

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

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# PHA Plans

5 Year Plan for Fiscal Years 2005 - 2009

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:** Wausau Housing Authority

**PHA Number:** WI031

**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: 189   
 Number of S8 units:   
 Number of public housing units:  
 Number of S8 units: 435

**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) Wausau City Hall

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: (state mission here)

**B. Goals**

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD-suggested objectives or their own, **PHAS ARE STRONGLY ENCOURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS.** (Quantifiable measures would include targets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the spaces to the right of or below the stated objectives.

**HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.**

- PHA Goal: Expand the supply of assisted housing  
Objectives:
- Apply for additional rental vouchers:
  - Reduce public housing vacancies:
  - Leverage private or other public funds to create additional housing opportunities:
  - Acquire or build units or developments
  - Other (list below)
- PHA Goal: Improve the quality of assisted housing  
Objectives:
- Improve public housing management: (PHAS score)
  - Improve voucher management: (SEMAP score)
  - Increase customer satisfaction:
  - Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections)
  - Renovate or modernize public housing units:
  - Demolish or dispose of obsolete public housing:

- Provide replacement public housing:
- Provide replacement vouchers:
- Other: (list below)

PHA Goal: Increase assisted housing choices

Objectives:

- Provide voucher mobility counseling:
- Conduct outreach efforts to potential voucher landlords
- Increase voucher payment standards
- Implement voucher homeownership program:
- Implement public housing or other homeownership programs:
- Implement public housing site-based waiting lists:
- Convert public housing to vouchers:
- Other: (list below)

**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)

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

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

Objectives:

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

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

- PHA Goal: Ensure equal opportunity and affirmatively further fair housing  
Objectives:
  - Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:
  - Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:
  - Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
  - Other: (list below)

**Other PHA Goals and Objectives: (list below)**

**Annual PHA Plan**  
**PHA Fiscal Year 20**  
[24 CFR Part 903.7]

**i. Annual Plan Type:**

Select which type of Annual Plan the PHA will submit.

**Standard Plan**

**Troubled Agency Plan**

**ii. Executive Summary of the Annual PHA Plan**

[24 CFR Part 903.7 9 (r)]

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

**The Wausau Community Development Authority has aggressive plans for the 2008 program year. Recently, there have been numerous changes including staff, financial practices and operations of programs. These changes will allow the CDA to examine past practices and create new initiatives to better serve the tenant population for all the public housing programs.**

**Major initiatives include conducting energy surveys of all the properties and implementing environmentally friendly practices. These changes should result in increased energy savings and healthier environments for our tenants.**

**Local law enforcement staff will be invited to present programs to tenants on safety, both within our complexes and outside. We will also assess the grounds to ensure they are well lit and safe for our tenants.**

**Section 8 applicants and tenants will receive a brief orientation of homeownership opportunities and programs offered by the Community Development Department and services offered to include housing and budget counseling. Information will also be provided on available employment training and other options to promote self-sufficiency.**

**In 2007, the Community Development staff was involved in a money conference that included all aspects of money management, purchasing a home, saving and budgeting. The program was very well received and the committee is planning another event for 2008. Information relative to this event will be offered to all Section 8 and Public Housing Scattered Site tenants.**

**Community Development staff will work with local agencies to create a cooperative agreement to share information and/or target supportive services for our clients.**

### **iii. Annual Plan Table of Contents**

[24 CFR Part 903.7 9 (r)]

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

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#### **Attachments**

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

#### **Required Attachments:**

- Admissions Policy for Deconcentration
- FY 2005 Capital Fund Program Annual Statement
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)
- List of Resident Advisory Board Members
- List of Resident Board Member
- Community Service Description of Implementation
- Information on Pet Policy
- Section 8 Homeownership Capacity Statement, if applicable
- Description of Homeownership Programs, if applicable

Optional Attachments:

- PHA Management Organizational Chart
- FY 2005 Capital Fund Program 5 Year Action Plan
- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- Other (List below, providing each attachment name)

**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.

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
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
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	Annual Plan: Eligibility, Selection, and Admissions Policies

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	income mixing analysis	
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
X	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
	The most recent Public Housing Drug Elimination Program (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
	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	1323	5	3	4	4	5	5
Income >30% but <=50% of AMI	1074	4	3	4	4	4	4
Income >50% but <80% of AMI	1499	3	3	3	3	3	3
Elderly	757	3	2	2	2	2	2
Families with Disabilities		4	3	3	4	3	4
Asian	71						
Hispanic	14						
Black	34						
Other	5						

\* Data collected from Consolidated Plan

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

- Consolidated Plan of the Jurisdiction/s  
Indicate year: 2005-2009
- U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") dataset
- American Housing Survey data  
Indicate year:
- Other housing market study  
Indicate year:
- Other sources: (list and indicate year of information)

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input 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	445		56
Extremely low income <=30% AMI	370	83	
Very low income (>30% but <=50% AMI)	75	17	
Low income (>50% but <80% AMI)	0	0	
Families with children	242	54	
Elderly families	29	7	
Families with Disabilities	75	17	
White	321	72	
Black	34	8	
Am Ind/Al Nat	5	1	
Asian/Pac Isl	71	16	
Hispanic	14	3	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	173	39	

Housing Needs of Families on the Waiting List			
2 BR	159	36	
3 BR	88	20	
4 BR	18	4	
5 BR	4	.5	
5+ BR	3	.5	
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input 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	54		10
Extremely low income <=30% AMI	48	89	
Very low income (>30% but <=50% AMI)	5	10	
Low income (>50% but <80% AMI)	1	1	
Families with children	47	87	
Elderly families	7	13	
Families with Disabilities	11	20	
White	34	63	
Black	8	15	
Am Ind/Al Nat	1	1.5	
Asian/Pac Isl	10	19	
Hispanic	1	1.5	

Housing Needs of Families on the Waiting List			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	7	13	
2 BR	26	48	
3 BR	13	24	
4 BR	8	15	
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

### 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.

PHA Staff will initiate conversations with local agencies and organizations to come together to create a cooperative agreement that would facilitate shared information and target supportive services to better assist clients.

PHA will create a Resident Advisory Board to better serve the clients of public housing by giving them opportunity to provide input and comment on the Annual Plan.

PHA will take a pro-active role in the community to provide better code enforcement which will improve housing for tenants currently on the waiting list and who may be in substandard housing.

PHA Staff will continue to explore funding sources to construct a building to meet the needs of the disable population.

#### (1) Strategies

**Need: Shortage of affordable housing for all eligible populations**

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

Select all that apply

- Employ effective maintenance and management policies to minimize the number of public housing units off-line

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

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

Select all that apply

- Apply for additional section 8 units should they become available
- Leverage affordable housing resources in the community through the creation of mixed - finance housing
- Pursue housing resources other than public housing or Section 8 tenant-based assistance.
- Other: (list below)  
Work Closely with Community Development Department on housing programs to increase affordable unit stock.

**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)  
Seek Federal funding to build additional units available to the disabled.

**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)  
Staff continues to network with agencies which assist minorities and  
Continue to be a board participant for Emergency Housing Assistance

Fund (EHAF).

**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)**

**(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.

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2005 grants)</b>		
a) Public Housing Operating Fund		
b) Public Housing Capital Fund		
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance		
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants		
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
<b>3. Public Housing Dwelling Rental Income</b>		
<b>4. Other income (list below)</b>		
<b>4. Non-federal sources (list below)</b>		
<b>Total resources</b>		

### **3. PHA Policies Governing Eligibility, Selection, and Admissions**

[24 CFR Part 903.7 9 (c)]

#### **A. Public Housing**

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

##### **(1) Eligibility**

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

- When families are within a certain number of being offered a unit: (state number) **One**
- When families are within a certain time of being offered a unit: (state time)
- Other: (describe)

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

- Criminal or Drug-related activity
- Rental history
- Housekeeping
- Other (describe)

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

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

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

##### **(2) Waiting List Organization**

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

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

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

- PHA main administrative office
- PHA development site management office

Other (list below)

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

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

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

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

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

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

### **(3) Assignment**

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

- One
- Two
- Three or More

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

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

### **(4) Admissions Preferences**

a. Income targeting:

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

b. Transfer policies:

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

- Emergencies
- Overhoused
- Underhoused
- Medical justification
- Administrative reasons determined by the PHA (e.g., to permit modernization work)
- Resident choice: (state circumstances below)
- Other: (list below)

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

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

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

Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

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

4. Relationship of preferences to income targeting requirements:

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

**(5) Occupancy**

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

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

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

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

**(6) Deconcentration and Income Mixing**

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

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

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

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

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

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

- Additional affirmative marketing
- Actions to improve the marketability of certain developments

- Adoption or adjustment of ceiling rents for certain developments
- Adoption of rent incentives to encourage deconcentration of poverty and income-mixing
- Other (list below)

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

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

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

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

## B. Section 8

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

### (1) Eligibility

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

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

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

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

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

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

- Criminal or drug-related activity  
 Other (describe below)

**(2) Waiting List Organization**

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

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

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

- PHA main administrative office  
 Other (list below)

**(3) Search Time**

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

If yes, state circumstances below:

Family must submit a written request for an extension detailing the circumstances for request.

**(4) Admissions Preferences**

a. Income targeting

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

b. Preferences

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

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

Former Federal preferences

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

Other preferences (select all that apply)

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

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

Date and Time

Former Federal preferences

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

Other preferences (select all that apply)

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

- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)

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

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

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

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

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

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

#### **(5) Special Purpose Section 8 Assistance Programs**

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

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

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

- Through published notices
- Other (list below)

#### **4. PHA Rent Determination Policies**

## A. Public Housing

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

### (1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

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

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

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

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

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

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

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

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

e. Ceiling rents

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

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

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

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

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

- Market comparability study

- Fair market rents (FMR)
- 95<sup>th</sup> percentile rents
- 75 percent of operating costs
- 100 percent of operating costs for general occupancy (family) developments
- Operating costs plus debt service
- The "rental value" of the unit
- Other (list below)

f. Rent re-determinations:

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

- Never
- At family option
- Any time the family experiences an income increase
- Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold)\_\_\_\$200\_\_\_
- Other (list below)

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

**(2) Flat Rents**

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

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

**B. Section 8 Tenant-Based Assistance**

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

**(1) Payment Standards**

Describe the voucher payment standards and policies.

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

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

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

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

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

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

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

- Annually
- Other (list below)

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

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

**(2) Minimum Rent**

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

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

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

**5. Operations and Management**

[24 CFR Part 903.7 9 (e)]

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

**A. PHA Management Structure**

Describe the PHA’s management structure and organization.

(select one)

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

**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.)

<b>Program Name</b>	<b>Units or Families Served at Year Beginning</b>	<b>Expected Turnover</b>
Public Housing	175	18
Section 8 Vouchers	268	100
Section 8 Certificates	N/A	
Section 8 Mod Rehab	N/A	
Special Purpose Section 8 Certificates/Vouchers (list individually)	N/A	
Public Housing Drug Elimination Program (PHDEP)	N/A	
Enhanced Vouchers	22	2

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.

**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)  
Currently contracted with architectural firm to develop a 5-year capital Improvement plan.

-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)
- 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.)

### 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.)

<b>Demolition/Disposition Activity Description</b>
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.

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

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

## **10. Conversion of Public Housing to Tenant-Based Assistance**

[24 CFR Part 903.7 9 (j)]

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

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

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

2. Activity Description

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

<b>Conversion of Public Housing Activity Description</b>	
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
<p>5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one)</p> <input type="checkbox"/> Units addressed in a pending or approved demolition application (date submitted or approved: <input type="checkbox"/> Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: ) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: ) <input type="checkbox"/> Requirements no longer applicable: vacancy rates are less than 10 percent <input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units <input type="checkbox"/> Other: (describe below)

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

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

**11. Homeownership Programs Administered by the PHA**

[24 CFR Part 903.7 9 (k)]

The Community Development Division operates the Homeownership programs on behalf of the entire department.

**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.)

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

**B. Section 8 Tenant Based Assistance**

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

2. Program Description:

a. Size of Program

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

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

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

b. PHA-established eligibility criteria

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

If yes, list criteria below:

## **12. PHA Community Service and Self-sufficiency Programs**

[24 CFR Part 903.7 9 (l)]

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

### **A. PHA Coordination with the Welfare (TANF) Agency**

1. Cooperative agreements:

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

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

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

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

**B. Services and programs offered to residents and participants**

**(1) General**

a. Self-Sufficiency Policies

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

- Public housing rent determination policies
- Public housing admissions policies
- Section 8 admissions policies
- Preference in admission to section 8 for certain public housing families
- Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA
- Preference/eligibility for public housing homeownership option participation
- Preference/eligibility for section 8 homeownership option participation
- Other policies (list below)

b. Economic and Social self-sufficiency programs

- Yes  No: Does the PHA coordinate, promote or provide any programs to enhance the economic and social self-sufficiency of residents? (If “yes”, complete the following table; if “no” skip to sub-component 2, Family Self Sufficiency Programs. The position of the table may be altered to facilitate its use. )

Services and Programs				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)


**(2) Family Self Sufficiency program/s**

a. Participation Description

<b>Family Self Sufficiency (FSS) Participation</b>		
<b>Program</b>	<b>Required Number of Participants (start of FY 2005 Estimate)</b>	<b>Actual Number of Participants (As of: DD/MM/YY)</b>
Public Housing		
Section 8		

- 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.

#### **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 use 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. RESERVED FOR PET POLICY**

[24 CFR Part 903.7 9 (n)]

## **15. Civil Rights Certifications**

[24 CFR Part 903.7 9 (o)]

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

## **16. Fiscal Audit**

[24 CFR Part 903.7 9 (p)]

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

## **17. PHA Asset Management**

[24 CFR Part 903.7 9 (q)]

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

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

## **18. Other Information**

[24 CFR Part 903.7 9 (r)]

### **A. Resident Advisory Board Recommendations**

1.  Yes  No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
  
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)  
 Attached at Attachment (File name)  
 Provided below:
  
3. In what manner did the PHA address those comments? (select all that apply)  
 Considered comments, but determined that no changes to the PHA Plan were necessary.  
 The PHA changed portions of the PHA Plan in response to comments  
List changes below:  
 Other: (list below)

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

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

#### 3. Description of Resident Election Process

- a. Nomination of candidates for place on the ballot: (select all that apply)  
 Candidates were nominated by resident and assisted family organizations  
 Candidates could be nominated by any adult recipient of PHA assistance  
 Self-nomination: Candidates registered with the PHA and requested a place on ballot  
 Other: (describe)
  
- 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) **Wausau**
  
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
  - The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
  - The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
  - The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
  - Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
  
  - Other: (list below)
  
4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

**D. Other Information Required by HUD**

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

## **Attachments**

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

# 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      FFY of Grant Approval: (MM/YYYY)

Original Annual Statement

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

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

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

**Annual Statement**

**Capital Fund Program (CFP) Part III: Implementation Schedule**

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)

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)
<b>Total estimated cost over next 5 years</b>				



## VIOLENCE AGAINST WOMEN AND JUSTICE DEPARTMENT ACT OF 2005

### (VAWA)

#### **VAWA NOTIFICATION TO PARTICIPANTS AND LANDLORDS [Pub.L. 109-162]**

VAWA requires PHAs to notify the public housing participants of their rights under this law, including their right to confidentiality and the limits thereof.

#### **NOTIFICATION TO PARTICIPANTS [Pub.L. 109-162]**

The PHA will provide all participants with a VAWA certification form (HUD-50066), and an information Sheet explaining the protections afforded under the law, inform the participant of PHA confidentiality requirements and explanation of the form at the time of admission and at annual reexamination. Forms will also be provided upon request. The certification form gives the applicant or participant the opportunity to inform the PHA of his/her status as a victim of actual or threatened dating or domestic violence or stalking.

#### **NOTIFICATION TO LANDLORDS AND OWNERS [Pub.L. 109-62]**

VAWA requires PHAs to notify landlords and owners of their rights and responsibilities under this law and inform landlords and property owners of their screening and termination responsibilities related to VAWA. The PHA may utilize the following means to notify owners of their VAWA responsibilities:

- In day-to-day interactions with landlords and owners
- Inserts in HAP contracts, HAP payments, Tenancy Addenda, 1099s, orientations

#### **PROHIBITION AGAINST DENIAL OF ASSISTANCE TO VICTIMS OF DOMESTIC VIOLENCE, DATING VIOLENCE, AND STALKING [Pub.L. 109-162]**

The Violence against Women Reauthorization Act of 2005 (VAWA) prohibits denial of admission to an otherwise qualified applicant on the basis that the applicant is or has been a victim of domestic violence, dating violence, or stalking. Specifically, Section 607(2) of VAWA adds the following provision to Section 6 of the U.S. Housing Act of 1937, which lists contract provisions and requirements for the public housing program:

Every contract for contributions shall provide that . . . the public housing agency shall not deny admission to the project to any applicant on the basis that the applicant is or has been a victim of domestic violence, dating violence, or stalking if the applicant otherwise qualifies for

assistance or admission, and that nothing in this section shall be construed to supersede any provision of any Federal, State, or local law that provides greater protection than this section for victims of domestic violence, dating violence, or stalking.

## Definitions

As used in VAWA:

- The term *domestic violence* includes felony or misdemeanor crimes of violence committed by a current or former spouse of the victim, by a person with whom the victim shares a child in common, by a person who is cohabitating with or has cohabitated with the victim as a spouse, by a person similarly situated to a spouse of the victim under the domestic or family violence laws of the jurisdiction receiving grant monies, or by any other person against an adult or youth victim who is protected from that person's acts under the domestic or family violence laws of the jurisdiction.
- The term *dating violence* means violence committed by a person who is or has been in a social relationship of a romantic or intimate nature with the victim; and where the existence of such a relationship shall be determined based on a consideration of the following factors:
  - The length of the relationship
  - The type of relationship
  - The frequency of interaction between the persons involved in the relationship
- The term *stalking* means:
  - To follow, pursue, or repeatedly commit acts with the intent to kill, injure, harass, or intimidate; or
  - To place under surveillance with the intent to kill, injure, harass, or intimidate another person; and
  - In the course of, or as a result of, such following, pursuit, surveillance, or repeatedly committed acts, to place a person in reasonable fear of the death of, or serious bodily injury to, or to cause substantial emotional harm to (1) that person, (2) a member of the immediate family of that person, or (3) the spouse or intimate partner of that person.
- The term *immediate family member* means, with respect to a person –
  - A spouse, parent, brother or sister, or child of that person, or an individual to whom that person stands in the position or place of a parent; or
  - Any other person living in the household of that person and related to that person by blood and marriage.

## Notification and Victim Documentation

### PHA Policy

The PHA acknowledges that a victim of domestic violence, dating violence, or stalking may have an unfavorable history that would warrant denial under the PHA's policies. Therefore, if the PHA makes a determination to deny admission to an applicant family on the basis of an unfavorable history, the PHA will include in its notice of denial a statement of the protection against denial provided by VAWA and will offer the applicant the opportunity to provide documentation affirming that the cause of the unfavorable history is that a member of the applicant family is or has been a victim of domestic violence, dating violence, or stalking.

The documentation must include two elements:

A completed Certification of Domestic Violence, Dating Violence or Stalking (HUD-50066) naming the perpetrator and certifying that the incidents in question are bona fide incidents of actual or threatened domestic violence, dating violence, or stalking

And one of the following:

A police or court record documenting the actual or threatened abuse

A statement signed by an employee, agent, or volunteer of a victim service provider; an attorney; or a medical professional from whom the victim has sought assistance in addressing the actual or threatened abuse. The professional must attest under penalty of perjury that the incidents in question are bona fide incidents of abuse, and the victim must sign or attest to the statement.

The applicant must submit the required documentation with her or his request for an informal hearing (see section 14-I.B). If after reviewing the documentation provided by the applicant the PHA determines the family is eligible for assistance, no informal hearing will be scheduled and the PHA will proceed with admission of the applicant family.

## Perpetrator Removal or Documentation of Rehabilitation

### PHA Policy

In cases where an applicant family includes the perpetrator as well as the victim of domestic violence, dating violence, or stalking, the PHA will proceed as above but will require, in addition, either (a) that the perpetrator be removed from the applicant household and not reside in the public housing unit or (b) that the family provide documentation that the perpetrator has successfully completed, or is successfully undergoing, rehabilitation or treatment.

If the family elects the second option, the documentation must be signed by an employee or agent of a domestic violence service provider or by a medical or other knowledgeable professional from whom the perpetrator has sought or is receiving assistance in addressing the abuse. The signer must attest under penalty of perjury to his or her belief that the rehabilitation was successfully completed or is progressing successfully. The victim and perpetrator must also sign or attest to the documentation.

This additional documentation must be submitted within the same time frame as the documentation required above from the victim.

### **PHA Confidentiality Requirements**

All information provided to the PHA regarding domestic violence, dating violence, or stalking, including the fact that an individual is a victim of such violence or stalking, must be retained in confidence and may neither be entered into any shared database nor provided to any related entity, except to the extent that the disclosure (a) is requested or consented to by the individual in writing, (b) is required for use in an eviction proceeding, or (c) is otherwise required by applicable law.

**PROHIBITION AGAINST TERMINATING TENANCY OF VICTIMS OF DOMESTIC VIOLENCE, DATING VIOLENCE, AND STALKING [Pub.L. 109-162 and 109-271]**

The Violence against Women Reauthorization Act of 2005 (VAWA), provides that "criminal activity directly relating to domestic violence, dating violence, or stalking, engaged in by a member of a tenant's household or any guest or other person under the tenant's control, shall not be cause for termination of the tenancy or occupancy rights, if the tenant or immediate family member of the tenant's family is the victim or threatened victim of that abuse." VAWA further provides that incidents of actual or threatened domestic violence, dating violence, or stalking may not be construed either as serious or repeated violations of the lease by the victim of such violence or as good cause for terminating the tenancy or occupancy rights of the victim of such violence.

VAWA does not limit the PHA's authority to terminate the tenancy of any tenant if the PHA can demonstrate an actual and imminent threat to other tenants or those employed at or providing service to the property.

## Victim Documentation

### PHA Policy

When a tenant family is facing lease termination because of the actions of a tenant, household member, guest, or other person under the tenant's control and a tenant or immediate family member of the tenant's family claims that she or he is the victim of such actions and that the actions are related to domestic violence, dating violence, or stalking, the PHA will require the individual to submit documentation affirming that claim.

The documentation must include two elements:

A completed Certification of Domestic Violence, Dating Violence or Stalking (HUD-50066) naming the perpetrator and certifying that the incidents in question are bona fide incidents of actual or threatened domestic violence, dating violence, or stalking

And one of the following:

A police or court record documenting the actual or threatened abuse

A statement signed by an employee, agent, or volunteer of a victim service provider; an attorney; or a medical professional from whom the victim has sought assistance in addressing the actual or threatened abuse. The professional must attest under penalty of perjury that the incidents in question are bona fide incidents of abuse, and the victim must sign or attest to the statement.

The required certification and supporting documentation must be submitted to the PHA within 14 business days after the individual claiming victim status receives a request for such certification. The PHA, owner or manager will be aware that the delivery of the certification form to the tenant in response to an incident via mail may place the victim at risk, e.g., the abuser may monitor the mail. The PHA may require that the tenant come into the office to pick up the certification form and will work with tenants to make delivery arrangements that do not place the tenant at risk. If the individual does not provide the required certification and supporting documentation within 14 business days, the PHA may proceed with assistance termination.

The PHA also reserves the right to waive these victim verification requirements and accept only a self-certification from the victim if the PHA deems the victim's life to be in imminent danger.

Once a victim has completed certification requirements, the PHA will continue to assist the victim and may use bifurcation as a tool to remove a perpetrator from assistance. Owners will be notified of their legal obligation to continue housing the victim, while using lease bifurcation to remove the perpetrator from a unit. The PHA will make all best efforts to

work with victims of domestic violence before terminating the victim's assistance.

In extreme circumstances when the PHA can demonstrate an actual and imminent threat to other participants or those employed at or providing service to the property if the participant's (including the victim's) tenancy is not terminated, the PHA will bypass the standard process and proceed with the immediate termination of the family's assistance.

### **Terminating or Evicting a Perpetrator of Domestic Violence**

Although VAWA provides protection from termination for victims of domestic violence, it does not provide protection for perpetrators. In fact, VAWA gives the PHA the explicit authority to bifurcate a lease, or to remove a household member from a lease, "in order to evict, remove, terminate occupancy rights, or terminate assistance to any individual who is a tenant or lawful occupant and who engages in criminal acts of physical violence against family members or others, without evicting, removing, terminating assistance to, or otherwise penalizing the victim of such violence who is also a tenant or lawful occupant." This authority supersedes any local, state, or other federal law to the contrary. However, if the PHA chooses to exercise this authority, it must follow any procedures prescribed by HUD or by applicable local, state, or federal law for eviction, lease termination, or termination of assistance [Pub.L. 109-271].

#### PHA Policy

When the actions of a tenant or other family member result in a determination by the PHA to terminate the family's lease and another family member claims that the actions involve criminal acts of physical violence against family members or others, the PHA will request that the victim submit the above required certification and supporting documentation in accordance with the stated time frame. If the certification and supporting documentation are submitted within the required time frame or any approved extension period, the PHA will bifurcate the lease and evict or terminate the occupancy rights of the perpetrator. If the victim does not provide the certification and supporting documentation, as required, the PHA will proceed with termination of the family's lease.

If the PHA can demonstrate an actual and imminent threat to other tenants or those employed at or providing service to the property if the tenant's tenancy is not terminated, the PHA will bypass the standard process and proceed with the immediate termination of the family.

## PHA Confidentiality Requirements

All information provided to the PHA regarding domestic violence, dating violence, or stalking, including the fact that an individual is a victim of such violence or stalking, must be retained in confidence and may neither be entered into any shared data base nor provided to any related entity, except to the extent that the disclosure (a) is requested or consented to by the individual in writing, (b) is required for use in an eviction proceeding, or (c) is otherwise required by applicable law.

Adopted by Community Development Authority, Board of Commissioner approval  
this 23<sup>rd</sup> day of June, 2008, in Wausau, Wisconsin.

BY: \_\_\_\_\_

Kelly Zagrzebski

Chair

ATTEST: \_\_\_\_\_

Executive Director

## CERTIFICATION OF VICTIM STATUS

VAWA gives housing agencies and owners the discretion to provide benefits to an individual based solely on the individual's statement or other corroborating evidence. However, the Act also permits housing agencies and owners to request that victims attest to their status by signing a HUD-approved certification form. The form must meet the following standards:

1. It must require the individual signing it to certify that she or he is the victim of "bona fide" incidents of actual or threatened domestic violence, dating violence, or stalking, as defined and described in VAWA.
2. It must include the name of the perpetrator.
3. It must be provided within 14 business days unless the housing agency or owner requesting the form extends the deadline.

VAWA provides the victim the alternative of providing the housing agency or owner one of the following types of documentation:

1. A local police or court record
2. Documentation signed by a victim service provider, an attorney, or a medical professional from whom the victim has sought assistance in addressing domestic violence, dating violence, or stalking. The signer must attest under penalty of perjury (a) that the abuse the victim has suffered is a bona fide incidence of domestic violence, dating violence, or stalking and (b) that the victim has signed or approved the documentation.

Failure on the part of the victim to provide certification within the allotted time voids the protections provided by VAWA.

## CONFIDENTIALITY

Any information or documentation provided to a housing agency or owner by a victim of domestic violence, dating violence, or stalking must be kept in confidence. No information or documentation may be (a) entered into any shared databases or (b) disclosed to "any related entity" except under the following conditions:

1. The victim requests or consents to the disclosure in writing.
2. The disclosure is required for use in an eviction proceeding.
3. The disclosure is otherwise required by applicable law.

### Disclaimer

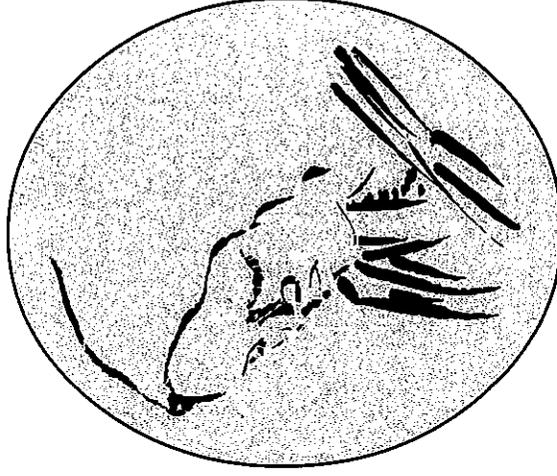
Housing Forms, Inc., has prepared this brochure for informational purposes only. It should not be used as a legal guide. If you have specific legal questions concerning your unique situation, you should consult an attorney, legal aid, or an official agency qualified to assist you.

### *For information in your area:*

**Wausau Community Development Authority**  
550 East Thomas Street  
Wausau, WI 54403  
(715) 845-4144

This brochure was designed to meet the requirements of HUD Notice PIH-2006-23.

**VIOLENCE AGAINST WOMEN  
IN FEDERALLY FUNDED  
RENTAL ASSISTED HOUSING**



*Learn About Your Rights  
as a Victim of  
Domestic Violence*

## BACKGROUND

The Violence Against Women Act (VAWA) of 2005 is an amended version of the 1994 VAWA which provides new protections for victims of domestic violence, dating violence, or stalking. These protections include provisions protecting victims who live in public housing or who are receiving housing assistance under the federal housing voucher program. The information contained in this brochure is intended to inform you of your rights and responsibilities under VAWA.

## DEFINITIONS

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

**“Dating Violence”** – *The term ‘dating violence’ means violence committed by a person “(A) who is or has been in a social relationship of a romantic or intimate nature with the victim; and (B) where the existence of such a relationship shall be determined based on a consideration of the following factors: (i) The length of the relationship. (ii) The type of relationship. (iii) The frequency of interaction between the persons involved in the relationship.”*

**“Stalking”** – *The term ‘stalking’ means engaging in a course of conduct directed at a specific person that would cause a reasonable person to “(A) fear for his or her safety or the safety of others; or (B) suffer substantial emotional distress.”*

## What Protections Are Provided by VAWA?

There are two areas of protection for those persons seeking or receiving assistance under the federally funded public housing program or voucher program.

1. Denial of Assistance – The law provides that you cannot be denied assistance because you are a victim of domestic violence, dating violence, or stalking if you are otherwise qualified to receive such assistance.

2. Termination of Tenancy or Assistance – The law further protects those who are currently receiving federal housing assistance from losing assistance or housing solely on the basis of their status as a victim of domestic violence, dating violence, or stalking.

In summary, VAWA prevents housing agencies and owners from considering actual or threatened domestic violence, dating violence, or stalking as a cause for terminating the tenancy, occupancy, or program assistance of the victim. Such violence or stalking may not be considered (1) as a serious or repeated violation of the lease by the victim, (2) as other good cause for terminating the tenancy or occupancy rights of the victim, or (3) as criminal activity justifying the termination of the tenancy, occupancy rights, or program assistance of the victim.

## What About the Perpetrator?

If the perpetrator is a member of the victim’s household, the agency administering the voucher or public housing programs has the authority to require the individual to leave the household as a condition of providing continued assistance

to the remaining members of the family. Additionally, if state law allows, the housing agency has the authority to bifurcate a lease, or divide it into two parts to deal with family members who engage in criminal acts of physical violence against family members or others. Bifurcation would allow the housing agency or owner to take eviction or termination action against a perpetrator of physical violence without penalizing the victim.

## What Are the Limitations of VAWA?

Housing agencies and owners retain the authority to terminate the tenancy, occupancy, or program assistance of a victim under either of the following conditions:

1. The termination is for a lease violation premised on something other than an act of domestic violence, dating violence, or stalking against the victim and the housing agency or owner is holding the victim to a standard no more “demanding” than the standard to which other tenants are held.
2. The housing agency or owner can demonstrate an “actual and imminent threat to other tenants or those employed at or providing service to the property” if the tenancy, occupancy, or program assistance of the victim is not terminated.

### FOR ADDITIONAL INFORMATION

#### ON VAWA

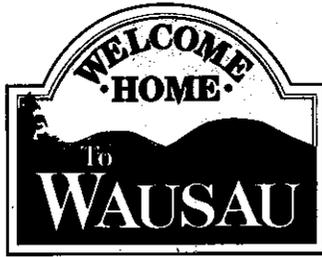
\*National Domestic Violence Hotline  
1-800-799-SAFE (7233)

1-800-787-3224 (TITY)  
<http://www.ndvhw.org/>

\*HUD Housing Discrimination Hotline  
1-800-669-9777

\*For Complete text of VAWA see Public Law 109-162  
(Specifically refer to Title VI, Sections 606 and 607)

Community Development Authority



Michael H. Morrissey  
Executive Director

Betty A. Noel  
Public Housing Manager

I acknowledge receipt of the following documents and accept responsibility to read them:

\_\_\_\_\_ VIOLENCE AGAINST WOMEN  
IN FEDERALLY FUNDED  
RENTAL ASSISTED LIVING  
Learn About Your Rights as a Victim of Domestic Violence

\_\_\_\_\_ Certification of Domestic Violence, Dating Violence, or  
Stalking (HUD-50066)

\_\_\_\_\_ 2007 Wisconsin Act 184

\_\_\_\_\_  
Signature of Recipient

\_\_\_\_\_  
Signature of Recipient

\_\_\_\_\_  
Unit Address

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of CDA Representative

\_\_\_\_\_  
Date

Additional forms available upon request.

2007 Senate Bill 269

Date of enactment: March 26, 2008

Date of publication\*: April 9, 2008

## 2007 WISCONSIN ACT 184

**AN ACT** to renumber and amend 704.19 (2) (b); and to create 66.0627 (7), 704.01 (3m), 704.16 and 704.44 of the statutes; relating to: terminating a tenancy for imminent threat of serious physical harm, making rental agreements that restrict access to certain services void and unenforceable, and prohibiting the imposition of fees for certain local government law enforcement services.

*The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:*

**SECTION 1e.** 66.0627 (7) of the statutes is created to read:

66.0627 (7) Notwithstanding sub. (2), no city, village, town, or county may enact an ordinance, or enforce an existing ordinance, that imposes a fee on the owner or occupant of property for a call for assistance that is made by the owner or occupant requesting law enforcement services that relate to any of the following:

- (a) Domestic abuse, as defined in s. 813.12 (1) (am).
- (b) Sexual assault, as described under ss. 940.225, 948.02, and 948.025.
- (c) Stalking, as described in s. 940.32.

**SECTION 1m.** 704.01 (3m) of the statutes is created to read:

704.01 (3m) "Rental agreement" means an oral or written agreement between a landlord and tenant, for the rental or lease of a specific dwelling unit or premises, in which the landlord and tenant agree on the essential terms of the tenancy, such as rent. "Rental agreement" includes a lease. "Rental agreement" does not include an agreement to enter into a rental agreement in the future.

**SECTION 1s.** 704.16 of the statutes is created to read:

**704.16 Termination of tenancy for imminent threat of serious physical harm.** (1) TERMINATING TENANCY BY TENANT. A residential tenant may terminate his or her tenancy and remove from the premises if both of the following apply:

(a) The tenant or a child of the tenant faces an imminent threat of serious physical harm from another person if the tenant remains on the premises.

(b) The tenant provides the landlord with notice in the manner provided under s. 704.21 and with a certified copy of any of the following:

1. An injunction order under s. 813.12 (4) protecting the tenant from the person.
2. An injunction order under s. 813.122 protecting a child of the tenant from the person.
3. An injunction order under s. 813.125 (4) protecting the tenant or a child of the tenant from the person, based on the person's engaging in an act that would constitute sexual assault under s. 940.225, 948.02, or 948.025, or stalking under s. 940.32, or attempting or threatening to do the same.
4. A condition of release under ch. 969 ordering the person not to contact the tenant.

\* Section 991.11, WISCONSIN STATUTES 2005-06: Effective date of acts. "Every act and every portion of an act enacted by the legislature over the governor's partial veto which does not expressly prescribe the time when it takes effect shall take effect on the day after its date of publication as designated" by the secretary of state [the date of publication may not be more than 10 working days after the date of enactment].

5. A criminal complaint alleging that the person sexually assaulted the tenant or a child of the tenant under s. 940.225, 948.02, or 948.025.

6. A criminal complaint alleging that the person stalked the tenant or a child of the tenant under s. 940.32.

7. A criminal complaint that was filed against the person as a result of the person being arrested for committing a domestic abuse offense against the tenant under s. 968.075.

(2) **NOT LIABLE FOR RENT.** If a residential tenant removes from the premises because of a threat of serious physical harm to the tenant or to a child of the tenant from another person and provides the landlord with a certified copy specified under sub. (1) and with notice that complies with s. 704.21, the tenant shall not be liable for any rent after the end of the month following the month in which he or she provides the notice or removes from the premises, whichever is later. The tenant's liability for rent under this subsection is subject to the landlord's duty to mitigate damages as provided in s. 704.29 (2).

(3) **TERMINATION OF TENANCY BY LANDLORD.** (a) In this subsection, "offending tenant" is a tenant whose tenancy is being terminated under this subsection.

(b) A landlord may terminate the tenancy of an offending tenant if all of the following apply:

1. The offending tenant commits one or more acts, including verbal threats, that cause another tenant, or a child of that other tenant, who occupies a dwelling unit in the same single-family rental unit, multiunit dwelling, or apartment complex as the offending tenant to face an imminent threat of serious physical harm from the offending tenant if the offending tenant remains on the premises.

2. The offending tenant is the named offender in any of the following:

a. An injunction order under s. 813.12 (4) protecting the other tenant from the offending tenant.

b. An injunction order under s. 813.122 protecting the child of the other tenant from the offending tenant.

c. An injunction order under s. 813.125 (4) protecting the other tenant or the child of the other tenant from the offending tenant, based on the offending tenant's engaging in an act that would constitute sexual assault under s. 940.225, 948.02, or 948.025, or stalking under s. 940.32, or attempting or threatening to do the same.

d. A condition of release under ch. 969 ordering the offending tenant not to contact the other tenant.

e. A criminal complaint alleging that the offending tenant sexually assaulted the other tenant or the child of the other tenant under s. 940.225, 948.02, or 948.025.

f. A criminal complaint alleging that the offending tenant stalked the other tenant or the child of the other tenant under s. 940.32.

g. A criminal complaint that was filed against the offending tenant as a result of the offending tenant being arrested for committing a domestic abuse offense against the other tenant under s. 968.075.

3. The landlord gives the offending tenant written notice that complies with s. 704.21 requiring the offending tenant to vacate on or before a date that is at least 5 days after the giving of the notice. The notice shall state the basis for its issuance and the right of the offending tenant to contest the termination of tenancy in an eviction action under ch. 799. If the offending tenant contests the termination of tenancy, the tenancy may not be terminated without proof by the landlord by the greater preponderance of the credible evidence of the allegations against the offending tenant.

**SECTION 2.** 704.19 (2) (b) of the statutes is renumbered 704.19 (2) (b) 1. and amended to read:

704.19 (2) (b) 1. A periodic tenancy can be terminated by notice under this section only at the end of a rental period. In the case of a tenancy from year-to-year the end of the rental period is the end of the rental year even though rent is payable on a more frequent basis. **Nothing**

2. Notwithstanding subd. 1., nothing in this section prevents termination of a tenancy before the end of a rental period because of an imminent threat of serious physical harm, as provided in s. 704.16, or for nonpayment of rent or breach of any other condition of the tenancy, as provided in s. 704.17.

**SECTION 3.** 704.44 of the statutes is created to read:

**704.44 Rental agreement that restricts access to certain services is void.** A rental agreement is void and unenforceable if it allows a landlord in a residential tenancy to do any of the following because a tenant has contacted an entity for law enforcement services, health services, or safety services:

- (1) Increase rent.
- (2) Decrease services.
- (3) Bring an action for possession of the premises.
- (4) Refuse to renew a rental agreement.
- (5) Threaten to take any action under subs. (1) to (4).

**SECTION 4. Initial applicability.**

(1) **TENANTS AND LANDLORDS.** The treatment of sections 704.16, 704.19 (2) (b), and 704.44 of the statutes first applies to rental agreements entered into, modified, or renewed on the effective date of this subsection.

(2m) **LOCAL GOVERNMENT LAW ENFORCEMENT SERVICES.** The treatment of section 66.0627 (7) of the statutes first applies to a call that is made for law enforcement services on the effective date of this subsection.



## Financial Resources

1. HUD
2. Rental Income
3. WHEDA

# TENANT SELECTION AND ASSIGNMENT POLICIES

The Tenant Selection and Assignment Policies have been designed by the CDA to take into consideration the needs of individual families for low-income housing and the statutory purpose in developing and operating a socially and financially sound low-income housing program which provides a decent home and a suitable living environment and fosters economic and social diversity in the tenant body as a whole.

The CDA, in order to attain a tenant population with a broad range of incomes representative of low-income families in the CDA's jurisdiction, will select tenants from the waiting list with rent paying ability sufficient for the CDA's housing program to maintain financial stability.

## **In order to attain these goals:**

1. The CDA, whenever possible, will implement the Public Housing Deconcentration Policy which is being approved with this revision of the Admission To and Continued Occupancy Of Low Rent Public Housing Policy. The CDA shall; (1) determine and compare the relative tenant incomes of each development and the incomes of census tracts in which the developments are located and; (2) consider what policies, measures, or incentives are necessary to bring higher-income families into lower-income developments (or if appropriate, to achieve the deconcentration of poverty, into developments in lower-income census tracts) and lower-income families into higher-income developments (or if appropriate, to achieve the deconcentration of poverty into developments in higher-income census tracts). The Deconcentration Policy is in accordance to the Quality Housing and Work Responsibility Act of 1998 (QHWRA) published February 18, 1999 in the Federal Register.
2. The CDA will not discriminate against any applicant because of race, color, religion, sex, national origin, familial status, disability (physical or mental), age, ancestry, marital status and sexual orientation. Each applicant will be assigned his/her appropriate place on the CDA's waiting list in sequence, based upon date and time his/her application is received, suitable type or size of unit, and factors affecting preference or priority established by the CDA's regulations. At a given time, the applicant first on the waiting list shall be offered a suitable unit at the location that contains the vacancy. If the applicant rejects the unit offered they will be placed on the bottom of the waiting list. A Family

that is on a Section 8 waiting list will not lose its place on that waiting list by applying for the CDA's public housing projects.

In carrying out the above plan, should the applicant present to the satisfaction of the CDA clear evidence that acceptance of a given offer of a suitable vacancy will result in undue hardship not related to considerations of race, sex, religion, color, national origin or language, such as inaccessibility to source of employment, children's day care and the like, refusal of such an offer shall not be counted as one of the number of allowable refusals permitted an applicant before placing his/her name at the bottom of the eligible list.

3. No applicant who is a victim of domestic violence, dating violence, or stalking shall be denied admission into the program if they are otherwise qualified.
4. The CDA in selecting eligible applicants to fill available units of suitable size will give preference to applicants using the following criteria:
  - Date and Time of Application
  -

**Buildings Designated for the Elderly and Disabled: River View Towers and Kannenberg Plaza have been designated for elderly or disabled only. Vacancies for these units will only be offered to the elderly or disabled.**

**Accessible Units: Accessible units will be first offered to families who may benefit from accessible features. These units were designed specifically to meet the needs of persons requiring the use of wheelchairs and persons requiring other modifications. If there are no applicants who would benefit from the accessible features, the unit will be offered to other applicants in the order that their names come to the top of the waiting list. Such applicants, however, must sign a release form stating they will accept a transfer (at their own expense) if, at a future time, a family requiring an accessible feature applies. Any family required to transfer will be given a 30-day notice.**

5. Reassignment or transfers to other dwelling units shall be made without regard to race, color, religion, sex, national origin, age or handicap as follows:
  - A. Tenants shall not be transferred to a dwelling unit of equal size either within a project or between projects, except for alleviating hardships as determined by the Executive Director or his/her designee;
  - B. Transfers within the projects shall be made to correct occupancy standards. The transfer will happen if the Family is in good standings with the CDA and would not adversely affect the health, safety, or welfare of other residents, or physical environment, or the financial stability of the project. A record of any of the following may be

- sufficient cause for the Authority to deny the transfer: (1) the family does not owe back rent or damage to the unit fees; (2) unacceptable living or housekeeping habits, documented on an Inspection Report; (3) disturbance of neighbors; (4) destruction of property; or (5) a history of non-sufficient funds checks.
- C. Transfers required to comply with occupancy standards shall take precedence over new admissions.
6. To preclude admission of applicants whose habits and practices reasonably may be expected to have a detrimental effect on the tenants or project environment the CDA will follow the requirements as defined in Part 2, (2) (B) of this Policy.

## OCCUPANCY STANDARDS

1. **Dwelling units will be assigned as follows:**
- A. No more than two (2) persons would be required to occupy a bedroom;
  - B. Persons of different generations, persons of opposite sex, (other than spouse/co-heads) and unrelated adults would not be required to share a bedroom;
  - C. Children (including foster children) of the same sex may share a bedroom;
  - D. Children, with the possible exception of infants up to the age of 5 years old, would not be required to share a bedroom with persons of different generations, including their parents;
  - E. A live-in care attendant who is not a member of the family should not be required to share a bedroom;
  - F. The living room shall not be considered a bedroom;
  - G. Space will be provided for members of the family living at college, but are home during school recess.
  - H. Space will not be provided for family members that are in the Military.
  - I. The CDA will not assign a larger bedroom size due to additions of family members other than by birth, adoption, court-awarded custody, or the need for a live-in attendant would cause overcrowding. The change in unit size shall be made effective upon availability of an appropriately sized unit.
  - J. If a tenant becomes disabled and unable to live in premises so that it remains vacant for a period of 120 days, that tenant shall be given a 30 day notice to vacate with the provision that if the tenant returns to the dwelling before the end of the 30 day period the notice will be dropped. A tenant who vacates under these circumstances shall be

given first preference for a dwelling if that person later becomes physically able to return. In the interest of effective management, and the health and welfare of all its tenants, tenants may be required, at their expense, to have a qualified physician complete a Certificate of Health before they can be allowed to continue in occupancy.

**2. Transfer List:**

In the event where there are several units that qualify for larger sized units, a Transfer List will be started. This list will consist of all the tenant family names and will be sequenced accordingly to their move-in date. The tenant family that has been receiving assistance the longest will be first on the Transfer List. All transfers will be granted as stated in Part 4 (5) of this policy.

**3. The following is the standard range of persons per bedroom:**

Number of Bedrooms	Number of Person	
	Minimum	Maximum
1	1	2
2	2	4
3	3	6
4	5	8
5	7	10

Such standards may be waived when a vacancy problem exists and it is necessary to achieve or maintain full occupancy by temporarily assigning a family to a larger size unit than is required. Such family will be transferred to the proper size unit as soon as one becomes available. The CDA may grant exceptions from the occupancy standards if the family requests and the CDA has determined the exceptions are justified according to this policy. The CDA will consider the size of the unit and the size of the bedrooms, as well as the number of bedrooms when an exception is requested.

# ELIGIBILITY REQUIREMENTS

The Community Development Authority of the City of Wausau (CDA) is the policy-making body for the Public Housing developments located in the City of Wausau. It is the purpose of the CDA to provide safe, decent, and sanitary housing at an affordable price. The CDA provides facilities and services on a non-discriminatory basis as required by Federal, State, and local laws. This policy shall apply to the Low-Rent Public Housing projects located at:

**Elderly/Disabled Units at:**

**1240 Merrill Avenue, Wausau (S8NC)**

**500 Grand Avenue, Wausau (PH)**

**Scattered Sites:**

**3 and 4 bedroom units (PH)**

1. **Profile Requirements:**

To be eligible for admission, an applicant must meet the following qualifications:

- A. **Income Limits** – To be financially eligible, the applicant family at admission, must not exceed the **low** annual income limits (PH), **very low** annual income limit (S8NC) for occupancy established by HUD as defined in Appendix A. In order to insure that very low-income families are not discriminated against, it will be the policy of the CDA to admit not less than 40% of all families with incomes at or below 30% of the county's median annual income limits as defined in Appendix A.; and
- B. **Family** – A family may be: (1) two or more persons related by blood, marriage, adoption or who give evidence of a family-type relationship which has existed not less than 2 years; (2) a family with a child or children; (3) a group of persons consisting of two or more elderly persons or disabled persons living together, or one or more elderly or disabled person living with one or more live-in aides and; (4) a single or a group of persons. By definition a family must contain a competent adult of at least 18 years of age, or an emancipated minor, to enter into a contract and capable of functioning as the head of household. There must be some concept of family living together beyond the mere sharing or intention to share housing accommodations by two or more persons to constitute them as a family within the meaning of this policy.
- C. **Single Person Family** – A single person family may be: (1) an elderly person, (2) a displaced person; (3) a disabled/handicapped

- person; (4) the remaining member of a tenant family and; (5) any other single person.
- D. There must be, at least, one (1) member of the household that is a citizen or eligible non-citizen. (24 CFR Part 200 and Part 5, Subpart E).
  - E. Who have not committed any fraud in connection with any Federal Housing Assistance Program
  - F. The applicant agrees to pay the rent required by the CDA.
  - G. The unit will be the family's only residence.
  - H. Student Law - Student Law Eligibility Requirements No Assistance shall be provided under section 8 of the 1937 Act to any individual who: is enrolled as a student at an institution of higher education, as defined under section 102 of the Higher Education Act of 1965 (20 U.S.C. 1002) ; is under 24 years of age; is not a veteran of the US. Military; is unmarried; does not have a dependent child; is not a person with disabilities, as such term is defined in section 3(b)3(E) of the U.S. Housing Act of 1937 (42 U.S.C. 1437a(b)(3)(E)) and was not receiving assistance under section 8 as of 11/30/05; and is not otherwise individually eligible, or has parents who, individually or jointly, are not eligible on the basis of income to receive assistance under section 8 of the 1937 Act. For a student who is under the age of 24 years of age who is not a veteran; is unmarried; does not have a dependent child; is not disabled, and was receiving section 8 assistance as of 11/30/05, and who is seeking section 8 assistance, section 327 (a) of the Act sets up a two-part income eligibility test. Both parts of this test must be affirmatively met. That is, both the student and the student's parents (individually or jointly) must be income eligible for the student to receive section 8 assistance. If it is determined that the parent(s) are not income eligible, the student is ineligible to receive section 8 assistance. Please read the entire notice for complete requirements on determining eligibility. Existing students are not grandfathered in. This law applies to both part-time and full-time students.

2. **Non-Economic Eligibility Criteria:**

Once eligibility has been determined based on the above-mentioned criteria, the CDA will evaluate each applicant to determine whether he/she would be reasonably expected to have a detrimental effect on the other residents or on the project environment. Relevant information regarding habits or practices to be considered may include, but are not limited to:

- A. Persons evicted from public housing, Indian housing, Section 23, or any Section 8 program because of drug-related criminal activity are

ineligible for admission to public housing for a five-year period beginning on the date of such eviction.

- B. Whether the conduct of the applicant in present or prior housing has been such that admission to the program would adversely affect the health, safety, or welfare of other residents, or the physical environment, or the financial stability of the project. A record of any of the following may be sufficient cause for the Authority to deny eligibility:
- (1) An applicants past performance in meeting financial obligations especially rent and utility bills;
  - (2) a record of disturbance of neighbors, destruction of property, or unacceptable living or housekeeping habits;
  - (3) a determination by the CDA that an applicant is illegally using or has been charged with a drug-related activity
  - (4) a determination by the CDA that there is reasonable cause to believe that an applicant abuses alcohol in a way that may interfere with the health, safety, or right to peaceful enjoyment of the premises by other residents;
  - (5) a determination by the CDA that there is reasonable cause to believe that the applicant's pattern of illegal use of a controlled substance or pattern of abuse of alcohol may interfere with the health, safety, or right to peaceful enjoyment of the premises by other residents; and
  - (6) a history of criminal activity involving crimes of physical violence to persons or property or a record of other criminal acts which adversely affect the health, safety, or welfare of other residents.
- C. All available credit references will be checked on the applicant. The following items will be considered as examples of unfavorable credit referenced, and will serve as the basis for rejection of the application.
- (1) Persons/Families with one or more accounts that are 120 days or more past due within the past three (3) years (usually designated by credit bureaus (2) years as an I-4 or R-4 rating), or
  - (2) Persons/Families with one or more outstanding collections at the time of initial application and/or collection records for non-payment of rent within the past three (3) years (usually designated by credit bureaus as an I-9 or R-9 rating), or
  - (3) Persons/Families with one or more outstanding civil judgments or civil suits within the past three (3) years at the time of application for matters other than non-payment of rent, or
  - (4) Persons/Families who have filed bankruptcy within the past three (3) years unless said bankruptcy is, in the sole judgment of the CDA, the result of a medical catastrophe.

- D. In determining eligibility for admission, the CDA shall rely upon sources of information which may include, but not be limited to: (1) the applicant (by means of interviews and/or home visits); (2) Authority records; (3) previous landlords; (4) employers; (5) family social workers; (6) parole officers; (7) court records; (8) drug treatment centers; (9) clinics; (10) physicians; (11) credit bureaus; (12) county health/safety services; (13) police departments; (14) child care providers (15) Social Security offices and; (16) utility companies.
- E. An applicant's capacity to comply with the terms of the Lease Agreement.
- F. An applicant's willingness to cooperate with the CDA.
- G. Women heads of household and male heads of households will similarly be accorded like treatment. All credit shown in the report issued by the credit bureau will reflect positively or negatively on both spouses in the absence of divorce and/or other legal documentation, brought to the attention of the CDA by the initiation of the applicants, which clearly separates the parties' credit responsibilities. In the case of unfavorable credit references, the responsibility of the CDA is limited to informing applicant families that their application has been rejected based on confidential information received from the local credit bureau. The CDA is, of course, agreeable to reappraising a credit report forwarded to the CDA by the credit bureau on behalf of the applicant which encompasses certain corrections or additions made in that report as a result of action taken by the applicant directly with the credit bureau. The application is, however, considered rejected until updated information is received from the credit-reporting agency. Waiting List Priority or Preference is suspended until such time of receipt. This suspension is limited to thirty (30) days following the date of issuance of the credit reject letter. Other qualified applicants will be contacted for the available unit during this suspension. If the application process for another qualified applicant results in the possibility for leasing before a rejected applicant's record is satisfactorily corrected, a lease will be executed for the other applicant and the reinstated applicant will be leased the next available unit of proper size.
- H. Prior to the execution of any lease between the CDA and applicant, the CDA will certify in writing that the family meets all conditions governing eligibility. Attachment 3 of the Lease Agreement.
- I. In the event of the receipt of unfavorable information with respect to an applicant, consideration shall be given to the time, nature, and extent of the applicant's conduct and to factors which might indicate a reasonable probability of favorable future conduct or financial prospects for example: evidence of rehabilitation; evidence of the applicants family's participation in or willingness to participate in

social service or other appropriate counseling service programs and availability of such programs; evidence of the applicant family's willingness to attempt to increase family income and the availability of training or employment programs in the locality.

In addition to the usual language contained in the Lease Agreement, a Resident Cooperation clause will be included, which states:

"All applicants and tenants must provide complete and accurate information and execute all forms required by the CDA to determine eligibility and other factors effecting tenancy. Information requested by the CDA shall be provided within ten (10) business days of request and only one additional ten (10) business day period will be granted as an extension. Failure or refusal to comply with the above is grounds for denial of eligibility, termination of assistance or eviction."

During execution of the Lease Agreement, all adult family members of the household will be required to place their initials next to this clause, indicating that they have read and understand what it says.

3. **Application and Certification of Eligibility:**

A. Each applicant shall be required to submit a written application for admission on a form submitted by the CDA. The CDA will promptly notify the applicant if their application is incomplete and provide opportunity for the applicant to fully complete the application. No applicant shall be added to the waiting list until the application is complete. The applicant must provide the Social Security number of all people who will live in the apartment.

B. Applications may be obtained from and submitted to the office of the CDA:

Community Development Authority  
550 E Thomas Street  
Wausau, WI 54403

C. The qualifying factors of eligibility will not be verified until the family is in a position on the waiting list to be offered a housing unit.

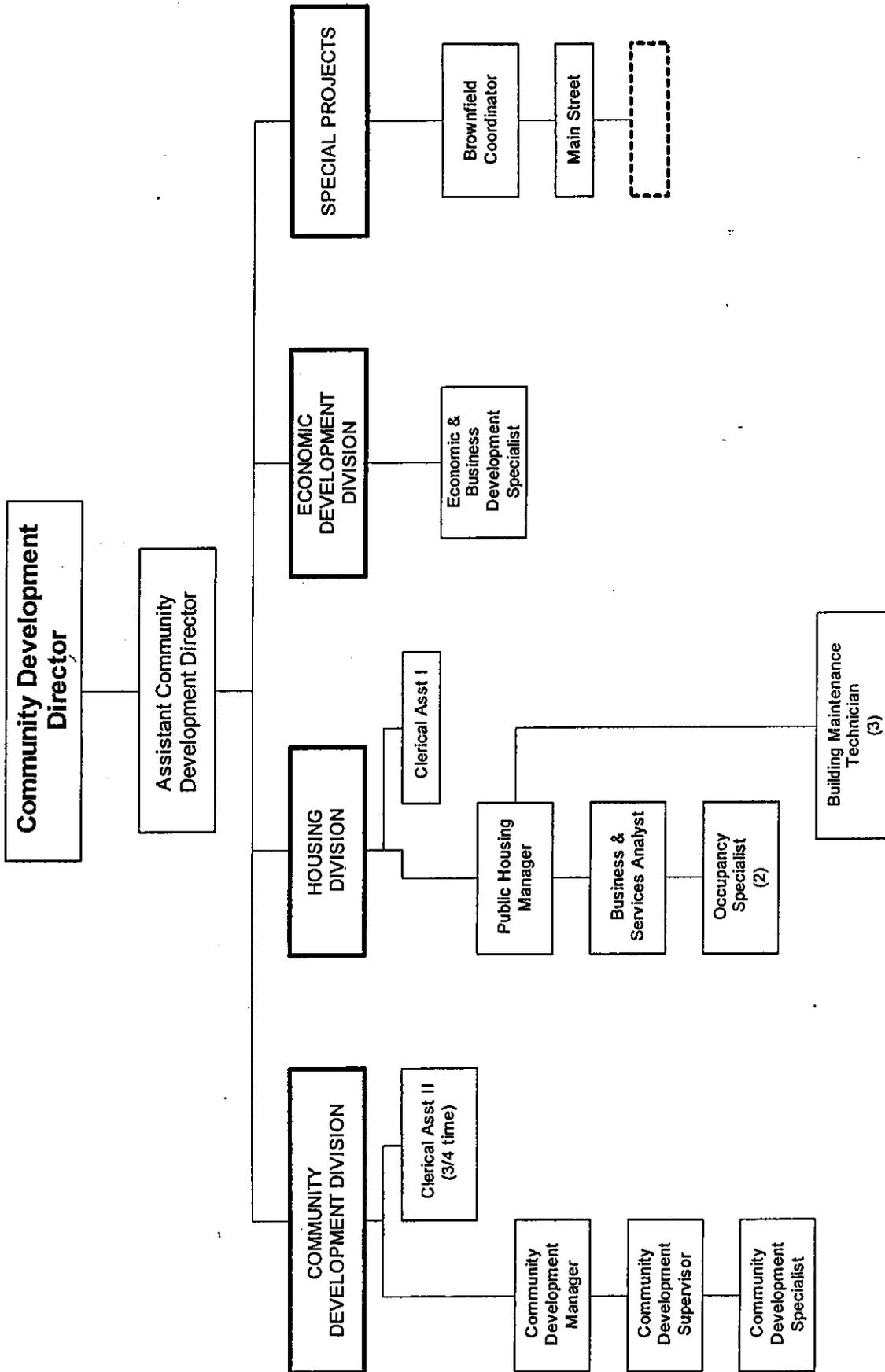
D. Applicants that are pregnant with their first child, but have not yet delivered will not be put on the waiting list until it has been confirmed that the child is born and their (newborn) Social Security number is provided on the application.

4. **Notification of Ineligibility:**

The CDA must promptly notify any applicant determined ineligible for admission to a project of the basis for such determination, and must provide the applicant upon request, within a reasonable time after the

determination is made, an opportunity for an informal hearing on such determination.

**COMMUNITY DEVELOPMENT**



October 2006

COMMUNITY DEVELOPMENT AUTHORITY OF THE CITY OF WAUSAU  
550 East Thomas Street  
Wausau, WI 54403  
(715) 845-4144

GRIEVANCE PROCEDURE

1. PURPOSE OF THE GRIEVANCE PROCEDURE

This Grievance Procedure is to assure that any Community Development Authority tenant has the opportunity for a hearing if that tenant disputes within a reasonable time any Community Development Authority action or failure to act which involves that tenant's lease with the Community Development Authority or any Community Development Authority regulations which adversely affect that individual tenant's rights, duties, welfare, or status. This procedure does not apply to disputes between tenants which do not involve the Community Development Authority or to class grievances and shall not be used by residents to negotiate policy changes with the Community Development Authority.

2. DEFINITIONS

a. Grievance is defined as any dispute which a tenant may have with respect to any Community Development Authority action or failure to act, in accordance with that individual tenant's lease or Community Development Authority regulations, when such action or failure to act adversely affects the individual tenant's rights, duties, welfare or status.

b. Complainant is defined as any Community Development Authority tenant whose grievance, as defined in 2.a above, is presented orally or in writing to the Community Development Authority office or to the site office at the project in which that tenant resides and who follows the steps outlined in this procedure to seek relief of that grievance.

c. Tenant is defined as any lessee or the remaining head of the household of any lessee's family residing in housing accommodations covered by this procedure.

### 3. PROCEDURE PRIOR TO A HEARING

#### a. Informal Discussion to Settle the Grievance.

Any grievance shall be personally presented, either orally or in writing, to the Community Development Authority office, 550 East Thomas Street, Wausau, WI 54403 or to the office of the project at which the Complainant resides, so that the grievance may be discussed informally with the appropriate member(s) of the Community Development Authority staff and settled without a hearing. Within ten (10) days after this discussion, the Community Development Authority shall prepare a summary of the discussion; one copy of this summary shall be given to the tenant and one copy retained by the Community Development Authority in that tenant's file. The summary shall specify the names of the participants, date of the meeting, the nature of the action which is proposed to resolve or dispose of the complaint, and the specific reasons for this decision, and the summary shall specify the manner by which a hearing may be obtained according to this grievance procedure.

#### b. Hearing Pre-requisite.

All grievances shall be personally presented in conformance with the procedure outlined in 3.a. above as a condition before a hearing can be granted. If the complainant can show good cause to the hearing officer or hearing panel why he or she failed to proceed according to the requirements for the informal discussion may be waived by that hearing officer or hearing panel.

#### c. Procedure to Obtain a Hearing.

If the Complainant is not satisfied with the results of the informal discussion, he or she shall submit, within ten (10) days after receipt of the summary of that discussion, a written request for a hearing. This request shall be presented to the Community Development Authority office or the office at the project where the tenant resides. The written request shall specify the specific reasons for the grievance and the action or relief sought by the tenant from the Community Development Authority.

d. Selection of the Hearing Officer or Hearing Panel.

Once a request for a hearing has been presented by a Complainant as outlined in 3.c, or that Complainant has chosen to request a waiver of the requirement for an informal discussion, as outlined in 3.b., a hearing officer or hearing panel shall be selected.

1 A hearing officer shall be appointed upon joint selection by the Community Development Authority and the Complainant.

2. If the Community Development Authority and Complainant cannot agree on a hearing officer, each shall appoint one member of a hearing panel and those two members shall jointly select a third member. If the two members so appointed cannot agree on the third member, such member shall be appointed by an independent arbitration organization or by any other third party agreed upon by the Community Development Authority and the Complainant.

e. Failure to Request a Hearing.

If the Complainant does not request a hearing in the manner outlined above, the decision offered after the informal discussion described in 3.a shall become final. Failure to request a hearing does not, however, constitute a waiver by the Complainant of his or her right thereafter to contest in an appropriate judicial proceeding the Community Development Authority's action in disposing of the complaint.

f. Grievances Involving Rental Payments.

If the grievance for which a hearing is sought involves payment by the Complainant of the amount of rent stipulated in that tenant's dwelling lease with the Community Development Authority, no hearing will be scheduled until the Complainant has paid to the Community Development Authority the rent due as of the first day of the month preceding the month in which the aggrieved incident occurred. The Complainant shall thereafter deposit that same amount of monthly rent in an escrow account monthly until the hearing officer or hearing panel has resolved the grievance. Failure to do so will result in a termination of the grievance procedure activities. In unusual circumstances, the Community Development Authority may waive this requirement. Failure to make the monthly payment does not waive any right the complainant may have to contest in any appropriate judicial proceeding the Community Development Authority's disposition of his or her grievance.

g. Scheduling the Hearing.

Within ten (10) days after the criteria specified in 3.a, b, c, and f, above have been met, the hearing officer or hearing panel shall schedule a hearing for a time and place reasonably convenient to both the Community Development Authority and the complainant. A written notification of this hearing shall be delivered to the Complainant and to the Community Development Authority and shall stipulate the time and place and the procedures governing the hearing.

4. THE HEARING

a. The hearing will be held before the hearing officer or hearing panel selected in accordance with this procedure and the Complainant shall have the right to be represented by counsel or another person he or she chooses as his or her representative.

b. The Complainant has the right to examine and copy, at his or her own expense, before the hearing all Community Development Authority documents, records, and regulations which are relevant to the hearing. Any documents not made available by the Community Development Authority after request by the Complainant may not be used by the Community Development Authority at the hearing.

c. The Complainant has the right to a private hearing but upon request shall be granted a public hearing.

d. The Complainant has the right to present evidence and arguments to support his or her complaint or challenge evidence of the Community Development Authority or project management and to cross-examine all witnesses upon whose testimony or information the Community Development Authority or project management relies.

e. The decision of the hearing officer or hearing panel shall be based solely upon the facts presented at the hearing.

f. The hearing officer or hearing panel may make a decision without holding the hearing if that officer or panel determines that the issue has already been decided in a previous grievance hearing.

g. If the Complainant or the Community Development Authority fails to appear for the scheduled hearing, the hearing officer or hearing panel may determine to post pone the hearing for no more than five (5) business days or may determine that the party not appearing has waived its right to a hearing. Both the Complainant and the Community Development Authority shall be notified of that decision by the hearing officer or hearing panel. A decision that the Complainant has waived his or her right to a hearing shall not abridge any right that Complainant may have to challenge in an appropriate judicial proceeding the action taken by the Community Development Authority or the grievance.

h. At the hearing, the Complainant must first show his or her entitlement to the relief being sought, and thereafter the Community Development Authority must justify that action or failure to act against which the complaint is directed.

i. The hearing shall be conducted informally by the hearing officer or hearing panel. Oral or written evidence pertinent to the facts and issues raised by the Complainant may be received as evidence without regard to the rules of evidence which apply to judicial proceedings. The hearing officer or hearing panel shall require all parties to conduct themselves in an orderly manner. Failure to comply with the directions of the hearing officer or hearing panel may result in the disorderly party being excluded from the hearing or in a decision unfavorable to that disorderly party.

j. Either the Community Development Authority or the Complainant may arrange to have made a transcript of the proceedings, and any interested party shall have an opportunity to purchase a copy of that transcript.

## 5. DECISION OF THE HEARING OFFICER OR HEARING PANEL

a. **Written Decision.** The hearing officer or hearing panel shall prepare a statement of their decision and the reasons for it within ten (10) days after the hearing. One copy of this statement shall be forwarded to the Complainant and one copy to the Community Development Authority. The Community Development Authority shall retain a copy in the tenant's file and shall retain another copy, with names and identifying references deleted, in a separate file for inspection by a prospective complainant or his or her representative or a future hearing officer or hearing panel.

b. Enforcement of the Decision. The decision of the hearing officer or hearing panel shall be binding, and the Community Development Authority shall take all actions, or refrain from actions, necessary to carry out that decision, unless the Community Development Authority Board of Commissioners determines, within ten (10) days after receiving the decision, and so notifies the Complainant, that:

1. The complaint did not constitute a grievance as defined in this procedure; OR
2. The decision is contrary to applicable federal, state, or local law, HUD regulations, or the Community Development Authority's annual contributions contract with HUD.

c. A decision in favor of the Community Development Authority or one which does not fully grant the relief sought by the Complainant does not abridge any right which he or she may have to a trial or judicial review in any legal proceedings which may be initiated in the matter.

## 6. COMMUNITY DEVELOPMENT AUTHORITY EVICTION ACTIONS

If a tenant has requested a hearing in accordance with this procedure on a complaint involving a Community Development Authority notice of lease termination and the hearing officer or hearing panel upholds the Community Development Authority's decision to terminate tenancy, the Community Development Authority shall not bring eviction actions in a state or local court until it has served on the tenant a notice to vacate. This notice to vacate shall not be issued prior to the mailing or delivery to the Complainant of the decision of the hearing officer or hearing panel. The notice to vacate shall be in writing and shall state that if the tenant fails to vacate the unit within the period specified by the law, or the termination date stated in the notice, whichever is later, action will be brought against that tenant and he or she may be required to pay court costs and attorney fees.

## Capital Improvement Needs

The five year Capital Improvement Plan was recently bid out. The Wausau CDA and Becher-Hoppe Associates, Inc. (the successful bidder) are assessing all the public housing properties and determining a capital improvement priority list. From this list, the five year plan will be developed.

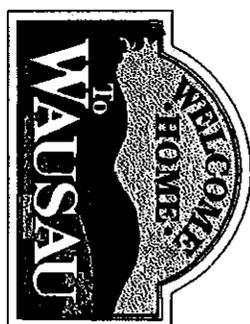
**DOES ANYONE NEED TO INSPECT THE PROPERTY?**

Yes, someone from the Community Development Department will be inspecting the home to make sure it meets Housing Quality Standards. This must be a contingency in the offer to purchase.

**WHEN DO I HAVE TO PAY THIS LOAN BACK?**

(A) The first sixty (60) months of principal and interest shall be deferred and added to the amount due at the maturity date.

(B) Two percent (2%) annual rate for months Sixty-One (61) through One Hundred Forty Four (144) inclusive and monthly payments of \$56.18 shall be based on a twelve (12) year amortization schedule of the amount of the loan principal and accrued interest at the beginning of month one.



**A  
DOWNPAYMENT  
PROGRAM  
FOR YOU**

**FROM THE CITY OF  
WAUSAU  
COMMUNITY  
DEVELOPMENT  
DEPARTMENT**

If you would like more information regarding this program or to set up an appointment, please contact Tammy Stratz or Mindy Brandenburg at 261-6680.



**WHAT WOULD QUALIFY ME FOR THIS PROGRAM?**

You must be at or below the income guidelines.

Family Size	1	2	3	4	5
	\$35,850	\$40,950	\$46,100	\$51,200	\$55,300

This must be your principal place of residence.

**WHERE CAN I PURCHASE A HOME?**

Any home that is located within the corporate limits of the City of Wausau.

**WHAT TYPE OF HOME CAN I PURCHASE?**

You can purchase any single family home that is owner occupied or vacant.

**ARE THERE ANY INELIGIBLE PROPERTIES?**

- Any home out of the corporate city limits.
- Income producing property.
- Any home that does not meet Housing Quality Standards.
- Mobile homes.
- Properties with an accepted offer to purchase.

**WHAT TYPE OF FUNDS WILL I RECEIVE?**

The City of Wausau will provide a loan for \$4,000. The applicant will contribute \$1,000.

**HOW DO I APPLY?**

The Community Development Department for the City of Wausau will be accepting applications for this program by APPOINTMENT ONLY.

**WHAT DO I NEED TO BRING IN WHEN I APPLY?**

- Previous years income tax return.
- Last six (6) consecutive paycheck stubs for all family employment.
- Verification of any additional income (social security, child support, etc.)
- Evidence of \$1,500; (\$1000 towards purchase & \$500 reserve)

**IS MY CREDIT CHECKED?**

Yes, the Community Development Department will be ordering a credit check on all applicants through a local credit agency.

**HOW WILL I KNOW IF I RECEIVE THE LOAN?**

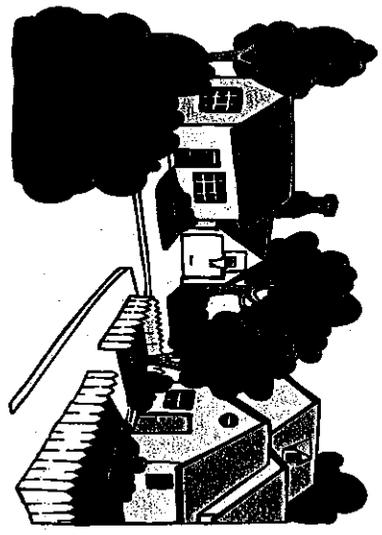
Successful applicants will receive notification in the form of a downpayment certificate executed by the City of Wausau Mayor.

**WHAT ABOUT OBTAINING A MORTGAGE?**

Each applicant will have 15 days from receipt of the downpayment certificate to present confirmation of pre-approved mortgage financing to the Community Development Department.

**HOW MUCH TIME DO I HAVE TO FIND A HOME?**

Successful applicants will have 90 days from receipt of the downpayment certificate to turn into the Community Development Department, an accepted offer to purchase on an eligible property. Extensions on certificates may be granted under certain circumstances with approval by the Community Development Department.



# PET POLICY FAMILY HOUSING

# FAMILY HOUSING PET POLICY

The Wausau Community Development Authority (WCDA) has adopted the following 'reasonable' pet requirements. This policy will be enforced by the WCDA. It is important that you read this Pet Policy carefully. It explains your rights and obligations as a pet owner.

## A. ENABLING REGULATIONS

Section 526 of the Quality Housing And Work Responsibility Act of 1998 (QHWRA) provides that residents of Public Housing may own one (1) or more common household pets. The resident must maintain each pet responsibly and in accordance with applicable state and local public health, animal control and animal anti cruelty laws and regulations, and with the policies established in The Agency Plan for the PHA. The Wausau Housing Authority has adopted 'reasonable' pet requirements.

These 'Reasonable' pet requirements incorporate the various state and local laws governing pets that include inoculating, licensing, and provides sufficient flexibility to protect the rights and privileges of other residents who choose not to own pets. In the event of an emergency or building evacuation it is the responsibility of the pet owner to remove the animal. Tenants of family housing may own common household pets in their dwelling units, provided the Wausau Community Development Authority (WCDA) has been notified and issued written approval in accordance with the following rules and regulations:

## TYPES OF DWELLING UNITS PERMITTING PETS

All residents of the WCDA are eligible for pets according to the "Pet Policy".

## TYPE OF PETS AND NUMBER PER UNIT

A common household pet is defined as a dog, cat, hamster, gerbil, goldfish, tropical fish, canary, parakeet, or lovebird. Examples of animals that are not considered common household pets for purposes of this policy include: Reptiles, amphibians, insects and other animals not listed above. No dangerous or intimidating pets, i.e., pit-bull dogs, rottweilers, or doberman pinchers, will be permitted. Heads of household shall be responsible for their pet. No guest may bring pets onto the premises. One pet per unit will be permitted i.e., one cat, one dog, one fish bowl or tank (20 gallon maximum), one cage with no more than two birds.

## REGULATION REQUIREMENTS PRIOR TO ADMISSION

Registration must show type of pet, recent picture, name, age, license and current shot information with name and address of pet's veterinarian, plus a signed responsibility care card showing the names of two (2) person(s) to call to come get the pet in the event of the tenant's illness or death.

Dogs and cats must be registered with the CDA yearly, along with proof of current dog or cat license, current inoculations, identification tag, verification of spaying/neutering and a signed verification of two interim care persons who will agree to care for the animal in the event of the absence, illness or death of the owner. If pets are left unattended for twenty-four (24) hours or more, the Community Development Authority may enter to remove the pet and transfer it to the proper authorities. The Community Development Authority accepts no cost or responsibility for the pet under such circumstances.

Residents will be refused a pet if management determines that the tenant is unable to fulfill their past or future obligations as a pet owner or adhere to the pet rules, the animal does not meet the definition of common household pet, or the temperament of the animal is considered dangerous

A pet deposit of \$400.00 shall be required for a dog or cat (in addition to the original security deposit for the occupant) to cover possible damage. Tenants shall not alter the interior of their unit, patio, or balcony to create enclosure for an animal or bird. Tenants shall not have animals chained up to the buildings or in the front yards. Animals are not to be left outside when owner is not home.

A pet deposit of \$150.00 shall be required for all other common household pets to cover possible damage.

The pet deposit will be refunded minus any applicable charges within twenty one (21) days after resident vacates the unit, or the pet is permanently removed from the unit. In the event the pet owner is incapacitated or no longer available to care for the pet, the person designated on the registration form must remove the pet.

While outside the unit, every dog or cat must be kept on a leash and accompanied by a person who is able to control it. A person must carry with them a scooper and a bag to dispose of the waste.

Litter boxes will be emptied every other day in the proper outdoor receptacle. No litter boxes may be emptied in the apartment's toilet, as the litter material will clog the drainage system.

Pet owners are liable for any damage or injury caused by their pets. Pets that are aggressive, attack or jump on people, or which cause property damage or make excessive noise, will not be allowed to be housed.

Tenants shall not feed stray or unregistered animals. This shall constitute having a pet without permission of the Authority.

## DOG REQUIREMENTS

Security deposit of \$400.00

All dogs must be at least 6 months old and completely housebroken

Dog's must be registered with the CDA yearly, along with proof of current dog license, current inoculations, and verification of spaying/neutering.

Every dog must wear a City Animal License, a valid rabies tag and a tag bearing the owners name, address and phone number. All City Animal License expire December 31, and must be renewed every year

A dog cannot be over fourteen (14) inches tall and 25 pounds when it is considered full grown.

A dog must be on a leash at all times when outside the owners unit.

No dog may stay alone in a unit overnight. It is the responsibility of the tenant, if they have to leave suddenly and/or be away overnight to take the pet elsewhere until they return. If a pet is found alone, management will refer to the Pet Removal policy

The owner of every pet will be responsible for picking up the waste (feces) left by the pet on property and immediately disposing of it in the proper outdoor receptacle

## CAT REQUIREMENTS

Security deposit \$400.00

All cats must be 6 months old and litter trained before admission.

Tenant must provide proof that the cat has been declawed.

Cats must be registered with the CDA yearly, along with proof of current cat license, current inoculations, and verification of spaying/neutering.

Every cat must wear a City Animal License, a valid rabies tag and a tag bearing the owners name, address and phone number. All City Animal License expire December 31 and must be renewed every year.

A cat cannot be over ten (10) inches tall and 15 pounds when it is considered full grown.  
Proof of yearly shots from a veterinarian.

Cat must be on a leash at all times when outside of the owners unit.

No cat may stay alone in an apartment overnight. It is the responsibility of the tenant, if they have to leave suddenly and be away overnight, take the pet elsewhere until they return. If a pet is found alone management will refer to the Pet Removal Policy.

Litter must be cleaned daily and put in a sealed plastic bag and discarded  
Cat litter shall not be disposed of by flushing down toilets. Charges for unclogging toilets or clean up of litter will be billed to and paid by the resident pet owner.

## BIRD, FISH, GERBIL AND HAMSTER OWNER REQUIREMENTS

Security deposit of \$150.00

No more than two (2) birds to a unit will be permitted, canaries, parakeets, or love birds only. No parrots.

The cage must be no larger than three (3) feet high and two (2) feet wide.

Cages must be cleaned daily and debris disposed of in a plastic bag, to be in trash immediately

Birds must be healthy and free of disease at all times.

Birds are not permitted to be left alone in a unit over two (2) days unless arrangements for daily care are made by owner.

One (1) fish aquarium only is permitted (20 gallons maximum) or one (1) large gold fish bowl

Fish may not be alone in the unit more than one (1) week, unless arrangements for daily care have been made.

Tenant must be aware when cleaning fish tanks that any water damage caused to the apartment will be billed directly to the tenant

No more than two (2) hamsters or gerbils will be permitted.

Hamsters and gerbils must be kept in a cage at all time.

Cages must be cleaned daily and debris disposed of in a plastic bag to be in trash immediately

Hamsters/Gerbils are not permitted to be left alone in a unit over two (2) days unless arrangements for daily care are made by owner.

## PET REMOVAL

Management may move to require the removal of a pet from the premises on a temporary or permanent basis for the following causes with proper notification given:

Creation of a nuisance

Excessive pet noise

Failure to provide proper certifications

Damage to the residential unit and/or yard

Leaving a pet unattended for more than time allotted

Failure of tenant to provide adequate/appropriate care

Tenant serious illness and/or death

Failure to observe any other rule contained in this pet policy

adopted 9/12/2000  
reso1# 00-004

Wausau Community Development Authority  
550 East Thomas Street  
Wausau, WI 54403  
(715) 845-4144

### **Public Housing Pet Policy**

Pets have been allowed in public housing as of February 16, 1984, provided the Community Development Authority has been notified and issued written approval in accordance with the rules and regulations of this policy. It is important that you read this policy carefully as it explains your rights and obligations as a pet owner. This policy will be enforced by the CDA.

1. A common household pet is defined as a dog, cat, hamster, gerbil, goldfish, tropical fish, canary, parakeet, or lovebird. Examples of animals that are not considered common household pets for purposes of this policy include: reptiles, amphibians, insects and other animals not listed above. No dangerous or intimidating pets, i.e., Pit-bulls, Rottweilers, or Doberman pinchers will be permitted. Heads of household shall be responsible for their pet and shall not alter the interior of their unit to create enclosure for an animal. No guests may bring pets onto the premises.
2. One (1) common household pet per unit will be permitted, i.e., one cat, one dog, one fish bowl or tank (20 gallon maximum), one cage with no more than two birds. All dogs must be completely housebroken and cats must be litter trained before admission. A dog cannot be over 14 inches tall and must weigh 25 lbs or less when considered full-grown.
3. Dogs and cats must be registered with the CDA yearly, by submitting proof of current dog or cat license, current inoculations, verification of spaying/neutering, and a signed verification of two interim care persons who will agree to care for the animal in the event of absence, illness, or death of the owner. Though birds, fish, gerbils, and hamsters need not be registered, the CDA must be provided a record of two interim care persons who will care for the animal in the absence, illness, or death of the owner.
4. Every dog and cat must wear a City of Wausau animal license, a valid rabies tag, and identification bearing the owner's name, address, and phone number. All licenses expire on December 31<sup>st</sup> of each year.
5. Female dogs and cats over six (6) months must be spayed and males over eight (8) months neutered, unless a letter is received from a licensed veterinarian giving medical reason why such is detrimental to pet's health.
6. If pets are left unattended for twenty-four (24) hours or more, the CDA may enter to remove the pet and transfer it to the proper authorities. The CDA accepts no costs or responsibility for the pet under such circumstances.

7. A pet deposit of \$300.00 shall be required for a dog or cat (in addition to the original security deposit for the occupant) to cover possible damages. A pet deposit of \$150.00 shall be required for all other common household pets to cover possible damages.
8. The pet deposit will be refunded minus any applicable charges within twenty eight (28) days after the resident vacates the unit, or the pet owner is incapacitated or no longer available to care for the pet, the person designated on the registration form must remove the pet.
9. While outside the unit, every dog or cat must be kept on a leash and must be accompanied by a person who is able to control it. A person must carry with them a scooper and a bag to dispose of the waste. No animal may be tied outside.
10. The owner of every pet is responsible for picking up the waste (feces) left by the pet and immediately disposed of in the proper outdoor receptacle. Litter boxes must be emptied every other day in the proper outdoor receptacle. No litter boxes may be emptied in the apartment's toilet as the litter material will clog the drainage system. Tenant shall take adequate precautions to eliminate any pet odors within or around the unit and maintain the unit in a sanitary condition at all times.
11. No pet may make excessive noise which disrupts the peace of the complex. Animals will be walked only in designated areas. Except for a leader dog, animals will not be allowed in the dining room, kitchen, pool room, laundry, lounge, library, main lobby, parking lot, and lawn area (other than designated). Animals may be walked on public and private sidewalks, but not allowed to defecate in these areas or the public street or private parking lot.
12. Pet owners are liable for any damage or injury caused by their pets. Pets that are aggressive, attack, or jump on people, cause property damage, or make excessive noise, will not be allowed to be housed.
13. Tenants are prohibited from feeding stray animals. The feeding of stray animals shall constitute having a pet without the permission of the CDA.
14. Any tenant that receives three (3) letters on violations and a letter of intent from the CDA, may be required, after a private conference, to submit a signed letter stating that the animal is no longer on the premises, to prevent any further legal action by the CDA.
15. Violation of this Pet Policy three (3) times within a twelve (12) month period will be grounds for eviction. However, if the third (3<sup>rd</sup>) violation was for item #5 and/or #9, and you comply, your violations revert to two (2).

# Certification for a Drug-Free Workplace

U.S. Department of Housing and Urban Development

Applicant Name

Wausau Housing Authority

Program/Activity Receiving Federal Grant Funding

Public Housing / Section 8 Housing Choice Voucher

Acting on behalf of the above named Applicant as its Authorized Official, I make the following certifications and agreements to the Department of Housing and Urban Development (HUD) regarding the sites listed below:

I certify that the above named Applicant will or will continue to provide a drug-free workplace by:

a. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the Applicant's workplace and specifying the actions that will be taken against employees for violation of such prohibition.

b. Establishing an on-going drug-free awareness program to inform employees ---

(1) The dangers of drug abuse in the workplace;

(2) The Applicant's policy of maintaining a drug-free workplace;

(3) Any available drug counseling, rehabilitation, and employee assistance programs; and

(4) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.

c. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph a.;

d. Notifying the employee in the statement required by paragraph a. that, as a condition of employment under the grant, the employee will ---

(1) Abide by the terms of the statement; and

(2) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;

e. Notifying the agency in writing, within ten calendar days after receiving notice under subparagraph d.(2) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant;

f. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph d.(2), with respect to any employee who is so convicted ---

(1) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or

(2) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;

g. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs a. thru f.

2. **Sites for Work Performance.** The Applicant shall list (on separate pages) the site(s) for the performance of work done in connection with the HUD funding of the program/activity shown above: Place of Performance shall include the street address, city, county, State, and zip code. Identify each sheet with the Applicant name and address and the program/activity receiving grant funding.)

550 E Thomas Street  
Wausau, WI 54403

Check here  if there are workplaces on file that are not identified on the attached sheets.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

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

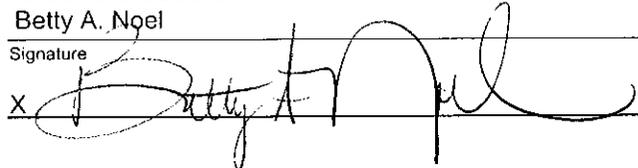
Name of Authorized Official

Betty A. Noel

Title

Public Housing Manager

Signature

X 

Date

September 26, 2008

form HUD-50070 (3/98)

ref. Handbooks 7417.1, 7475.13, 7485.1 & 3

## Resident Advisory Board

The Wausau Community development Authority is in the process of creating a Resident Advisory Board. The Resident Advisory Board is being created to better serve the clients of public housing. The board will be comprised of individuals that represent the residents assisted by public housing.

The members of the Resident Advisory Board will be appointed by the Executive Director of Community Development and shall serve a term of three years. There shall be two residents from Riverview Towers that will be members, and there will be one resident of the scattered site housing as a member. Staff for the Resident Advisory Board shall be the Deputy Directory of Public Housing and the Community Development Administrator. The board shall meet no less then twice a year and hold a public hearing to receive comments regarding input to the Annual Plan.

## PHA Resident Board Member

1. Dorothy Korzilius

**CAPITAL FUND PROGRAM TABLES START HERE**

<b>Annual Statement/Performance and Evaluation Report</b>					
<b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary</b>					
PHA Name: Wausau Housing Authority 550 E. Thomas Street Wausau, WI 54403		Grant Type and Number Capital Fund Program Grant No: WI39-501-04 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 2)					
<input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements				
4	1410 Administration	27000.00	4064.24		
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	0.00	27588.10		9794.34
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	228881.00	221681.71		26789.67
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures	20000.00	4775.00		4775.00
13	1475 Nondwelling Equipment	0.00	17771.95		17018.52
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				

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

PHA Name: Wausau Housing Authority 550 E. Thomas Street Wausau, WI 54403	Grant Type and Number Capital Fund Program Grant No: WI39-501-04 Replacement Housing Factor Grant No:	Federal FY of Grant: 2004
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Original Annual Statement  Reserve for Disasters/ Emergencies  Revised Annual Statement (revision no: 2)  
 Performance and Evaluation Report for Period Ending:  Final Performance and Evaluation Report

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

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

PHA Name: Wausau Housing Authority 550 E. Thomas Street, Wausau ,WI 54403		Grant Type and Number Capital Fund Program Grant No: WI39-501-04 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHAWIDE	Paint Office	1470			4775.00		4775.00	
002	Install HRV System	1460			21256.94			
PHAWIDE	Office Furniture	1475			16500.95		15747.52	
PHAWIDE	Tailgate Spreader	1475			1271.00		1271.00	
001	Access Door Panel	1460			5008.03		5008.03	
002	Replace Windows	1460			11645.00		11645.00	
002	Replace Siding	1460			169430.97			
PHAWIDE	Admin	1410			4064.24			
PHAWIDE	Fees and Costs	1430			27588.10		9794.34	
001	Boiler Upgrade	1460			5320.82		5320.82	
001	Generator Upgrade	1460			4204.13			
002	Water Heater Replacement	1460			3700.00		3700.00	
001	Exit Light Upgrade	1460			1115.82		1115.82	

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

PHA Name: Wausau Housing Authority 550 E. Thomas Street, Wausau, WI 54403	<b>Grant Type and Number</b> Capital Fund Program No: WI39-501-04 Replacement Housing Factor No:	<b>Federal FY of Grant: 2004</b>
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Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PHAWIDE	09/30/06			09/30/08			
002	09/30/06			09/30/08			
PHAWIDE	09/30/06			09/30/08			
PHAWIDE	09/30/06			09/30/08			
001	09/30/06			09/30/08			
002	09/30/06			09/30/08			
002	09/30/06			09/30/08			
PHAWIDE	09/30/06			09/30/08			
PHAWIDE	09/30/06			09/30/08			
001	09/30/06			09/30/08			
001	09/30/06			09/30/08			
002	09/30/06			09/30/08			
001	09/30/06			09/30/08			

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

PHA Name					<input type="checkbox"/> <b>Original 5-Year Plan</b> <input type="checkbox"/> <b>Revision No:</b>	
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: PHA FY:	Work Statement for Year 3 FFY Grant: PHA FY:	Work Statement for Year 4 FFY Grant: PHA FY:	Work Statement for Year 5 FFY Grant: PHA FY:	
	Annual Statement					
CFP Funds Listed for 5-year planning						
Replacement Housing Factor Funds						

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

Activities for Year 1	Activities for Year : ____ FFY Grant: PHA FY:			Activities for Year: ____ FFY Grant: PHA FY:		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See						
Annual						
Statement						
	<b>Total CFP Estimated Cost</b>		\$			\$



# Capital Fund Program Five-Year Action Plan

## Part I: Summary

*S A M P L E*

PHA Name <i>Anytown Housing Authority</i>					
		<input type="checkbox"/> <b>Original 5-Year Plan</b> <input type="checkbox"/> <b>Revision No:</b>			
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2002 PHA FY: 2002	Work Statement for Year 3 FFY Grant: 2003 PHA FY: 2003	Work Statement for Year 4 FFY Grant: 2004 PHA FY: 2004	Work Statement for Year 5 FFY Grant: 2005 PHA FY: 2005
	<b>Annual Statement</b>				
<i>10-01/Main Street</i>		<i>\$80,000</i>	<i>\$36,000</i>	<i>\$65,000</i>	<i>\$55,000</i>
<i>10-02/Broadway</i>		<i>\$90,000</i>	<i>\$40,900</i>	<i>\$40,000</i>	<i>\$43,000</i>
<i>HA-wide</i>		<i>\$100,000</i>	<i>\$50,000</i>	<i>\$35,000</i>	<i>\$27,000</i>
CFP Funds Listed for 5-year planning		<i>\$270,000</i>	<i>\$162,900</i>	<i>\$140,000</i>	<i>125,000</i>
Replacement Housing Factor Funds		<i>\$40,000</i>			





**CAPITAL FUND PROGRAM TABLES START HERE**

<b>Annual Statement/Performance and Evaluation Report</b>						
<b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary</b>						
PHA Name: Wausau Housing Authority 550 E. Thomas Street Wausau, WI 54403		Grant Type and Number Capital Fund Program Grant No: WI39-501-05 Replacement Housing Factor Grant No:			Federal FY of Grant: 2005	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 2)						
<input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report						
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost		
		Original	Revised	Obligated	Expended	
1	Total non-CFP Funds					
2	1406 Operations	278947.00	14795.00			
3	1408 Management Improvements					
4	1410 Administration					
5	1411 Audit					
6	1415 Liquidated Damages					
7	1430 Fees and Costs	0.00	20994.10			
8	1440 Site Acquisition					
9	1450 Site Improvement					
10	1460 Dwelling Structures	0.00	243157.90			
11	1465.1 Dwelling Equipment—Nonexpendable					
12	1470 Nondwelling Structures					
13	1475 Nondwelling Equipment					
14	1485 Demolition					
15	1490 Replacement Reserve					
16	1492 Moving to Work Demonstration					
17	1495.1 Relocation Costs					
18	1499 Development Activities					
19	1501 Collaterization or Debt Service					

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

PHA Name: Wausau Housing Authority 550 E. Thomas Street Wausau, WI 54403	Grant Type and Number Capital Fund Program Grant No: WI39-501-05 Replacement Housing Factor Grant No:	Federal FY of Grant: 2005
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Original Annual Statement  Reserve for Disasters/ Emergencies  Revised Annual Statement (revision no: 2)  
 Performance and Evaluation Report for Period Ending:  Final Performance and Evaluation Report

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



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

PHA Name: Wausau Housing Authority 550 E. Thomas Street, Wausau, WI 54403	<b>Grant Type and Number</b> Capital Fund Program No: WI39-501-05 Replacement Housing Factor No:	<b>Federal FY of Grant: 2005</b>
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Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
002	9/30/07			9/30/09			
PHAWIDE	9/30/07			9/30/09			
PHAWIDE	9/30/07			9/30/09			
002	9/30/07			9/30/09			
002	9/30/07			9/30/09			
001	9/30/07			9/30/09			



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

Activities for Year 1	Activities for Year : ____ FFY Grant: PHA FY:			Activities for Year: ____ FFY Grant: PHA FY:		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See						
Annual						
Statement						
	<b>Total CFP Estimated Cost</b>		\$			\$



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

*S A M P L E*

PHA Name <i>Anytown Housing Authority</i>						<input type="checkbox"/> <b>Original 5-Year Plan</b> <input type="checkbox"/> <b>Revision No:</b>
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2002 PHA FY: 2002	Work Statement for Year 3 FFY Grant: 2003 PHA FY: 2003	Work Statement for Year 4 FFY Grant: 2004 PHA FY: 2004	Work Statement for Year 5 FFY Grant: 2005 PHA FY: 2005	
	<b>Annual Statement</b>					
<i>10-01/Main Street</i>		<i>\$80,000</i>	<i>\$36,000</i>	<i>\$65,000</i>	<i>\$55,000</i>	
<i>10-02/Broadway</i>		<i>\$90,000</i>	<i>\$40,900</i>	<i>\$40,000</i>	<i>\$43,000</i>	
<i>HA-wide</i>		<i>\$100,000</i>	<i>\$50,000</i>	<i>\$35,000</i>	<i>\$27,000</i>	
CFP Funds Listed for 5-year planning		<i>\$270,000</i>	<i>\$162,900</i>	<i>\$140,000</i>	<i>125,000</i>	
Replacement Housing Factor Funds		<i>\$40,000</i>				





**CAPITAL FUND PROGRAM TABLES START HERE**

<b>Annual Statement/Performance and Evaluation Report</b>						
<b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary</b>						
PHA Name: Wausau Housing Authority 550 E. Thomas Street Wausau, WI 54403		Grant Type and Number Capital Fund Program Grant No: WI39-501-06 Replacement Housing Factor Grant No:			Federal FY of Grant: 2006	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 1)						
<input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report						
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost		
		Original	Revised	Obligated	Expended	
1	Total non-CFP Funds					
2	1406 Operations					
3	1408 Management Improvements					
4	1410 Administration	25000.00	0.00			
5	1411 Audit					
6	1415 Liquidated Damages					
7	1430 Fees and Costs					
8	1440 Site Acquisition					
9	1450 Site Improvement					
10	1460 Dwelling Structures	221748.00	246748.00			
11	1465.1 Dwelling Equipment—Nonexpendable					
12	1470 Nondwelling Structures					
13	1475 Nondwelling Equipment					
14	1485 Demolition					
15	1490 Replacement Reserve					
16	1492 Moving to Work Demonstration					
17	1495.1 Relocation Costs					
18	1499 Development Activities					
19	1501 Collateralization or Debt Service					

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

PHA Name: Wausau Housing Authority 550 E. Thomas Street Wausau, WI 54403	Grant Type and Number Capital Fund Program Grant No: WI39-501-06 Replacement Housing Factor Grant No:	Federal FY of Grant: 2006
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Original Annual Statement  Reserve for Disasters/ Emergencies  Revised Annual Statement (revision no: 1)  
 Performance and Evaluation Report for Period Ending:  Final Performance and Evaluation Report

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





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

PHA Name					<input type="checkbox"/> <b>Original 5-Year Plan</b> <input type="checkbox"/> <b>Revision No:</b>	
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: PHA FY:	Work Statement for Year 3 FFY Grant: PHA FY:	Work Statement for Year 4 FFY Grant: PHA FY:	Work Statement for Year 5 FFY Grant: PHA FY:	
	Annual Statement					
CFP Funds Listed for 5-year planning						
Replacement Housing Factor Funds						

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

Activities for Year 1	Activities for Year : ____ FFY Grant: PHA FY:			Activities for Year: ____ FFY Grant: PHA FY:		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See						
Annual						
Statement						
	<b>Total CFP Estimated Cost</b>		\$			\$



# Capital Fund Program Five-Year Action Plan

## Part I: Summary

*S A M P L E*

PHA Name <i>Anytown Housing Authority</i>					
		<input type="checkbox"/> <b>Original 5-Year Plan</b> <input type="checkbox"/> <b>Revision No:</b>			
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2002 PHA FY: 2002	Work Statement for Year 3 FFY Grant: 2003 PHA FY: 2003	Work Statement for Year 4 FFY Grant: 2004 PHA FY: 2004	Work Statement for Year 5 FFY Grant: 2005 PHA FY: 2005
	<b>Annual Statement</b>				
<i>10-01/Main Street</i>		<i>\$80,000</i>	<i>\$36,000</i>	<i>\$65,000</i>	<i>\$55,000</i>
<i>10-02/Broadway</i>		<i>\$90,000</i>	<i>\$40,900</i>	<i>\$40,000</i>	<i>\$43,000</i>
<i>HA-wide</i>		<i>\$100,000</i>	<i>\$50,000</i>	<i>\$35,000</i>	<i>\$27,000</i>
CFP Funds Listed for 5-year planning		<i>\$270,000</i>	<i>\$162,900</i>	<i>\$140,000</i>	<i>125,000</i>
Replacement Housing Factor Funds		<i>\$40,000</i>			





**CAPITAL FUND PROGRAM TABLES START HERE**

<b>Annual Statement/Performance and Evaluation Report</b>						
<b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary</b>						
PHA Name: Wausau Housing Authority 550 E. Thomas Street Wausau, WI 54403		Grant Type and Number Capital Fund Program Grant No: WI39-501-07 Replacement Housing Factor Grant No:			Federal FY of Grant: 2007	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 2)						
<input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report						
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost		
		Original	Revised	Obligated	Expended	
1	Total non-CFP Funds					
2	1406 Operations	12,735.00	70,221.00			
3	1408 Management Improvements					
4	1410 Administration					
5	1411 Audit					
6	1415 Liquidated Damages					
7	1430 Fees and Costs		20,073.50			
8	1440 Site Acquisition					
9	1450 Site Improvement					
10	1460 Dwelling Structures	218,000.00	140,440.50			
11	1465.1 Dwelling Equipment—Nonexpendable					
12	1470 Nondwelling Structures					
13	1475 Nondwelling Equipment					
14	1485 Demolition					
15	1490 Replacement Reserve					
16	1492 Moving to Work Demonstration					
17	1495.1 Relocation Costs					
18	1499 Development Activities					
19	1501 Collaterization or Debt Service					

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

PHA Name: Wausau Housing Authority 550 E. Thomas Street Wausau, WI 54403	Grant Type and Number Capital Fund Program Grant No: WI39-501-07 Replacement Housing Factor Grant No:	Federal FY of Grant: 2007
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Original Annual Statement  Reserve for Disasters/ Emergencies  Revised Annual Statement (revision no: 2)  
 Performance and Evaluation Report for Period Ending:  Final Performance and Evaluation Report

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

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

PHA Name: Wausau Housing Authority 550 E. Thomas Street, Wausau ,WI 54403		Grant Type and Number Capital Fund Program Grant No: WI39-501-07 Replacement Housing Factor Grant No:			Federal FY of Grant: 2007			
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
002	Replace Windows	1460			35752.31			
PHAWIDE	Fees & Costs	1430			20073.50			
PHAWIDE	Office Roof Replacement	1460			10924.14			
001	Public Corridor Carpet	1460			60507.09			
001	Exit Stair Paneling/Drywall	1460			5766.10			
001	Dining Hall Ceiling Tile	1460			7819.43			
002	Insulation/Air Sealing	1460			19671.43			
PHAWIDE	Operations	1406			70221.00			

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

PHA Name: Wausau Housing Authority 550 E. Thomas Street, Wausau, WI 54403	<b>Grant Type and Number</b> Capital Fund Program No: WI39-501-07 Replacement Housing Factor No:	<b>Federal FY of Grant: 2007</b>
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Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
002	09/12/09			09/12/11			
PHAWIDE	09/12/09			09/12/11			
PHAWIDE	09/12/09			09/12/11			
001	09/12/09			09/12/11			
001	09/12/09			09/12/11			
001	09/12/09			09/12/11			
002	09/12/09			09/12/11			
PHA WIDE	09/12/09			09/12/11			



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

Activities for Year 1	Activities for Year : ____ FFY Grant: PHA FY:			Activities for Year: ____ FFY Grant: PHA FY:		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See						
Annual						
Statement						
	<b>Total CFP Estimated Cost</b>		\$			\$



# Capital Fund Program Five-Year Action Plan

## Part I: Summary

*S A M P L E*

PHA Name <i>Anytown Housing Authority</i>					
		<input type="checkbox"/> <b>Original 5-Year Plan</b> <input type="checkbox"/> <b>Revision No:</b>			
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2002 PHA FY: 2002	Work Statement for Year 3 FFY Grant: 2003 PHA FY: 2003	Work Statement for Year 4 FFY Grant: 2004 PHA FY: 2004	Work Statement for Year 5 FFY Grant: 2005 PHA FY: 2005
	<b>Annual Statement</b>				
<i>10-01/Main Street</i>		<i>\$80,000</i>	<i>\$36,000</i>	<i>\$65,000</i>	<i>\$55,000</i>
<i>10-02/Broadway</i>		<i>\$90,000</i>	<i>\$40,900</i>	<i>\$40,000</i>	<i>\$43,000</i>
<i>HA-wide</i>		<i>\$100,000</i>	<i>\$50,000</i>	<i>\$35,000</i>	<i>\$27,000</i>
CFP Funds Listed for 5-year planning		<i>\$270,000</i>	<i>\$162,900</i>	<i>\$140,000</i>	<i>125,000</i>
Replacement Housing Factor Funds		<i>\$40,000</i>			



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

***SAMPLE (continued)***

Activities for Year :__4__ FFY Grant: 2004 PHA FY: 2004			Activities for Year: _5__ FFY Grant: 2005 PHA FY: 2005		
<b>Development Name/Number</b>	<b>Major Work Categories</b>	<b>Estimated Cost</b>	<b>Development Name/Number</b>	<b>Major Work Categories</b>	<b>Estimated Cost</b>
10-01/Main Street	Storage sheds and landscaping	\$65,000	10-01/Main Street	Replace bathroom tile	\$55,000
10-02/Broadway	Tub/shower replacement	\$40,000	10-02/Broadway	New gutters and interior doors	\$43,000
HA-wide	Lead-based paint abatement	\$35,000	HA-wide	Office Furniture	\$27,000
<b>Total CFP Estimated Cost</b>		\$140,000			\$125,000

## CAPITAL FUND PROGRAM TABLES START HERE

<b>Annual Statement/Performance and Evaluation Report</b> <b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary</b>					
<b>PHA Name</b> Wausau Housing Authority		<b>Grant Type and Number</b> Capital Fund Program Grant No: WI39P03150108 Replacement Housing Factor Grant No		<b>Federal FY of Grant:</b> 2008	
<input checked="" type="checkbox"/> <b>Original Annual Statement</b> <input type="checkbox"/> <b>Reserve for Disasters/ Emergencies</b> <input type="checkbox"/> <b>Revised Annual Statement revision no:</b> <input type="checkbox"/> <b>Performance and Evaluation Report for Period Ending:</b> <input type="checkbox"/> <b>Final Performance and Evaluation Report</b>					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	48,706.00			
3	1408 Management Improvements				
4	1410 Administration	24,353.00			
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	24,353.00			
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures	110,149.00			
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	35,970.00			
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				

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

<b>PHA Name</b> Wausau Housing Authority	<b>Grant Type and Number</b> Capital Fund Program Grant No: WI39P03150108 Replacement Housing Factor Grant No	<b>Federal FY of Grant:</b> 2008
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Original Annual Statement  Reserve for Disasters/ Emergencies  Revised Annual Statement revision no:  
 Performance and Evaluation Report for Period Ending:  Final Performance and Evaluation Report

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



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

PHA Name: Wausau Housing Authority 550 E Thomas Street, Wausau, WI 54403	Grant Type and Number Capital Fund Program No: WI39P03150108 Replacement Housing Factor No:	Federal FY of Grant: 2008
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Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PHA WIDE	6/1/10			6/1/12			
PHA WIDE	6/1/10			6/1/12			
PHA WIDE	6/1/10			6/1/12			
001	6/1/10			6/1/12			
002	6/1/10			6/1/12			
PHA WIDE	6/1/10			6/1/12			



## CAPITAL FUND PROGRAM TABLES START HERE

<b>Annual Statement/Performance and Evaluation Report</b>					
<b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary</b>					
PHA Name: Wausau Housing Authority 550 E. Thomas Street Wausau, WI 54403		Grant Type and Number Capital Fund Program Grant No: WI39-502-06 Replacement Housing Factor Grant No:		Federal FY of Grant: 2006	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 1)					
<input type="checkbox"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures		20877.00		
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				

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

PHA Name: Wausau Housing Authority 550 E. Thomas Street Wausau, WI 54403	Grant Type and Number Capital Fund Program Grant No: WI39-502-06 Replacement Housing Factor Grant No:	Federal FY of Grant: 2006
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Original Annual Statement  Reserve for Disasters/ Emergencies  Revised Annual Statement (revision no: 1)  
 Performance and Evaluation Report for Period Ending:  Final Performance and Evaluation Report

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





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

PHA Name					<input type="checkbox"/> <b>Original 5-Year Plan</b> <input type="checkbox"/> <b>Revision No:</b>	
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: PHA FY:	Work Statement for Year 3 FFY Grant: PHA FY:	Work Statement for Year 4 FFY Grant: PHA FY:	Work Statement for Year 5 FFY Grant: PHA FY:	
	Annual Statement					
CFP Funds Listed for 5-year planning						
Replacement Housing Factor Funds						

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

Activities for Year 1	Activities for Year : ____ FFY Grant: PHA FY:			Activities for Year: ____ FFY Grant: PHA FY:		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See						
Annual						
Statement						
	<b>Total CFP Estimated Cost</b>		\$			\$



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

*S A M P L E*

PHA Name <i>Anytown Housing Authority</i>					
		<input type="checkbox"/> <b>Original 5-Year Plan</b> <input type="checkbox"/> <b>Revision No:</b>			
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2002 PHA FY: 2002	Work Statement for Year 3 FFY Grant: 2003 PHA FY: 2003	Work Statement for Year 4 FFY Grant: 2004 PHA FY: 2004	Work Statement for Year 5 FFY Grant: 2005 PHA FY: 2005
	<b>Annual Statement</b>				
<i>10-01/Main Street</i>		<i>\$80,000</i>	<i>\$36,000</i>	<i>\$65,000</i>	<i>\$55,000</i>
<i>10-02/Broadway</i>		<i>\$90,000</i>	<i>\$40,900</i>	<i>\$40,000</i>	<i>\$43,000</i>
<i>HA-wide</i>		<i>\$100,000</i>	<i>\$50,000</i>	<i>\$35,000</i>	<i>\$27,000</i>
CFP Funds Listed for 5-year planning		<i>\$270,000</i>	<i>\$162,900</i>	<i>\$140,000</i>	<i>125,000</i>
Replacement Housing Factor Funds		<i>\$40,000</i>			



