

PHA 5-Year and Annual Plan	U.S. Department of Housing and Urban Development Office of Public and Indian Housing	OMB No. 2577-0226 Expires 4/30/2011
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1.0	PHA Information PHA Name: <u>Montrose County Housing Authority</u> PHA Code: <u>CO087</u> PHA Type: <input checked="" type="checkbox"/> Small <input checked="" type="checkbox"/> High Performing <input type="checkbox"/> Standard <input checked="" type="checkbox"/> HCV (Section 8) PHA Fiscal Year Beginning: (MM/YYYY): _____				
2.0	Inventory (based on ACC units at time of FY beginning in 1.0 above) Number of PH units: <u>0</u> Number of HCV units: <u>268</u>				
3.0	Submission Type <input checked="" type="checkbox"/> 5-Year and Annual Plan <input type="checkbox"/> Annual Plan Only <input type="checkbox"/> 5-Year Plan Only				
4.0	PHA Consortia <input type="checkbox"/> PHA Consortia: (Check box if submitting a joint Plan and complete table below.)				
	Participating PHAs	PHA Code	Program(s) Included in the Consortia	Programs Not in the Consortia	No. of Units in Each Program
	PHA 1:				PH HCV
	PHA 2:				
	PHA 3:				
5.0	5-Year Plan. Complete items 5.1 and 5.2 only at 5-Year Plan update.				
5.1	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 for the next five years: "Taking care of affordable housing needs in Montrose County"				
5.2	Goals and Objectives. Identify the PHA's quantifiable goals and objectives that will enable the PHA to serve the needs of low-income and very low-income, and extremely low-income families for the next five years. Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5-Year Plan. We actually met every single one of our goals that were established in the last 5-year plan 2004-2009. We applied for extra vouchers each year but the freeze on vouchers precluded getting any additional. We built 91 new units of low-income affordable housing with the Sunshine Peak Apartments. We worked with several developers, one of which is in the process of developing 23 units of single family affordable units. We continued to work toward self-sufficiency by offering the program to every HCV recipient and encouraged them to sign up. We applied for housing funds from both the city of Montrose and the county of Montrose in case they had any more funding opportunities for housing. The county agreed to sponsor a CDBG rant that netted \$571,696 for an senior assisted living project. We developed a homeownership alternative for clients by signing an intergovernmental agreement with Delta Housing Authority and we participate regularly with a consortium of other regional housing authorities on the western slope of Colorado. The board met numerous times throughout 2009 and defined the following long-term strategic plans and objectives: <ol style="list-style-type: none"> 1) Develop a 15-Unit Senior Housing Project in Nucla, CO 2) Work on forming a closer alliance with Montrose County health and human services personnel and eventually move the administrative office to Montrose. 3) Continue to develop affordable housing in keeping with the needs outlined in the 2009 Needs Assessment 4) Work to acquire additional land for the development of future affordable housing 5) Stay abreast of changing legislation and take advantage of funding opportunities as they come up. 6) Work with other agencies in Montrose County to develop a long-term solution for homelessness. 				

6.0	<p>PHA Plan Update</p> <p>(a) Identify all PHA Plan elements that have been revised by the PHA since its last Annual Plan submission:</p> <p>We gave up trying to get additional Section 8 Vouchers until after the new administration was appointed in Washington D.C. We abandoned the original plan to rehabilitate the farm labor dormitory in Olathe as the board decided it would not guarantee that the vacancy rate would go down and the board did not want to renew the additional 20 year deed restrictions. We also decided to work with the Volunteers of America in developing a senior housing project in Nucla, Colorado. We also decided that we needed additional training for all staff in the area of Fair Housing and Tax Credits. We investigated ways to take advantage of private activity bonds (PABs) when they were introduced.</p> <p>(b) Identify the specific location(s) where the public may obtain copies of the 5-Year and Annual PHA Plan. For a complete list of PHA Plan elements, see Section 6.0 of the instructions.</p> <p>Copies of the 5-Year and Annual PHA Plan are available at the Montrose County Housing Authority 222 Hap Court Olathe, CO 81425 and they are also available by phone at (970)323-5445 x14. A copy is also available at our official corporate website: www.montroshousingauthority.com</p>
	<p>Hope VI, Mixed Finance Modernization or Development, Demolition and/or Disposition, Conversion of Public Housing, Homeownership Programs, and Project-based Vouchers. <i>Include statements related to these programs as applicable.</i></p>
8.0	<p>Capital Improvements. Please complete Parts 8.1 through 8.3, as applicable. Not Applicable – We have no public housing projects</p>
8.1	<p>Capital Fund Program Annual Statement/Performance and Evaluation Report. As part of the PHA 5-Year and Annual Plan, annually complete and submit the <i>Capital Fund Program Annual Statement/Performance and Evaluation Report</i>, form HUD-50075.1, for each current and open CFP grant and CFFP financing.</p>
8.2	<p>Capital Fund Program Five-Year Action Plan. As part of the submission of the Annual Plan, PHAs must complete and submit the <i>Capital Fund Program Five-Year Action Plan</i>, form HUD-50075.2, and subsequent annual updates (on a rolling basis, e.g., drop current year, and add latest year for a five year period). Large capital items must be included in the Five-Year Action Plan.</p>
8.3	<p>Capital Fund Financing Program (CFFP). <input type="checkbox"/> Check if the PHA proposes to use any portion of its Capital Fund Program (CFP)/Replacement Housing Factor (RHF) to repay debt incurred to finance capital improvements.</p>

Housing Needs. Based on information provided by the applicable Consolidated Plan, information provided by HUD, and other generally available data, make a reasonable effort to identify the housing needs of the low-income, very low-income, and extremely low-income families who reside in the jurisdiction served by the PHA, including elderly families, families with disabilities, and households of various races and ethnic groups, and other families who are on the public housing and Section 8 tenant-based assistance waiting lists. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. Here is a recent extract from the 2009 Needs Assessment that was conducted for all of Montrose County.

Table 43: Overcrowded Households, Montrose County, 2008

	Montrose County		City of Montrose		Naturita	
	Owner occupi ed	Renter occupi ed	Owner occupi ed	Renter occupi ed	Owner occupi ed	Renter occupi ed
1.0 occupants per room or less	11,051	4,174	3,865	2,374	223	76
1.01 occupants per room or more	112	203	23	89	6	0
Percent Overcrowded	1.0%	4.6%	0.6%	3.6%	2.6%	0.0%
	Nucla		Olathe		Non-Metro	
	Owner occupi ed	Renter occupi ed	Owner occupi ed	Renter occupi ed	Owner occupi ed	Renter occupi ed
1.0 occupants per room or less	249	106	376	208	6,338	1,410
1.01 occupants per room or more	2	15	13	31	67	68
Percent Overcrowded	0.9%	12.1%	3.3%	13.1%	1.1%	4.6%

There is also a significant number of disabled families in Montrose County.

9.0

	Montrose County		City of Montrose		Naturita	
	Renter HH	Owner HH	Renter HH	Owner HH	Renter HH	Owner HH
Disabled Household Member	936	2,232	511	752	21	91
Total Households	4,377	11,163	2,463	3,888	76	228
Percent Disabled	21.4%	20.0%	20.8%	19.3%	28.1%	40.0%
	Nucla		Olathe		Non-Municipal	
	Renter HH	Owner HH	Renter HH	Owner HH	Renter HH	Owner HH
Disabled Household Member	58	75	43	115	303	1,198
Total HH	120	252	240	389	1,104	5,607
Percent Disabled	47.8%	29.9%	17.9%	29.6%	20.5%	18.7%

The makeup of the Housing Population in Montrose County in 2009 is:

American Indian 2%
 Asian 1%
 Black 0%
 White 91%
 Hispanic 6%

There are also a number of renters and owners who are cost burdened:

Table 40: Cost Burdened Households, Montrose County, 2008 Montrose County						
Rent Burdened	% Rent Burdened	Total Renters	Cost Burdened	% Cost Burdened	Total Owners	
0 - 30% AMI	779	74.9%	1,040	1,007	66.5%	1,514
31 - 50% AMI	495	52.2%	948	395	32.1%	1,232
51 - 80% AMI	161	20.4%	789	605	33.1%	1,830
Above 80% AMI	44	12.6%	347	269	22.5%	1,196
Total Households	1,479	33.8%	4,377	2,276	20.4%	11,163
City of Montrose						
Rent Burdened	% Rent Burdened	Total Renters	Cost Burdened	% Cost Burdened	Total Owners	
0 - 30% AMI	535	74.9%	715	422	66.5%	635
31 - 50% AMI	336	52.2%	644	195	32.1%	608
51 - 80% AMI	81	20.4%	399	304	33.1%	919
Above 80% AMI	23	12.6%	183	132	22.5%	587
Total Households	976	39.6%	2,463	1,053	27.1%	3,888
Naturita						
Rent Burdened	% Rent Burdened	Total Renters	Cost Burdened	% Cost Burdened	Total Owners	
0 - 30% AMI	12	74.9%	16	29	66.5%	44
31 - 50% AMI	7	52.2%	14	10	32.1%	31
51 - 80% AMI	2	20.4%	8	9	33.1%	28
Above 80% AMI	0	12.6%	3	5	22.5%	22
Total Households	21	27.9%	76	53	23.2%	228
Nucla						
Rent Burdened	% Rent Burdened	Total Renters	Cost Burdened	% Cost Burdened	Total Owners	
0 - 30% AMI	35	74.9%	47	38	66.5%	58
31 - 50% AMI	17	52.2%	32	8	32.1%	26
51 - 80% AMI	5	20.4%	26	14	33.1%	41
Above 80% AMI	1	12.6%	11	6	22.5%	27
Total Households	59	48.7%	120	66	26.3%	252
Olathe						
Rent Burdened	% Rent Burdened	Total Renters	Cost Burdened	% Cost Burdened	Total Owners	
0 - 30% AMI	58	74.9%	78	66	66.5%	99
31 - 50% AMI	23	52.2%	44	33	32.1%	102
51 - 80% AMI	9	20.4%	43	36	33.1%	110
Above 80% AMI	2	12.6%	17	14	22.5%	63
Total Households	92	38.3%	240	149	38.3%	389
Non-Metro Areas						
Rent Burdened	% Rent Burdened	Total Renters	Cost Burdened	% Cost Burdened	Total Owners	
0 - 30% AMI	138	74.9%	185	451	66.5%	679
31 - 50% AMI	112	52.2%	215	149	32.1%	466
51 - 80% AMI	64	20.4%	312	242	33.1%	731
Above 80% AMI	17	12.6%	134	112	22.5%	496
Total Households	331	22.4%	1,478	954	14.9%	6,404

<p>9.1</p>	<p>Strategy for Addressing Housing 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. Note: Small, Section 8 only, and High Performing PHAs complete only for Annual Plan submission with the 5-Year Plan.</p> <ul style="list-style-type: none"> • Develop a wide range of housing choices for moderate and lower income families of various sizes, elderly households, and those with special challenges. • Preserve the affordability of existing stock of low-income housing by making rehab available in older neighborhoods • Support the efforts of other community groups like the VOA, Sharing Ministries, and MADA that help elderly and homeless • Apply for grants and loans as they become available for low-income housing development
<p>10.0</p>	<p>Additional Information. Describe the following, as well as any additional information HUD has requested.</p> <p>(a) Progress in Meeting Mission and Goals. Provide a brief statement of the PHA’s progress in meeting the mission and goals described in the 5-Year Plan.</p> <p>In the last 2 years, we added 91 units of low-income affordable multi-family housing to our stock. We also purchased a foreclosed HUD home and sold it under our new homeownership program. We also have worked steadily with Rural Development in order to more fully utilize our 72-bed dormitory in Olathe which has seen high vacancy rates in the past 3 years. We made special arrangements with RD to be able to house homeless individuals and other with zero income. We also signed an IGA with Delta Housing Authority so that we could expand our program offerings to include rehab and homeownership alternatives.</p> <p>(b) Significant Amendment and Substantial Deviation/Modification. Provide the PHA’s definition of “significant amendment” and “substantial deviation/modification”</p> <p>SIGNIFICANT AMENDMENT – Any Board action which departs from the primary mission of the Housing Authority</p> <p>SUBSTANTIAL DEVIATION / MODIFICATION – Any action that necessitates a change in a course of action or a major revision in the statement of goals and objective.</p> <p>(c) - None -</p>
<p>11.0</p>	<p>Required Submission for HUD Field Office Review. In addition to the PHA Plan template (HUD-50075), PHAs must submit the following documents. Items (a) through (g) may be submitted with signature by mail or electronically with scanned signatures, but electronic submission is encouraged. Items (h) through (i) must be attached electronically with the PHA Plan. Note: Faxed copies of these documents will not be accepted by the Field Office.</p> <p>(a) Form HUD-50077, <i>PHA Certifications of Compliance with the PHA Plans and Related Regulations</i> (which includes all certifications relating to Civil Rights)</p> <p>(b) Form HUD-50070, <i>Certification for a Drug-Free Workplace</i> (PHAs receiving CFP grants only)</p> <p>(c) Form HUD-50071, <i>Certification of Payments to Influence Federal Transactions</i> (PHAs receiving CFP grants only)</p> <p>(d) Form SF-LLL, <i>Disclosure of Lobbying Activities</i> (PHAs receiving CFP grants only)</p> <p>(e) Form SF-LLL-A, <i>Disclosure of Lobbying Activities Continuation Sheet</i> (PHAs receiving CFP grants only)</p> <p>(f) Resident Advisory Board (RAB) comments. Comments received from the RAB must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the recommendations and the decisions made on these recommendations.</p> <p>(g) Challenged Elements</p> <p>(h) Form HUD-50075.1, <i>Capital Fund Program Annual Statement/Performance and Evaluation Report</i> (PHAs receiving CFP grants only)</p> <p>(i) Form HUD-50075.2, <i>Capital Fund Program Five-Year Action Plan</i> (PHAs receiving CFP grants only)</p>



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Montrose County Housing Authority

RESIDENT ADVISORY BOARD COMMENTS SUMMARIZED

The Montrose County Housing Authority Resident Advisory Board is made up of selected individuals who are enrolled in the Family Self-Sufficiency Program and holders of the Housing Choice Voucher. Each year, members are polled in order to evaluate the benefits of the program and gather needed input for long-term planning and strategic planning. Comments from the group are summarized below.

Members include:

Jennifer Franciose	714 South Forty	Montrose, CO 81401
Tami Hemmah	P.O. Box 244	Olathe, CO 81425
Roseanne Bosgal	10676 6200 Rd	Montrose, CO 81401
Laura Guidroz	2372 Robins Way A	Montrose, CO 81401

Comments:

There were no comments returned from any of the 4 members of the resident advisory board this year so we presume that they are satisfied with the programs the way they are currently being administered.



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Montrose County Housing Authority

September 11, 2009

Tami Hemmah
P.O. Box 244
Olathe, CO 81425

Dear Tami,

As a Section 8 Voucher holder and a present (or past) participant in the Family Self-Sufficiency Program, it is important that we secure your input about these programs. HUD requires that we poll various plan participants and seek their input about the value of these programs, what things you like or don't like, what things have worked or not worked, etc.)

Your comments do not have to be long or complicated and they will be forwarded anonymously to HUD along with our required 5-year plan that the Housing Authority is required to submit within the next 2 weeks. Your input helps not only to identify potential problems in existing programs, but they also help shape constructive changes or modifications that can be made to improve the programs we already have.

Please take 5 minutes and write down any input you may have on the enclosed questionnaire (freehand, pencil, pen or electronic). In order to simplify this process for you, we have included a self-addressed stamped envelop for you to return the document. This is a blind survey so your name is not required on the form. Thank you in advance for your prompt response.

Sincerely yours,

Tim Heavers, Executive Director
Montrose County Housing Authority

Attachment

SECTION 8 HOUSING CHOICE VOUCHER
PARTICIPANT SURVEY

How long have you been on the Program? _____

Are you currently enrolled in the Family Self-Sufficiency Program? Yes ___ No ___

If no, were you at least made aware of the program when you enrolled?
Yes _____ No _____

Please include below any comments about either the Section 8 Voucher Program or the Family Self-Sufficiency Program.

Do you have any suggestions for improvements?

Is owning a home one of your future goals? Yes _____ No _____

If yes, does that goal seem to be more reachable today than it was five years ago, or less? More _____ Less _____

How would you describe your relationship with the Housing Authority that issued your voucher?

**Please return this form in the enclosed self-addressed stamped envelope.
Thank you.**
