying with paperwork for residents and staff easier. Response: Rent simplification methods proposed here in this annual plan are expected to make verification processes easier for both participants and staff to understand and explain, while not compromising the integrity of the overall housing programs.

Question asked if income will now be calculated on gross or net incomes. Response: Current policy is that gross income is used for rent calculations. PMHA has no intention of changing policy or asking for a waiver to calculate rents on the basis of net incomes. Adjustments to the percentage charged against employment income for rent are expected to make up some of the inequity between employment income (which has a lower net than gross after taxes) and other forms of income (where gross income generally equals net income).

Meeting of September 12, 2007 at Eastowne Manor

Will minimum rents be applied to seniors? Response: Minimum rents of \$25 are not proposed for seniors and disabled persons.

Related to Capital Plan, will work be done on the patio area to make it more attractive and recreational? Response: An application for a gardening project on the patio is pending.

Residents would be interested in having a computer lab that could be secured and with Internet access in the lobby office. Response: The lobby office is not

available for that purpose, now or in the future. However, the community rooms can accommodate a computer lab and staff will investigate this possibility, either using ROSS funds and/or surplus PMHA computer equipment.

Meeting of September 12, 2007 at Etna House

Concern about medical reimbursements being changed to 10% of income for out-of-pocket medical costs making housing unaffordable. Response: PMHA is willing to consider a hardship implementation to ensure that existing tenants do not get priced out of housing due to rent changes, or to “grand-father” existing tenants out of the policy change and only impose new medical deduction policies on new admissions.

Ceiling rent for one bedroom apartments is already at \$450 and would provide no relief to those tenants. Response: The housing authority can determine if it would like to propose the planned schedule, even if it provides no apparent additional relief to residents of one-bedroom units.

For capital fund purposes, install handrails on stairs where needed and put alarms on emergency doors to discourage people from opening these doors for the purpose of sneaking people into the building. Reduce lighting in the front lobby; lights are on 24 hours a day and create so much heat it causes the AC to come on. Response: Maintenance will be asked to investigate operating procedures that cost money and may be unneeded for resident comfort and safety.

3. In what manner did the PHA address those comments? (select all that apply)
- Considered comments, but determined that no changes to the PHA Plan were necessary.
 - The PHA changed portions of the PHA Plan in response to comments
List changes below:
Clarified in the Plan that there would not be a 5-year time limit on ceiling rents for elderly and disabled households.
 - Other: (list below)

B. Description of Election process for Residents on the PHA Board

- 1. Yes No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)
- 2. Yes No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.) **The resident who serves on the PMHA Board**

is appointed according to the requirements of the Department of the Housing and Urban Development and the Ohio Revised Code. The appointment is made by the City of Kent.

3. Description of Resident Election Process

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

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

b. Eligible candidates: (select one)

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

c. Eligible voters: (select all that apply)

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

C. Statement of Consistency with the Consolidated Plan

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

1. Consolidated Plan jurisdiction: (provide name here) State of Ohio (Consolidated Plan), City of Kent and Portage County (local CHIS)

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

- The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
- The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.

- Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
- **Providing transitional housing at Renaissance Place**
 - **Seek expansion of the use of Section 8 assistance for persons with disabilities**
 - **Continue and expand the current MTW homeownership program for Public Housing and Section 8 tenants**
 - **Continue to meet the needs of large households through the provision of Section 8 assistance**
 - **Expand housing choice for low-income persons by expanding the landlord base willing to lease to voucher holders.**

4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)
- On-going communication with local public officials and non-profit agencies; leadership involvement in the Portage County Housing Services Council, sharing of demographic data; CDBG funding for activities located at Public Housing sites.**

D. Other Information Required by HUD

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

Portage Metropolitan Housing Authority is not assessed under the Resident Satisfaction Survey, as conducted by HUD REAC, due to Moving to Work 50058 technical issues with their database, and the inability to issue surveys to residents. As a result, no Resident Satisfaction survey follow-up is applicable.

E. Attachments

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

ATTACHMENT A. Year 2007 Income De-concentration Analysis

Under the provisions of the Quality Housing and Work Responsibility Act, housing authorities must analyze their public housing for concentrations of poverty in their developments. The following summarizes the results and methodology of PMHA's analysis, using data from March 2007.

Moving To Work Exclusions

The PMHA's Moving To Work program has two objectives that impact upon the income deconcentration goal of the QHWRA. The two MTW objectives that

impact the deconcentration goal include the objectives that call for: a) provision of self-sufficiency supportive services on site at two public housing locations and b) the use of housing with more amenities as an incentive for self-sufficiency.

The first objective involves the provision of services coordinated by PATH at Community Estates and Renaissance Place. The MTW waivers incorporate the PATH program requirement that new admissions under the PATH program at these two sites be restricted to the homeless. Consequently, the in-coming PATH participants are coming from an unstable situation, and frequently, their incomes are lower. Thus, it would be expected that newly admitted tenants at these two developments would have income relatively lower than the incomes for tenants occupying the other PMHA developments.

Secondly, the objective involving the use of more desirable housing as an incentive, involves the deliberate designation of scattered site units for those tenants having higher incomes. In order to reward families' progress toward economic self-sufficiency, the scattered site units are reserved for those families meeting certain criteria, which include meeting a required minimum income level. Thus, over time, as this feature is implemented, the scattered site projects will reflect a higher income level.

Therefore, based on the MTW waivers granted to the PMHA for supportive services and transfers to scattered sites, the following projects will not be covered by the PMHA's annual deconcentration analysis in the future:

31-01 Community Estates 31-02 Scattered site - Rehab
31-15 Renaissance Place 31-10 Scattered site - New construction

Analysis

Two methods were utilized in this analysis of the incomes of residents at the four subject developments:

31-01 Athena Gardens 31-03 Harvest Woods
31-05 Town Square Villas 31-09 Heritage Knolls

The first analysis involved assigning each family to one of three income categories: extremely low-income, very low-income, and low-income. As can be seen on the following table, the majority (73%) of units at these developments fall within the extremely low-income category:

Table I
Income Distribution at Multi-Family Sites
Based on March 2007 Data

Total # of occupied units-110	Extremely Low-Income		Very Low-Income		Low Income		Over Income	
	# Units	Percent	# Units	Percent	#Units	Percent	#	%
Athena Gardens	14	56%	8	32%	3	12%	0	

Harvest Woods	22	79%	6	21%	0	0%	0
Town Square	23	76%	5	17%	2	71%	0
Heritage Knolls	21	77%	5	19%	1	4%	0
Total 2007	80	73%	24	22%	6	5%	0
<i>Total 2006 (110 units)</i>	<i>101</i>	<i>92%</i>	<i>8</i>	<i>7%</i>	<i>0</i>	<i>0%</i>	<i>1 1%</i>

Definition of Income Ranges

Family Size	Extremely Low Income (below 30% median)	Very Low Income (31%-50% median)	Low Income (51%-80% of median)
	(\$)	(\$)	(\$)
1	12,900	21,450	34,350
2	14,700	24,500	39,250
3	16,550	27,600	44,150
4	18,400	30,650	49,050
5	19,850	33,100	56,900
6	21,350	35,500	60,800

Based on 2000 data, 93% of units at these developments fell within the Extremely Low-Income range compared to 64% in 2001; 66% in 2002; 71% in 2003; 74% in 2004; 76% in 2005; 92% in 2006 & 73% in 2007.

The Very Low-Income range comparisons include 34 households in 2001; 27 in 2002; 25 in 2003; 19 in 2004; 20 in 2005, 8 in 2006 & 24 in 2007. There were zero households falling within this category in 2000.

The number of households falling in the Low-Income range steadily increased between 2000 and 2002. In 2000, there were 3 families in this category compared to 7 in 2001 and 10 in April 2002. However, the number decreased to 6 families in 2003, while 2004 showed a gain of 2 families, or a total of 8. 2005 data showed 4 families while 2006 data had zero families listed in this category. A total of 6 families fall within this category for 2007, a substantial increase over the previous year.

A second method of comparison consisted of calculating the average income for each development and then comparing each to the average income for all four developments. Between 2006 and 2007, the average income decreased from \$13,213 to \$12,479. The average 2007 income for all four (\$12,479) served as the basis for the Established Income Range (85%-115%). Based on 2007 data, Athena Gardens falls outside the range. The average income for this site is

\$16,241, which significantly exceeds the average income for all sites, \$12,479. Average incomes are as follows:

2007 Established Income Range

Average income for all sites: \$12,479

<i>Site:</i>	<i>Average Income</i>	<i>Percent of Average</i>
Harvest Drive	\$11,773	94%
Athena Gardens	\$16,241	130%
Townsquare Villas	\$10,975	88%
Heritage Knolls	\$11,037	88%

While Athena Gardens exceeds the established range, the site only has 25 units. One resident comprises 4% of the total. During a typical year, approximately 7-8 Athena Gardens' residents leave public housing. Thus, if those with greater incomes leave, most likely Athena Gardens will fall within the Established Income Range. Additionally, 14 (56%) residents fall within the "Extremely Low-Income" category; 8 (32%) fall within "Very-Low Income" range and 3 (12%) are within the "Low-Income" range. No families are over income.

Each year, an analysis of each PMHA development is undertaken to track Moving-To-Work progress. What was determined as of December 2006, Athena Gardens had the greatest average and median incomes among these four developments, as well as the greatest percentage of minority families (30%).

Conclusion

With the exception of Athena Gardens, the three other PMHA developments fall within the Established Income Range of Average Income - \$12,479 based on 2007 data. Since Athena Gardens has 25 units, this site can easily fall within the range when a few families with higher incomes move. Therefore, the staff recommends that no revisions be made to the public housing admissions policy at this time.

ATTACHMENT B.

2008 Capital Fund Annual Statement and 5-Year Plan

Attachment B is included at the end of this document, From HUD-50075

ATTACHMENT C.

RAB Membership

Norma Higgs	Lillian Orum
Katherine White	Lois Roseling
Ralph Townsend	Essie Ferrell
Cindy Love	Wanda Love
Curtis Heritage	Grace Lengs
Rose Wilkinson	Fran Cooley
Dusty Barker	Florence Davis
Stephanie Story	Brandy Hays
Lisa Murray	Tina Carey
John Carey	Melissa Murphy
Adam Jones	Julia Rielinger
Ashley Hazelton	Lauretta Guy
Denise Frye	Ami Phinney
Shawna Kittinger	Elizabeth Tarnowski
Bernard Belknap	Ruby Malone
Rosemary Ferrell	Virginia Barnosky
Olg Kitzmiller	Sherry Simons
Linda Near	Carolyn McElwain
Maurice Near	Sherrie McVeigh

ATTACHMENT D.

List of Resident Board Member

Teresa Carr, appointed by the Kent City Manager. Term expires October 2011.

ATTACHMENT E.

Community Service Requirement

In order to be eligible for continued occupancy, each adult family member must either (1) contribute eight hours per month of volunteer service (not including political activities), or (2) participate in an economic self-sufficiency program, or (3) perform eight hours per month of combined activities as previously described unless they are exempt from this requirement.

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

Economic Self-Sufficiency Program is any program designed to encourage, assist, train, or facilitate the economic independence of HUD-assisted families or to provide work for such families. These programs include programs for job

training, employment counseling, work placement, basic skills training, education, English proficiency, workfare, financial or household management, apprenticeship, and any program necessary to ready a participant for work (including a substance abuse or mental health treatment program), or other work activities.

Exemptions

The following adult residents are exempt from performing volunteer service or self-sufficiency work activities:

1. Persons 62 years or older
2. Blind or disabled individuals as defined under 216(i) (1) or 1614 of the Social Security Act (42 USC 416(i)(1);1382c), and who certifies that because of this disability she or he is unable to comply with the volunteer service requirements
3. Family members who are the primary caregiver for someone who is blind or disabled as set forth in Paragraph 2 above
4. Family members engaged in work activity at least 16 hours per week

(Based on section 407(d) of the Social Security Act (42 USC 607(d); TANF Definition of Work Activities under the Personal Responsibility and Work opportunity Reconciliation Act of 1006 (PL 104-193) Section 407. Mandatory Work Requirements, Subsection (d); and Ohio Job and Family Service OWF/PRC Guidance Letter No. 53).

Work Activity may be defined as:

- *Employment* means an individual receives compensation for services performed. This includes self-employment. Maximum 30-day exemption period will be allowed between jobs to allow for job seeking activities.
- *Work Experience* means the activity in which individuals work without pay at a job site in a public, private-non-profit, or private-for-profit organization/business in order to gain work experience and training. It may include activities ensuring that participants become familiar with workplace expectations and exhibit work behavior and attitudes necessary to compete successfully in the labor market. WEP may include specific hands-on training. It may include childcare service activities in which a resident provides childcare for another participant's child.
- *Subsidized Employment Program* means the program in which individuals work with pay at job sites in public, private non-profit or private-for-profit organizations in order to gain specific occupational training. In return for hiring the individuals, a subsidy is provided to the employer for a specified period of time.

- *On the Job Training* means a program that combines classroom instruction and paid or unpaid work experience to improve individuals' skill development and assist them in obtaining, retaining, or improving employment.
 - *Job Search and Job-Readiness Activities* means the programs, which assist individuals in acquiring the life skills that are used in obtaining, retaining or improving employment; and those activities to seek and secure employment.
 - *Vocational Education* means a program of education and training with a goal of enabling individuals to obtain employment. Vocational education includes college, technical, vocational or other course work leading toward a degree, certificate, or license. Study time may be included as part of this activity. Students are considered "exempt" between breaks/semesters provided they resume their studies.
 - *Job Skills Training* means a program designed to increase individuals' employability potential. It may include college, technical, vocational or other course work. It may also include activities ensuring that participants become familiar with workplace expectations and exhibit work behavior and attitudes necessary to compete successfully in the labor market. Various types of structured programs would qualify, e.g., rehabilitation services, counseling, personal development, and pre-employment classes. Study time may be included as part of this activity.
 - *Education Related to Employment* means any educational program provided to individuals who do not have a high school diploma or GED. Study time may be included as part of this activity.
 - *Basic Education Activities* means a program provided to individuals who do not possess basic literacy skills whether or not they have obtained a high school diploma or equivalent. Basic education may include high school or equivalent education and adult basic and literacy education. Study time may be included as part of this activity.
 - *Alternative Work Activities* means programs which include parenting classes and life-skills training; participation in a certified alcohol or drug addiction program, receiving counseling or treatment related to the domestic violence, or participating in criminal justice activities against the domestic violence offender; or participating in an education program under which a resident who does not speak English attends English as a second language course.
5. Family members who are exempt from work activity under Part A Title IV of the Social Security Act or under any other State welfare program, including welfare-to-work
 6. Family members receiving assistance, benefits or services under a State program funded under Part A Title IV of the Social Security Act or under any other State welfare program, including Ohio Works First cash assistance and who are in compliance with that program.

7. Family members engaged in related activities in accordance with local, State, Federal regulations or requirements.
8. Family members who gave birth will be exempt for 90 days.

Notification of the Requirement

The Community Service Requirement policy is effective January 1, 2001. Resident notification of the requirement includes:

1. The PMHA will provide written notification of the requirement along with the mailed monthly rent statements to residents of each PMHA household for three months following HUD approval.
2. The monthly PMHA newsletter will include on-going reminders of the requirement.
3. Resident meetings will be held before implementation of the requirement. Residents will be informed of the requirement and have an opportunity to personally ask questions and receive clarification of the requirement.
4. New residents will be informed of the requirement during new-tenant orientation, and will claim exempt/non-exempt status at that time.
5. Residents will be informed that failure to comply with the Volunteer Service Requirement Policy will result in ineligibility for continued occupancy at the time of any subsequent annual reexamination.

Process for Claiming Status As An Exempt Person

Written notification will provide the opportunity for residents to claim and explain an exempt status.

PMHA written notifications of the Community Service Requirement will include a Community Service Requirement (CSR) Status form to be completed, as applicable, for each PMHA household. The CSR Status form must be completed by residents and returned to the PMHA within 30 days of receipt. Residents must identify each adult household member and his/her status as it relates to the requirement.

New residents will be informed of the Community Service Requirement policy and will be required to complete a status form during orientation. Service requirements will become effective immediately upon residency.

Verification of Status

Residents claiming an Exemption Status will be required to provide documentation of such exemption (if not already included in PMHA file

information) within 30 days of receipt of the CSR Status form. Documentation must be provided at the time the CSR Status form is submitted to PMHA.

Residents who do not claim exemption within 30 days of notification of the policy will be classified as "Non-Exempt" residents until exemption status is claimed and verified. Until such time, required compliance time will be:

1. Eight hours of performed activities (Volunteer Service and/or Economic Self-Sufficiency Program) for each 30-day period
2. Two hours of performed activities (Volunteer Service and/or Economic Self-Sufficiency Program) for each full calendar week when exemption status is claimed and verified during the course of a month

Upon receipt of the CSR Status form, Public Housing Staff will notify the family within 10 working days of its determination (Exempt or Non-Exempt) for each affected family member. PMHA will identify family members who are subject to the service requirement, and identify family members who are exempt persons.

In order to complement PMHA Moving-To-Work features, the initial CSR Status form will begin the 12-month period for compliance/violation of the service requirement. At the end of the 12-month period, violation of the service requirement will be grounds for eviction but not for termination of tenancy until the completion of the twelve-month period. A warning notice will be issued to non-compliant residents prior to the initiation of eviction proceedings.

Determination of Changes to Exempt or Non-Exempt Status

When a change in status occurs, family members are required to notify the Public Housing Staff in writing within 10 working days of the change. Within 30 days of receipt of written notification, the Public Housing Staff will provide the family member with a CSR Status form to complete.

1. Family members claiming an "Exempt" status must complete the CSR form and return it to PMHA within 10 working days. The affected family member must provide documentation verifying a change to "Exempt" status. A change in status to "Exempt" will become effective the date the change occurred, provided that written notification of the change was forwarded to PMHA within 10 working days of the change, or exempt status may be acknowledged retroactively based upon staff review and approval.
2. A change in status to "Non-Exempt" will become effective the date the change occurred, thus Volunteer Service and/or Economic Self-Sufficiency Program participation must begin on the date the change occurred.

PMHA Support to Non-Exempt Family Members

In order to support Non-Exempt Family Members in their effort to perform volunteer service and/or participate in economic self-sufficiency programs, the PMHA will generate opportunities for affected residents. Such opportunities include:

1. Lobby Job-Search Lab
2. PMHA sponsored training opportunities with priority for enrollment
3. Assist with the organization of resident training/education opportunities
4. Partnership with Portage Area Transitional Housing (PATH) for the development of volunteer service positions and/or economic self-sufficiency program participation
5. Partnership with PMHA resident councils for the development of volunteer service positions and/or economic self-sufficiency program participation
6. Creation of PMHA-volunteer positions
7. Access to the PMHA Resident Resource Library
8. Coordinate with social service agencies in identifying a list of volunteer community service positions
9. Coordinating with social service agencies in identifying a list of classes/training that promote economic self-sufficiency or prepare a participant for work (such as substance abuse; mental health; parenting or domestic violence prevention)

PMHA will provide time sheets to the family member with detailed instruction for completion. A member of the Public Housing staff will track the family member's progress at least 30 days before annual re-certification and will schedule a meeting with the family member, as needed, to best encourage compliance.

PMHA will comply with non-discrimination and equal opportunity requirements during the implementation of the CSR Policy.

Assuring Resident Compliance

1. Residents determined to be "Non-Exempt" will be required to furnish PMHA with written certification of their service requirements if performed at a location(s) other than PMHA. Residents will be informed of applicable due dates at the time the "Non-Exempt" status is determined by the PMHA.

2. At least 30 days before the end of the twelve-month participation period, the PMHA will review the family's compliance with service requirements and will verify such compliance.
3. The PMHA will retain reasonable documentation of service requirement performance or exemption in residents' files.

Notice of Non-Compliance

When a family member who is required to fulfill a service requirement violates this family obligation, the PMHA will notify the resident of this determination. The PMHA will notify any family found to be in noncompliance of the following:

1. The family member(s) has been determined to be in noncompliance
2. That the determination is subject to the grievance procedure
3. That unless the family member(s) enter into an agreement to comply, eviction proceedings will commence at the end of the 12-month period (beginning with the initial implementation date of the CSR Status form).

The noncompliance will be void if the family provides written assurance satisfactory to the PMHA that the resident or other non-compliant resident no longer resides in the unit.

Opportunity for Cure

The PMHA will offer the family member(s) the opportunity to enter into an agreement *before* the anniversary of the 12 months determination. The agreement will state that the family member(s) agrees to enter into an economic self-sufficiency program or agrees to contribute to volunteer service for as many hours as needed to comply with the requirement over the past 12-month period. The cure will occur over the 12-month period (beginning with the date of the VSR form), and the resident will, at the same time, stay current with the volunteer service requirement. The first hours a resident earns go toward the current commitment until the current year's commitment is made.

Public Housing staff will assist the family member in identifying volunteer opportunities and will track compliance on a quarterly basis.

In order to complement PMHA's Moving-To-Work features, the initial CSR Status form will begin the 12-month period for compliance/violation of the service requirement. At the end of the 12-month period, violation of the service requirement will be grounds for eviction but not for termination of tenancy until

the completion of the twelve-month period. A warning notice will be issued to non-compliant residents prior to the initiation of eviction proceedings.

Prohibition Against Replacement of Agency Employees

In implementing the Community Service Requirement, the PMHA will not replace any PMHA employee(s) when residents perform activities to satisfy the service requirement.

Beginning with November 2005 Annual Re-certifications, all affected household members will be required to certify/re-certify their exempt/non-exempt status, and submit documentation as necessary.

ATTACHMENT F.

Definition of Significant Amendment and Substantial Deviation

Portage Metropolitan Housing Authority considers the following actions or activities to be significant amendments or substantial deviations from the Annual Plan, as approved by the Board and HUD.

- Actions that fundamentally change the PMHA mission statement, goals or objectives
- Actions that fundamentally change PMHA plans and policies in a manner that is inconsistent with the existing mission, goals or objectives and require formal approval of the Board of Commissioners.

ATTACHMENT G.

Section 8 Homeownership Capacity Statement

PMHA does not offer a Section 8 Homeownership Program under the guidance of Section 8(y), and as a result, PMHA does not consider this statement as applicable. However, PMHA has operated a homeownership program for several years, with an established minimum homeowners down payment requirement of at least 3% of the purchase price and at least 1% from the family's personal resources, with the ability to apply community resources in down payment assistance towards the minimum requirements.

ATTACHMENT H.

Progress in Meeting 5-Year Plan Mission and Goals PMHA AGENCY GOALS

1. Efficiently, effectively operate agency-housing programs, while being sensitive to the needs and concerns of participants, landlords, and the community.
2. Respond to local housing needs by developing new affordable housing opportunities for low-income households and improving resource utilization.

3. Enhance the quality of life of the PMHA's residents, with particular emphasis upon promotion of family self-sufficiency.

5 YEAR OBJECTIVES

1. **Efficiently, effectively operate agency housing programs, while being sensitive to the needs and concerns of participants, landlords, and the community.**
 - A. Ensure efficient, effective, responsive Section 8 administration
 1. Achieve and maintain SEMAP High Performer status **Although PMHA is not scored by HUD under the SEMAP assessment, internal use of the indicators demonstrate that PMHA would achieve high performer status under this scoring system.**
 2. Maximize the effectiveness of the program for applicants and participants **Administration of the program has been streamlined to improve customer service responsiveness for participants and landlords. The program achieved full lease up during the year.**
 3. Maximize the efficiency of the program **Implementation of a new computer software package is now making common activities more efficient and decreased the risk of human error causing program difficulties.**
 4. Recruit new landlords **Educational sessions offered to all landlords has increased the visibility of the Section 8 program and broadened the types of housing available through the program.**
 - B. Ensure efficient, effective, responsive public housing administration
 1. Maintain PHAS High Performer status **PHAS high performer status was maintained in 2006**
 2. Maximize the efficiency and effectiveness of housing management **Implementation of asset management has caused major adjustments to be made to common operating procedures and changes in personnel assignments. Public Housing has now assigned and manages properties in asset groups.**
 3. Maximize the efficiency of maintenance **Implementation of a new computer software package is now making common activities more efficient and decreased the risk of human error causing program difficulties.**
 - C. Ensure efficient and accurate financial operations **The 2006 audit showed no audit findings or management report.**
2. **Respond to local housing needs by developing new affordable housing opportunities for low-income households and improving resource utilization**
 - A. Develop affordable housing using HUD and non-HUD sources
 1. Expand the supply of permanent, affordable housing, for the low-to moderate-income population in a variety of geographic areas.

2. Preserve the inventory of privately owned permanent, affordable rental housing for the general low-income population. **PMHA did not acquire any low-income housing, but there were also no conversion actions during 2006-2007 that reduced the number of affordable units.**
 3. Develop affordable housing with supportive services for special needs populations. **No progress made in 2006**
 4. Sponsor homeownership opportunities for current participants as a means to freeing more rental subsidies for use by waiting list households. **Homeownership program continues to provide a path for participants to leave rent rolls, and eventually leave housing aid altogether.**
- B. Use Public Housing and Section 8 resources to meet local identified housing needs
1. Maximize Section 8 lease-up rate. **PMHA achieved a full lease-up for Section 8.**
 2. Monitor Tenant Preference Policy to meet identified housing needs. **PMHA reviews admissions preferences to determine if preferences match community needs and provide proper individual incentives.**
 3. Identify alternative uses for developments having marketing issues. **No alternate uses were identified for developments with leasing problems.**
 4. Analyze alternative programs, uses and financing for Public Housing units. **PMHA considered converting PH units for office space under the asset management system required by HUD, but determined the loss of housing units and decrease in administrative efficiency was too great to warrant such an activity.**

3. Enhance the quality of life of the PMHA's residents, with particular emphasis upon promotion of family self-sufficiency.

- A. Increase self-sufficiency rate in public housing.
1. Ensure policies encourage and support family responsibility. **New rent policies are being developed and are expected to be approved in 2007.**
 2. Encourage on-site supportive services. **A ROSS grant and a City of Kent grant have allowed PMHA to expand supportive services at its public housing properties**
 3. Use housing as an incentive for self-sufficiency progress.
 4. Seek out and pursue appropriate grant opportunities. **PMHA was successful in getting a ROSS Family grant and is pursuing for the first time a ROSS Senior/Disabled grant. PMHA also pursued and obtained a grant to support safety efforts at West Side Apartments**
- B. Increase employment rate of Section 8 and public housing families.
1. Provide incentives for tenants to generate higher income. **Rent policies are being reviewed and recommended for approval that improve incentives for economic progress**
 2. Provide job training and work through PMHA maintenance/construction needs. **Program continues with 2 current participants**
- C. Assist victims of domestic violence, sexual assault and stalking

1. Ensure policies and practices do not discriminate against victims of domestic violence, sexual assault or stalking. **New policies have been adopted to ensure compliance with VAWA requirements.**
2. Promote prevention of domestic violence, sexual assault and stalking. **PMHA provides educational materials and referrals to tenants and participants on the topics of domestic violence and similar criminal activity**
3. Pursue grant opportunities for prevention and outreach to victims of domestic violence living in assisted housing **No grant opportunities were identified in which PMHA was eligible**
4. Refer victims of domestic violence, sexual assault and stalking to appropriate service providers. **Referrals are offered as needed by PMHA staff and on-site supportive service providers.**

PHA Plan Table Library

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

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

Capital Fund Grant Number OH12PO3150108 FFY of Grant Approval: (09/2008)

Original Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	\$16,161
3	1408 Management Improvements	68,305
4	1410 Administration	49,885
5	1411 Audit	2,000
6	1415 Liquidated Damages	
7	1430 Fees and Costs	
8	1440 Site Acquisition	
9	1450 Site Improvement	15,000
10	1460 Dwelling Structures	309,500
11	1465.1 Dwelling Equipment-Nonexpendable	
12	1470 Nondwelling Structures	
13	1475 Nondwelling Equipment	8,000
14	1485 Demolition	
15	1490 Replacement Reserve	
16	1492 Moving to Work Demonstration	30,000
17	1495.1 Relocation Costs	
18	1498 Mod Used for Development	
19	1502 Contingency	
20	Amount of Annual Grant (Sum of lines 2-19)	\$498,851
21	Amount of line 20 Related to LBP Activities	
22	Amount of line 20 Related to Section 504 Compliance	\$6,500
23	Amount of line 20 Related to Security	\$2,000
24	Amount of line 20 Related to Energy Conservation Measures	

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

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

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

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

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

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

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

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

HA Name:						<input checked="" type="checkbox"/> Original	<input type="checkbox"/> Revision No: _____
Portage Metropolitan Housing Authority							
Development Number/Name/Ha-Wide	Year 1 FFY: 2008	Work Statement for Year 2 FFY Grant: 2008 PHA 2009	Work Statement for Year 3 FFY Grant: 2008 PHA 2010	Work Statement for Year 4 FFY Grant: 2008 PHA 2011	Work Statement for year 5 FFY Grant: 2008 PHA 2012		
OH31-01 Athena Gardens		95,000.00	0.00	0.00	0.00		
OH31-01 Community Estates		55,000.00	0.00	90,000.00	0.00		
OH31-02 Scattered Sites		0.00	0.00	0.00	110,000.00		
OH31-03 Ravenna Woods		90,500.00	18,500.00	0.00	0.00		
OH31-04 Eastowne Manor		50,681.00	40,750.00	44,500.00	10,500.00		
OH31-05 Town Square Villas	See	0.00	35,000.00	61,750.00	1,000.00		
OH31-06 Etna House		36,000.00	30,000.00	0.00	0.00		
OH31-09 Heritage Knolls	Annual	0.00	30,000.00	61,750.00	1,000.00		
OH31-10 Ravenna Scattered		0.00	0.00	0.00	0.00		
OH31-11 Washington Group	Statement	0.00	12,500.00	0.00	0.00		
OH31-15 Renaissance/Rehab		0.00	147,500.00	0.00	173,500.00		
		327,181.00	314,250.00	258,000.00	296,000.00		
PHA Wide-Operations		20,202.00	32,466.00	25,452.00	35,000.00		
PHA Wide-Management		71,583.00	74,050.00	76,248.00	78,460.00		
PHA Wide-Administrative		49,885.00	49,885.00	49,885.00	49,885.00		
Audit		2,000.00	2,200.00	2,500.00	2,700.00		
Fees & Costs		1,000.00	1,000.00	1,000.00	1,000.00		
Non-Dwelling Equipment		27,000.00	25,000.00	85,766.00	35,806.00		
CFP Funds for 5-year Plan		498,851.00	498,851.00	498,851.00	498,851.00		

Capital Fund Program F

Part I: Summary

PHA Name Portage Metropolitan Housing Authority		<input checked="" type="checkbox"/> Original 5-Year Plan Revision No:			
Development Number/Name/HA- Wide	Year 1 2008	Work Statement for Year 2 FFY Grant:2008 PHA FY:2009	Work Statement for Year 3 FFY Grant:2008 PHA FY:2010	Work Statement for Year 4 FFY Grant:2008 PHA FY:2011	Work Statement for Year 5 FFY Grant:2008 PHA FY:2012
	Annual Statement				
PHA Wide - Operations		20,202.00	32,446.00	25,452.00	35,000.00
PHA Wide - Management		71,583.00	74,050.00	76,248.00	78,460.00
PHA Wide - Administration		49,885.00	49,885.00	49,885.00	49,885.00
Audit		2,000.00	2,200.00	2,500.00	2,700.00
Fees & Cost		1,000.00	1,000.00	1,000.00	1,000.00
Nondwelling Equipment					
Computers			25,000.00		
Floor Equipment					4,200.00
Public Housing Vehicle		27,000.00			
Resident H/C Van				55,766.00	
Storage Bldg - Office				30,000.00	
Key System					16,606.00
Copier					15,000.00
CFP Funds Listed for 5-year planning					

Replacement Housing
Factor Funds

Capital Fund Program Tables

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages- Work Activities

Activities for Year 1	Activities for year: 2			Activities for Year: 3	
2008	FFY Grant: 2008 PHA FY: 2009			FFY Grant: 2008 PHA FY: 2010	
Development Number/Name	Major Work Categories	Estimated Cost	Development Number/Name	Major Work Categories	
See Annual Statement	OH31-01 Athena Gardens	1450 - SITE IMPROVEMENTS Concrete Sidewalks & Slabs Privacy Fences	40,000.00 55,000.00	OH31-03 Ravenna Woods	1450 - SITE IMPROVEMENTS Install Clean Outs
	OH31-03 Ravenna Woods	Concrete Work Replace Trash Enclosures	45,000.00 10,000.00	OH31-04 Eastowne Manor	Removal of Trees & Stumps
	OH31-03 Ravenna Woods	1460 - DWELLING STRUCTURES Replace Flooring Replace Doors & Thresholds Replace Utility Doors	40,000.00 35,000.00 15,500.00	OH31-05 Town Square Villas	Replace Gas Meters & Lines
	OH31-04 Eastowne Manor	Replace Flooring ADA Bath/Shower & Commode	42,681.00 8,000.00	OH31-15 Renaissance Place	Replace Asphalt Driveway
	OH31-06 Etna House	Replace Flooring	36,000.00		1460 - DWELLING STRUCTURES
	OH31-04 Eastowne Manor	Replace Appliances	37,000.00	OH31-04 Eastowne Manor	Replace Heaters in Vestibule Replace Back Maintenance Doors ADA Shower/Bath/Commode Restore Copula/Gutters/Downs
	OH31-06 Etna House	Replace Appliances	20,000.00	OH31-06 Etna House	Replace Gas Meters & lines
		1465 - DWELLING EQUIPMENT		OH31-09 Heritage Knolls	Replace Gas Meters & lines
				OH31-11 Washington Group Home	Fire System - Smoke Detectors
				OH31-15 Acquisition Rehab	Replace Flooring Replace Furnaces
			OH31-15 Acquisition Rehab	1465 - DWELLING EQUIPMENT Replace Appliances	
Subtotal of Estimated Cost			384,181.00	Subtotal of Estimated Cost	

Capital Fund Program Five-Year Action Plan

Part II: Supporting Pages- Work Activities

Activities for Year 1	Activities for year: 4 FFY Grant: 2008 PHA FY:2011			Activities for Year: 5 FFY Grant: 2008 PHA FY:2012		
2008	Development Number/Name	Major Work Category	Estimated Cost	Development Number/Name	Major Work Category	
See Annual Statement		1450 - SITE IMPROVEMENTS		1450 - SITE IMPROVEMENTS		
				Scattered Site - Elm Street - 227 S. Walnut Street	Drainage Drainage	
			1460 - DWELLING STRUCTURES		1460 - DWELLING STRUCTURES	
	OH31-1 Community Estates	Windows	90,000.00	Scattered Site - Franklin Avenue - Harris Street	Upgrade plumbing Upgrade plumbing	
	OH31-04 Eastowne Manor	Concrete Work ADA Shower/Bath/Commode	35,000.00 9,500.00	- Elm Street - 227 S. Walnut Street	Basement Drainage/Waterproofing Rehab Porches	
	OH31-05 Town Square Villas	Replace Flooring	37,250.00		Replace Tile Flooring Replace Staircase	
	OH31-09 Heritage Knolls	Replace Flooring	37,250.00		Basement Drainage	
				OH31-15 Acquisition Rehab	Rehab entire units (5)	
				OH31-15 Renaissance Place	Windows	
	OH31-05 Town Square Villas	Replace Appliances	24,500.00	OH31-04 Eastowne Manor	ADA Shower/Bath Commode	
	OH31-09 Heritage Knolls	Replace Appliances	24,500.00			
				1470 - NON-DWELLING STRUCTURE		
			Scattered Sites Eastowne Manor Town Square Villas Heritage Knolls	Replace Sheds As Needed Property Sign Property Sign Property Sign		
Total CAP Estimated Cost		258,000.00	Total CAP Estimated Cost			

Estimated Cost
18,500.00
22,250.00
35,000.00
123,000.00
5,000.00
5,500.00
8,000.00
30,000.00
30,000.00
12,500.00
10,500.00
9,000.00
5,000.00
314,250.00

Estimated Cost
5,500.00
5,500.00
4,500.00
4,500.00
12,500.00
23,500.00
5,000.00
18,500.00
5,500.00
75,000.00
98,500.00
9,500.00
25,000.00
1,000.00
1,000.00
1,000.00
296,000.00

Five-Year Action Plan
Part III: Supporting Pages
Management Needs Work Statements
 Capital Funding Program (CFP)

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

OMB Approval No. 2577-0157

Work Statement for Year 1 FFY: 2008	Work Statement for Year: 2 FFY: 2009			Work Statement for Year: 3 FFY: 2010		
	General Description of Major Work Categories	Quantity	Estimated Cost	General Description of Major Work Categories	Quantity	Estimated Cost
See Annual Statement	1406 - OPERATIONS			1406 - OPERATIONS		
	Operating Budget		20,202.00	Operating Budget		32,466.00
	1408 - MANAGEMENT IMPROVEMENTS			1408 - MANAGEMENT IMPROVEMENTS		
	Resident Security		2,500.00	Resident Security		2,500.00
	Resident Job Training Program, Business Development Program		22,583.00	Resident Job Training Program, Business Development Program		23,250.00
	Coordinator of Social Service for Drug Elimination		46,500.00	Coordinator of Social Service for Drug Elimination		48,300.00
	1410 - ADMINISTRATION			1410 - ADMINISTRATION		
	Administration Salaries		35,390.00	Administration Salaries		35,390.00
	Administration Fringes		13,540.00	Administration Fringes		13,540.00
	Advertising		955.00	Advertising		955.00
	1411 - AUDIT			1411 - AUDIT		
	Audit		2,000.00	Audit		2,200.00
	1430 - FESS & COSTS			1430 - FEES & COSTS		
		1,000.00			1,000.00	
1475 - NONDWELLING EQUIPMENT			1475 - NONDWELLING EQUIPMENT			
PMHA Vehicle		27,000.00	Computers		25,000.00	
	Subtotal of Estimated Cost		171,670.00	Subtotal of Estimated Cost		184,601.00

Five-Year Action Plan
Part III: Supporting Pages
Management Needs Work Statements
Capital Funding Program (CFP)

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

OMB Approval No. 2577-0157

Work Statement for Year 1 FFY: 2008	Work Statement for Year: 4 FFY: 2011			Work Statement for Year: 5 FFY: 2012		
	General Description of Major Work Categories	Quantity	Estimated Cost	General Description of Major Work Categories	Quantity	Estimated Cost
See Annual Statement	1406 - OPERATIONS			1406 - OPERATIONS		
	Operating Budget		25,452.00	Operating Budget		35,000.00
	1408 - MANAGEMENT IMPROVEMENTS			1408 - MANAGEMENT IMPROVEMENTS		
	Resident Security		2,500.00	Resident Security		2,500.00
	Resident Job Training Program, Business Development Program		23,948.00	Resident Job Training Program, Business Development Program		24,666.00
	Coordinator of Social Service for Drug Elimination		49,800.00	Coordinator of Social Service for Drug Elimination		51,294.00
	1410 - ADMINISTRATION			1410 - ADMINISTRATION		
	Administration Salaries		35,390.00	Administration Salaries		35,390.00
	Administration Fringes		13,540.00	Administration Fringes		13,540.00
	Advertising		955.00	Advertising		955.00
	1411 - AUDIT			1411 - AUDIT		
	Audit		2,500.00	Audit		2,700.00
	1430 - FEES & COSTS			1430 - FEES & COSTS		
			1,000.00			1,000.00
	1475 - NONDWELLING EQUIPMENT			1475 - NONDWELLING EQUIPMENT		
Handicapped Van - Eastowne/Etna		55,766.00	Site Key System		16,606.00	
Storage Building for PMHA Office		30,000.00	Floor Equipment		4,200.00	
			Copier		15,000.00	
	Subtotal of Estimated Cost		240,851.00	Subtotal of Estimated Cost		202,851.00

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

HA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150108 Capital Fund Program Grant No: 2008 Replacement Housing Factor Grant No. 2008	Federal FY of Grant: 2008
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Original Annual Statement
 Reserve for Disasters/Emergencies
 Revised Annual statement/Revision Number _____
 Performance and Evaluation report for Program Year 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	0.00	0.00	0.00	0.00
2	1406 Operations	16,161.00	0.00	0.00	0.00
3	1408 Management Improvements	68,305.00	0.00	0.00	0.00
4	1410 Administration	49,885.00	0.00	0.00	0.00
5	1411 Audit	2,000.00	0.00	0.00	0.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	0.00	0.00	0.00	0.00
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	15,000.00	0.00	0.00	0.00
10	1460 Dwelling Structures	309,500.00	0.00	0.00	0.00
11	1465.1 Dwelling Equipment - Nonexpendable	0.00	0.00	0.00	0.00
12	1470 Nondwelling Structures	0.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	8,000.00	0.00	0.00	0.00
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	30,000.00	0.00	0.00	0.00
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1501 Collaterization or Debt Service	0.00	0.00	0.00	0.00
20	1502 Contingency	0.00	0.00	0.00	0.00
21	Amount of Annual Grant (Sum of Lines 2-20)	498,851.00	0.00	0.00	0.00
22	Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23	Amount of line 21 Related to Section 504 Compliance	6,500.00	0.00	0.00	0.00
24	Amount of line 21 Related to Security - Soft Costs	2,000.00	0.00	0.00	0.00
25	Amount of line 21 Related to Security - Hard Costs	0.00	0.00	0.00	0.00
26	Amount of line 21 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

, Director September , 2007

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150108 Capital Fnd Program Grant No: 2008 Replacement Housing Factor Grant No: 2008			Federal FY of Grant: 2008			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No. Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA-Wide	Operations	1406		16,161.00	0.00	0.00	0.00	
HA-Wide	Management Improvements	1408						
	Resident Security			2,000.00	0.00			
	Develop Job Training & Business							
	Develop Programs	1408.7		18,000.00	0.00			
	Coordinator of Social Services for Drug Elimination			44,805.00	0.00			
	Administrative/Management Improvements	1408.9		3,500.00				
	Total for Management Improvements			68,305.00	0.00	0.00	0.00	
HA-Wide	Administration	1410						
	a. Salaries	1410.1		35,390.00	0.00			
	b. Fringe Benefits	1410.9		13,540.00	0.00			
	c. Advertising	1410.19		955.00	0.00			
	Total for Administration			49,885.00	0.00	0.00	0.00	
HA-Wide	Fees & Costs	1430						
	a. Architect			0.00	0.00			
	b. Planning Fees			0.00				
	Total for Fees & Costs			0.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Equipment	1475						
	a. Office/Maintenance Equipment			8,000.00	0.00			
	b. Vehicle							
	Total for Nondwelling Equipment			8,000.00	0.00	0.00	0.00	
HA-Wide	Relocation Cost	1495.1		0.00	0.00	0.00	0.00	
HA-Wide	Contingency	1502		0.00	0.00	0.00	0.00	

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150108 Capital Fnd Program Grant No: 2008 Replacement Housing Factor Grant No: 2008			Federal FY of Grant: 2008			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised	Funds Obligated	Funds Expended	
OH31-02 Scattered Sites Marks Avenue	Drainage As Needed Replace Sidewalks and Font Concrete Slabs Total for Site Improvement	1450	All	5,000.00 10,000.00 15,000.00	0.00	0.00	0.00	
OH31-01 Athena Gardens	Repl Kitchen/Cabinets/Counter Tops/Sinks/Faucets Replace Cold Air Returns	1460	25 All	70,000.00 5,000.00				
OH31-01 Community Estates	Repl Kitchen/Cabinets/Counter Tops/Sinks/Faucets Replace cold Air Returns		29 All	82,000.00 7,000.00				
OH31-02 Scattered Sites	Repl Roofs/Gutters/Downspouts/Carpet		As Needed	72,000.00				
220,222,226 & 228 W. Elm St - Kent	Renovation to Bath Rooms Tubs/Surrounds/Vanities/Sinks/Faucets/Floor		4	20,000.00				
4325,4327,4333 & 4339 Marks Ave - Rootstown	Replace All Windows		All	15,000.00				
OH31-03 Ravenna Woods								
OH31-04 Eastowne Manor	Handicapped Bathroom		As Needed	6,500.00				
OH31-05 Town Square Villas	Replace All Shed Doors and Thresholds		All	32,000.00				
OH31-06 Etna House								
OH31-09 Heritage Knolls								
OH31-10 Ravenna Single Homes								
OH31-11 Washington Group Home								
OH31-15 Acquisition Rehab/ Sites								
	Total for Dwelling Structures			309,500.00	0.00	0.00	0.00	
		1465						
		1470						
	Total for No dwelling Structures			0.00	0.00	0.00	0.00	
						0.00	0.00	

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

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
OH31-01 Athena Gardens							
OH31-01 Community Estates							
OH31-02 Scattered Sites							
OH31-03 Ravenna Woods							
OH31-04 Eastowne Manor							
OH31-05 Town Square							
OH31-06 Etna House							
OH31-09 Heritage Knolls							
HA-Wide Physical Improvements							
HA-Wide Mgmt. Impr. Administration Fees & Costs Contingency							

Signature of Executive Director & Date:

X

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

X

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

HA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150104 Capital Fund Program Grant No: 2004 Replacement Housing Factor Grant No. 2004	Federal FY of Grant: 2004
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<input type="checkbox"/> Original Annual Statement	<input type="checkbox"/> Reserve for Disasters/Emergencies	<input type="checkbox"/> Revised Annual statement/Revision Number
<input type="checkbox"/> Performance and Evaluation report for Program Year Ending _____		<input checked="" type="checkbox"/> Final Performance and Evaluation Report 6/30/2007

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds	0.00	0.00	0.00	0.00
2	1406 Operations	56,000.00	56,507.42	56,507.42	56,507.42
3	1408 Management Improvements	88,832.56	90,509.13	90,509.13	90,509.13
4	1410 Administration	56,840.00	53,855.38	53,855.38	53,855.38
5	1411 Audit	1,500.00	1,500.00	1,500.00	1,500.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	1,000.00	2,495.60	2,495.60	2,495.60
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	68,000.00	44,499.00	44,499.00	44,499.00
10	1460 Dwelling Structures	275,500.00	155,173.85	155,173.85	155,173.85
11	1465.1 Dwelling Equipment - Nonexpendable	8,000.00	3,128.00	3,128.00	3,128.00
12	1470 Nondwelling Structures	0.00	95,092.58	95,092.58	95,092.58
13	1475 Nondwelling Equipment	15,000.00	18,855.04	18,855.04	18,855.04
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	0.00	20,000.00	20,000.00	20,000.00
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1501 Collateralization or Debt Service	0.00	0.00	0.00	0.00
20	1502 Contingency	0.00	0.00	0.00	0.00
21	Amount of Annual Grant (Sum of Lines 2-20)	570,672.56	541,616.00	541,616.00	541,616.00
22	Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23	Amount of line 21 Related to Section 504 Compliance	0.00	0.00	0.00	0.00
24	Amount of line 21 Related to Security - Soft Costs	5,000.00	0.00	0.00	0.00
25	Amount of line 21 Related to Security - Hard Costs	0.00	0.00	0.00	0.00
26	Amount of line 21 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

, Director June 30, 2007

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150104 Capital Fnd Program Grant No: 2004 Replacement Housing Factor Grant No: 2004			Federal FY of Grant: 2004			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No. Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA-Wide	Operations	1406		56,000.00	56,507.42	56,507.42	56,507.42	
HA-Wide	Management Improvements	1408						
	Resident Security			5,000.00	2,554.22	2,554.22	2,554.22	
	Develop Job Training & Business							
	Develop Programs			38,000.00	37,506.87	37,506.87	37,506.87	
	Coordinator of Social Services for Drug Elimination			40,832.56	40,832.56	40,832.56	40,832.56	
	Administrative/Management Improvements			5,000.00	9,615.48	9,615.48	9,615.48	
	Total for Management Improvements			88,832.56	90,509.13	90,509.13	90,509.13	
HA-Wide	Administration	1410						
	a. Salaries	1410.1		41,237.00	36,989.55	36,989.55	36,989.55	
	b. Fringe Benefits	1410.9		14,803.00	16,611.94	16,611.94	16,611.94	
	c. Advertising	1410.19		800.00	253.89	253.89	253.89	
	Total for Administration			56,840.00	53,855.38	53,855.38	53,855.38	
HA-Wide	Fees & Costs	1430						
	a. Architect			1,000.00	2,495.60	2,495.60	2,495.60	
	b. Planing Fees							
	Total for Fees & Costs			1,000.00	2,495.60	2,495.60	2,495.60	
HA-Wide	Nondwelling Structures	1470						
	PMHA Office Addition				95,092.58	95,092.58	95,092.58	
	Total for Nondwelling Structures			0.00	95,092.58	95,092.58	95,092.58	
HA-Wide	Nondwelling Equipment	1475						
	a. Office Equipment			15,000.00	18,855.04	18,855.04	18,855.04	
	Total for Nondwelling Equipment			15,000.00	18,855.04	18,855.04	18,855.04	
HA-Wide	Relocation Cost	1495.1		0.00	0.00	0.00	0.00	
HA-Wide	Contingency	1502			0.00	0.00	0.00	

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150104 Capital Fnd Program Grant No: 2004 Replacement Housing Factor Grant No: 2004			Federal FY of Grant: 2004			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised	Funds Obligated	Funds Expended	
		1450						
OH31-01 Athena Gardens	Playground Equipment			17,000.00	14,555.00	14,555.00	14,555.00	
OH31-09 Heritage Knolls	Playground Equipment			17,000.00	15,155.00	15,155.00	15,155.00	
OH31-3 Ravenna Woods	Playground Equipment			17,000.00	14,789.00	14,789.00	14,789.00	
OH31-05 Town Square Villas	Playground Equipment			17,000.00	0.00			
	Total for Site Improvement			68,000.00	44,499.00	44,499.00	44,499.00	
		1460						
OH31-02 Scattered Sites Highland Avenue Garden Court	Complete Renovation Complete Renovation			40,000.00 30,000.00	0.00 0.00 0.00			
OH31-03 Ravenna Woods	Kitchen cabinets, Counter Tops, Sinks, Faucets Replace Siding, Gutters, & Downspouts Replace windows			47,000.00	0.00 90,020.55 65,153.30	90,020.55 65,153.30	90,020.55 65,153.30	
OH31-04 Eastowne Manor	Replace Front Door w/keyless entry Intercom System Trash Compactor			7,000.00 30,000.00 5,000.00	0.00 0.00 0.00			
OH31-05 Town Square Villas	Kitchen cabinets, Counter Tops, Sinks, Faucets			47,000.00	0.00			
OH31-06 Etna House	Intercom System Handrails on both sides of hallways			22,500.00 0.00	0.00			
OH31-09 Heritage Knolls	Kitchen cabinets, Counter Tops, Sinks, Faucets			47,000.00	0.00			
	Total for Dwelling Structures	1460		275,500.00	155,173.85	155,173.85	155,173.85	
OH31-02 Walnut Street	Replace HVAC	1465		8,000.00	3,128.00	3,128.00	3,128.00	
	Total for Dwelling Equipment-Nonexp.			8,000.00	3,128.00	3,128.00	3,128.00	
	Total for Nondwelling Structures	1470						
				0.00	0.00	0.00	0.00	
					0.00	0.00	0.00	

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

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
OH31-01 Athena Gardens	09/30/05		12/31/05	06/30/06		12/31/05	
OH31-01 Community Estates							
OH31-02 Scattered Sites 227 S. Walnut	06/30/05		09/30/05	12/31/05		12/31/05	
OH31-03 Ravenna Woods	09/30/05		06/30/05	06/30/06		12/31/05	
OH31-04 Eastowne Manor							
OH31-05 Town Square							
OH31-06 Etna House							
OH31-09 Heritage Knolls							
HA-Wide Physical Improvements	03/31/05			06/30/05		06/30/07	
HA-Wide Mgmt. Impr.	09/30/05			06/30/06		06/30/07	
Administration	09/30/05			06/30/06		06/30/07	
Fees & Costs	09/30/05			06/30/06		06/30/07	
Contingency							

Signature of Executive Director & Date:

Director, August 20, 2004

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

X

Comprehensive Grant Program (CGP) Part III: Implementation Schedule

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

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

X

X

Annual Statement/Performance and Evaluation Report
 Comprehensive Grant Program (CGP) **Part III: Implementation Schedule**

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

OMB Approval No. 2577-0157
 (exp. 7/31/98)

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	

Signature of Executive Director & Date:

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

X

X

(1) To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

(2) To be completed for the Performance and Evaluation Report.

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

HA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150105 Capital Fund Program Grant No: 2005 Replacement Housing Factor Grant No. 2005	Federal FY of Grant: 2005
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Original Annual Statement
 Reserve for Disasters/Emergencies
 Revised Annual statement/Revision Number _____
 Performance and Evaluation report for Program Year Ending 6/30/2007
 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	0.00	0.00	0.00	0.00
2	1406 Operations	60,000.00	72,569.98	72,569.98	72,569.98
3	1408 Management Improvements	89,475.00	92,050.00	60,671.80	60,671.80
4	1410 Administration	54,161.00	51,995.00	9,949.25	9,949.25
5	1411 Audit	2,000.00	2,000.00	2,000.00	2,000.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	1,000.00	1,000.00	173.97	173.97
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	40,000.00	27,230.00	27,230.00	27,230.00
10	1460 Dwelling Structures	238,350.00	179,710.02	65,721.82	15,857.72
11	1465.1 Dwelling Equipment - Nonexpendable	0.00	22,400.00	0.00	0.00
12	1470 Nondwelling Structures	0.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	36,000.00	36,000.00	28,721.80	28,721.80
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	8,630.00	35,000.00	35,000.00	35,000.00
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1501 Collateralization or Debt Service	0.00	0.00	0.00	0.00
20	1502 Contingency	12,000.00	0.00	0.00	0.00
21	Amount of Annual Grant (Sum of Lines 2-20)	541,616.00	519,955.00	302,038.62	252,174.52
22	Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23	Amount of line 21 Related to Section 504 Compliance	42,500.00	0.00	0.00	0.00
24	Amount of line 21 Related to Security - Soft Costs	5,050.00	0.00	0.00	0.00
25	Amount of line 21 Related to Security - Hard Costs	0.00	0.00	0.00	0.00
26	Amount of line 21 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

NOTE: don't process until we know correct price for keyless entry
 _____, Director June 30, 2007

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150105 Capital Fnd Program Grant No: 2005 Replacement Housing Factor Grant No: 2005			Federal FY of Grant: 2005			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No. Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA-Wide	Operations	1406		60,000.00	72,569.98	72,569.98	72,569.98	
HA-Wide	Management Improvements	1408						
	Resident Security			5,050.00	5,050.00	2,896.93	2,896.93	
	Develop Job Training & Business							
	Develop Programs			39,704.00	40,000.00	14,133.25	14,133.25	
	Coordinator of Social Services for Drug Elimination			39,721.00	42,000.00	42,000.00	42,000.00	
	Administrative/Management Improvements			5,000.00	5,000.00	1,641.62	1,641.62	
	Total for Management Improvements			89,475.00	92,050.00	60,671.80	60,671.80	
HA-Wide	Administration	1410						
	a. Salaries	1410.1		37,000.00	35,040.00	6,552.04	6,552.04	
	b. Fringe Benefits	1410.9		16,650.00	16,000.00	3,015.29	3,015.29	
	c. Advertising	1410.19		511.00	955.00	381.92	381.92	
	Total for Administration			54,161.00	51,995.00	9,949.25	9,949.25	
HA-Wide	Fees & Costs	1430						
	a. Architect			500.00	500.00	173.97	173.97	
	b. Planing Fees			500.00	500.00	0.00	0.00	
	Total for Fees & Costs			1,000.00	1,000.00	173.97	173.97	
HA-Wide	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Equipment	1475						
	a. Office Equipment/Maintenance Equipment			12,000.00	21,531.20	14,253.00	14,253.00	
	b. Vehicle			24,000.00	14,468.80	14,468.80	14,468.80	
	Total for Nondwelling Equipment			36,000.00	36,000.00	28,721.80	28,721.80	
HA-Wide	Relocation Cost	1495.1		0.00	0.00	0.00	0.00	
HA-Wide	Contingency	1502		12,000.00	0.00	0.00	0.00	

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150105 Capital Fnd Program Grant No: 2005 Replacement Housing Factor Grant No: 2005			Federal FY of Grant: 2005			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised	Funds Obligated	Funds Expended	
		1450						
OH31-03 Ravenna Woods	Remove Trees			15,000.00	6,205.00	6,205.00	6,205.00	
	Downspout Drainage			25,000.00	15,050.00	15,050.00	15,050.00	
	View Drainage Line w/camera				285.00	285.00	285.00	
OH31-02 St Rt 183	Replace Drainage at rear of unit				2,340.00	2,340.00	2,340.00	
	Replace Concrete from Drainage Repair				3,350.00	3,350.00	3,350.00	
	Total for Site Improvement			40,000.00	27,230.00	27,230.00	27,230.00	
		1460						
Athena Gardens	Replace Circuit Boxes		all	15,000.00	18,393.09	11,625.00		
Community Estates	Replace Smoke Detectors		all	8,500.00	4,000.00			
	Replace Circuit Boxes		all	17,500.00	12,215.00	11,625.00		
	Replace Smoke Detectors		all	9,000.00	4,500.00			
OH31-02 Scattered Site St Rt 183	Rehab to exterior /New Baseboard Heaters		2	11,500.00	19,195.02	15,457.72	15,457.72	
	Patio Doors/Deck/Siding/Foundation Sealing		2					
	Gutters and Downspouts		all		400.00	400.00	400.00	
	Replace Roof		all		8,000.00			
OH31-03 Ravenna Woods	Replace Siding/Stain/Gutters & Downspouts		all	50,000.00	0.00			
	Replace Circuit Boxes		28	16,800.00	16,800.00	11,625.00		
	Replace Smoke Detectors		all	10,000.00	10,000.00			
OH31-04 Eastowne Manor	Replace Tub w/Handicapped Shower		2	14,000.00	7,600.00			
	Replace Smoke Detectors		all	16,000.00	10,000.00			
	Keyless Entry			6,000.00	3,742.81			Moved-up
OH31-05 Town Square Villas	Replace Smoke Detectors		all	10,500.00	8,000.00			
	Replace Circuit Boxes		30	18,000.00	24,000.00	11,625.00		
OH31-06 Etna House	Replace Smoke Detectors		all	6,500.00	0.00			
	Keyless Entry				5,000.00			
					3,364.10	3,364.10		Moved-up
OH31-09 Heritage Knolls	Replace Smoke Detectors		all	10,200.00	9,500.00			
OH31-11 Washington Group	Replace Smoke Detectors		all	16,000.00	12,000.00			Hold/system to be replaced
OH31-15 Renaissance/ Acquisition/Rehab	Replace Smoke Detectors		5	2,850.00	3,000.00			
	Total for Dwelling Structures			238,350.00	179,710.02	65,721.82	15,857.72	
OH31-03 Ravenna Woods	Replace Ranges/Hoods/Refrigerators	1465			22,400.00	0.00		
	Total for Dwelling Equipment-Nonexp.			0.00	22,400.00	0.00	0.00	
	Total for Nondwelling Structures	1470			0.00	0.00	0.00	

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

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
OH31-01 Athena Gardens	09/30/06			06/30/07			
OH31-01 Community Estates	09/30/06			06/30/07			
OH31-02 Scattered Sites	09/30/06			06/30/07			
OH31-03 Ravenna Woods	09/30/06			06/30/07			
OH31-04 Eastowne Manor	09/30/06			06/30/07			
OH31-05 Town Square	09/30/06			06/30/07			
OH31-06 Etna House							
OH31-09 Heritage Knolls	09/30/06			06/30/07			
OH31-11 Washington Group	09/30/06			06/30/07			
HA-Wide Physical Improvements	12/31/06			03/31/08			
Administration	12/31/06			03/31/08			
Fees & Costs	12/31/06			03/31/08			
Contingency	12/31/06			03/31/08			

Signature of Executive Director & Date:

Director, July 26, 2005

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

X

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

HA Name: Portage Metropolitan Housing Authority	Grant Type and Number: OH12PO3150106 Capital Fund Program Grant No: 2006 Replacement Housing Factor Grant No. 2006	Federal FY of Grant: 2006
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<input type="checkbox"/> Original Annual Statement	<input type="checkbox"/> Reserve for Disasters/Emergencies	<input type="checkbox"/> Revised Annual statement/Revision Number _____
<input checked="" type="checkbox"/> Performance and Evaluation report for Program Year Ending <u>30-Jun-07</u>	<input type="checkbox"/> Final Performance and Evaluation Report	

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CFP Funds	0.00	0.00	0.00	0.00
2	1406 Operations	20,000.00	61,918.00	61,918.00	61,918.00
3	1408 Management Improvements	77,550.00	61,000.00	0.00	0.00
4	1410 Administration	51,995.00	45,933.00	0.00	0.00
5	1411 Audit	2,500.00	0.00	0.00	0.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 Fees and Costs	1,000.00	0.00	0.00	0.00
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvement	14,000.00	14,000.00	0.00	0.00
10	1460 Dwelling Structures	276,410.00	281,500.00	0.00	0.00
11	1465.1 Dwelling Equipment - Nonexpendable	21,000.00	4,500.00	0.00	0.00
12	1470 Nondwelling Structures	0.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	10,000.00	10,000.00	0.00	0.00
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration	35,000.00	20,000.00	4,112.26	4,112.26
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1499 Development Activities	0.00	0.00	0.00	0.00
19	1501 Collateralization or Debt Service	0.00	0.00	0.00	0.00
20	1502 Contingency	15,000.00	0.00	0.00	0.00
21	Amount of Annual Grant (Sum of Lines 2-20)	524,455.00	498,851.00	66,030.26	66,030.26
22	Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23	Amount of line 21 Related to Section 504 Compliance	12,000.00	0.00	0.00	0.00
24	Amount of line 21 Related to Security - Soft Costs	5,050.00	0.00	0.00	0.00
25	Amount of line 21 Related to Security - Hard Costs	0.00	0.00	0.00	0.00
26	Amount of line 21 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

, Director June 30, 2007

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150106 Capital Fnd Program Grant No: 2006 Replacement Housing Factor Grant No: 2006			Federal FY of Grant: 2006			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No. Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
HA-Wide	Operations	1406		20,000.00	61,918.00	1,000.00	1,000.00	
HA-Wide	Management Improvements	1408						
	Resident Security			5,050.00	1,500.00			
	Develop Job Training & Business Develop Programs	1408.7		28,000.00	15,000.00			
	Coordinator of Social Services for Drug Elimination			42,000.00	42,000.00			
	Administrative/Management Improvements	1408.9		2,500.00	2,500.00			
	Total for Management Improvements			77,550.00	61,000.00	0.00	0.00	
HA-Wide	Administration	1410						
	a. Salaries	1410.1		35,040.00	32,040.00			
	b. Fringe Benefits	1410.9		16,000.00	12,938.00			
	c. Advertising	1410.19		955.00	955.00			
	Total for Administration			51,995.00	45,933.00	0.00	0.00	
HA-Wide	Fees & Costs	1430						
	a. Architect			500.00	0.00			
	b. Planning Fees			500.00	0.00			
	Total for Fees & Costs			1,000.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Structures	1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	
HA-Wide	Nondwelling Equipment	1475						
	a. Office/Maintenance Equipment			10,000.00	10,000.00			
	Total for Nondwelling Equipment			10,000.00	10,000.00	0.00	0.00	
HA-Wide	Relocation Cost	1495.1		0.00	0.00	0.00	0.00	
HA-Wide	Contingency	1502		15,000.00	0.00	0.00	0.00	

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

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number:OH12PO3150106 Capital Fnd Program Grant No: 2006 Replacement Housing Factor Grant No: 2006			Federal FY of Grant: 2006			
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Dev. Acct. No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work (2)
				Original	Revised	Funds Obligated	Funds Expended	
OH31-15 Acquisition Rehab 3038 Polly 3147 Denny	Replace Well Replace Well Total for Site Improvement	1450	1 1	7,000.00 7,000.00 14,000.00	7,000.00 7,000.00 14,000.00	0.00	0.00	
OH31-1 Athena Gardens	Repl Kit/Bath Cabinets/Counter tops/sinks/faucets Repl Bath Tubs/Cabinets/Counter Tops/Sinks/Faucets Cold Air Returns	1460	25 all	54,660.00 10,000.00	0.00 90,000.00 0.00			
OH31-1 Community Estates	Repl Kit/Bath Cabinets/Counter tops/sinks/faucets Repl Bath Tubs/Cabinets/Counter Tops/Sinks/Faucets Cold Air Returns		29 all	57,250.00 15,000.00	0.00 103,000.00 0.00			
OH31-3 Ravenna Woods	Repl Kit/Bath Cabinets/Counter tops/sinks/faucets		28	72,500.00	74,500.00			
OH31-4 Eastowne Manor	Handicapped Bathroom		1	12,000.00	0.00			
OH31-5 Town Square Villas	Repl Kit/Bath Cabinets/Counter tops/sinks/faucets Shed Doors/Thresholds		30 30	42,000.00 13,000.00	0.00 0.00			
OH31-15 Acquisition Rehab	Total for Dwelling Structures			276,410.00	281,500.00	0.00	0.00	
OH31-3 Harvest Woods	Replace Appliances	1465		16,500.00	0.00			Moved to 501-05 to Obligate Funds
OH31-15 Acquisition Rehab 3086 Polly Rd. 3138 Polly Rd. 3147 Denny Rd.	Install Water Softner Install Water Softner Install Water Softner	1465		1,500.00 1,500.00 1,500.00	1,500.00 1,500.00 1,500.00			
	Total for Dwelling Equipment-Nonexp.			21,000.00	4,500.00	0.00	0.00	
		1470						
	Total for Nondwelling Structures			0.00	0.00	0.00	0.00	

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

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
OH31-01 Athena Gardens	09/30/07			06/30/08			
OH31-01 Community Estates	09/30/07			06/30/08			
OH31-02 Scattered Sites	09/30/07			06/30/08			
OH31-03 Ravenna Woods	09/30/07			06/30/08			
OH31-04 Eastowne Manor	09/30/07			06/30/08			
OH31-05 Town Square	09/30/07			06/30/08			
OH31-06 Etna House							
OH31-09 Heritage Knolls							
OH31-15 Acquisition Rehab H-A Wide Physical Impr HA-Wide Mgmt. Impr. Administration	12/31/07			09/30/07			
Fees & Costs	12/31/07			03/31/08			
Contingency	12/31/07			03/31/08			

Signature of Executive Director & Date:

March 21, 2007

Signature of Public Housing Director/Office of Native American Programs Administrator & Date:

X