

| <b>PHA 5-Year and Annual Plan</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <b>U.S. Department of Housing and Urban Development<br/>Office of Public and Indian Housing</b> |                                      | <b>OMB No. 2577-0226<br/>Expires 4/30/2011</b> |                              |
|-----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|--------------------------------------|------------------------------------------------|------------------------------|
| <b>1.0</b>                        | <b>PHA Information</b><br>PHA Name: <u>Whitefish Housing Authority</u> PHA Code: <u>MT015</u><br>PHA Type: <input checked="" type="checkbox"/> Small <input type="checkbox"/> High Performing <input checked="" type="checkbox"/> Standard <input checked="" type="checkbox"/> HCV (Section 8)<br>PHA Fiscal Year Beginning: (MM/YYYY): <u>07/2010</u>                                                                                                                                                                            |                                                                                                 |                                      |                                                |                              |
| <b>2.0</b>                        | <b>Inventory</b> (based on ACC units at time of FY beginning in 1.0 above)<br>Number of PH units: <u>50</u> Number of HCV units: <u>16</u>                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                 |                                      |                                                |                              |
| <b>3.0</b>                        | <b>Submission Type</b><br><input checked="" type="checkbox"/> 5-Year and Annual Plan <input type="checkbox"/> Annual Plan Only <input type="checkbox"/> 5-Year Plan Only                                                                                                                                                                                                                                                                                                                                                          |                                                                                                 |                                      |                                                |                              |
| <b>4.0</b>                        | <b>PHA Consortia</b> <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:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                 |                                      |                                                |                              |
| <b>5.0</b>                        | <b>5-Year Plan.</b> Complete items 5.1 and 5.2 only at 5-Year Plan update.                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                 |                                      |                                                |                              |
| <b>5.1</b>                        | <b>Mission.</b> 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:<br>The mission of the Whitefish Housing Authority is to serve the needs of low income, very low income and extremely low income households in our jurisdiction. The mission of the Whitefish Housing Authority is to promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination. |                                                                                                 |                                      |                                                |                              |

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.

Please see the attached report for the update on the progress made in the 2025-2010 Five Year Plan.

The Goals and Objectives of the Whitefish Housing Authority for the next five years 2010-2015 include:

1. PHA Goal: Increase the number of affordable rental units and/or rents for the very low to low income households.
  - A. Apply for additional Housing Choice Vouchers, including vouchers specifically for the disabled.
  - B. Create new rental units on WHA land and/or the adjacent Golden Agers Senior Center.
  - C. Partner with private or public for the creation of new affordable rental units such as tax credits, HUD 202 and 811 and other means.
  - D. Partner with the new Whitefish Area Land Trust as the owner of the land under affordable rentals when the partnership increases the period of affordability.
  - E. Acquire or build rental units for management by WHA
  - F. Increase the capacity of WHA to manage more units.
  - G. Increase/Create rentals that include on site management and/or more services than WHA provides in independent living.
  - H. Increase rental opportunities for the elderly and disabled.
  - I. Create a Tenant Based Rental Assistance Program
2. PHA Goal: Maintain the Mountain View Manor
  - A. Update or replace the heating and water systems at the Mountain View Manor energy conservation and green sustainable practices.
  - B. Conduct a Physical Needs Assessment of the Mountain View Manor and develop a comprehensive plan for its maintenance.
  - C. Create more two bedroom units at the Mountain View Manor.
  - D. Maintain the landscaping, parking lots, tenant gardens, and lighting of the Mountain View Manor.
  - E. Sell the small triangle piece of land to the north along the river as we know it cannot be developed and the neighbor would like to purchase.
  - F. Remodel apartments as able to include updated more accessible spaces.
  - G. Replace appliances as able for energy conservation and accessibility.
  - H. Increase tenant participation in the tenant gardens.
  - I. Update or replace the lighting in common areas for energy conservation, ambiance and compliance with the "Dark Skies" City of Whitefish ordinance.
  - J. Maintain a full time maintenance staff at the Mountain View Manor.
  - K. Replace carpets and flooring as needed during apartment turnover in a manner that will decrease the overall costs in this area, i.e. with flooring that has longer life and needs less replacement, etc.
  - L. Improve the lighting in apartments for energy conservation and better lighting.
  - M. Seek a reduction or elimination of the payment in lieu of taxes with the City of Whitefish to enable the WHA to use the resources for the upkeep of public housing and provide adequate funds for operations.
  - N. Seek to increase energy conservation at the Mountain View Manor.
  - O. Improve the community area kitchen facilities.
3. Increase Homeownership Opportunities for low and moderate income Households.
  - A. Continue to manage and grow the capacity of the Whitefish Area Land Trust to increase its ability to create opportunities in the area of homeownership.
  - B. Seek federal, state and private funding for homeownership opportunities.
  - C. Conduct outreach to increase awareness in the community of the importance of maintaining homeownership opportunities for low income wage earners in Whitefish.
  - D. Gain funding from the City of Whitefish for the WALT Homeownership Program operating costs.
  - E. Aid ten households a year purchase homes in the Whitefish area.
  - F. Work with private developers for the inclusion of housing in their developments that is affordable to low and moderate income households.
  - G. Promote/Create "granny flat" cluster developments for ownership/rent by elderly and disabled population.
  - H. Increase "Accessibility" to homes.
  - I. Work to gain mandatory Inclusionary Zoning Ordinance
4. Improve the condition of the existing "housing stock".
  - A. Grow and/or create a new reserve account for repairs of owner occupied homes. (There is a City of Whitefish Program with a revolving loan fund and WHA is applying for a \$30,000 Housing Preservation Grant. Should there be a homeowner fee for repairs in the WALT program?)
  - B. Seek to maintain the homes in our existing housing stock for good structural integrity, health and safety issues and conservation of energy.
  - C. Understand the role of the WHA in offering financing for energy upgrade packages for solar, wind, etc. and implement a program if feasible.
  - D. Fund a program to aid for profit landlords maintain rental stock.
  - E. Increase "Accessibility" to homes.
5. Work to build the reserves of the Whitefish Housing Authority
6. Understand the options offered by HUD in the new TRA initiative and implement a plan that ensures the best stability for WHA's continued operations and therefore its stated mission.
7. The "greening" of public housing through our choice of cleaning products, building materials, paints, etc.
8. Maintain adequate office space.

|     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 6.0 | <p><b>PHA Plan Update</b></p> <p>(a) Identify all PHA Plan elements that have been revised by the PHA since its last Annual Plan submission:</p> <p>The WHA made a revision to the list of projects to be completed with ARRA Capital Funds (approved by a board resolution and the local HUD Denver office).</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 Plan for the Whitefish Housing Authority are available to the public and can be obtained at the offices of the Mountain View Manor at 100 East Fourth Street and at the Whitefish Housing Offices at 142 Railway Street, Whitefish, MT. By request the plan will be mailed or emailed.</p>                                                |
| 7.0 | <p><b>Hope VI, Mixed Finance Modernization or Development, Demolition and/or Disposition, Conversion of Public Housing, Homeownership Programs, and Project-based Vouchers.</b> <i>Include statements related to these programs as applicable.</i></p> <p>The Whitefish Housing Authority will investigate the Conversion of Public Housing in the 2010-2015 period and may, depending on the outcome of the feasibility study submit an application for such to HUD.</p> <p>In addition, the WHA hopes to sell a portion of land that is not suitable for development and plans to submit a Demolition and/or Disposition Application.</p> <p>The Whitefish Housing Authority has a signed Memorandum of Agreement for the management of the Whitefish Area Land Trust and its Homeownership Program.</p> <p>The Whitefish Housing Authority manages 16 Housing Choice Vouchers since 2004.</p> |
| 8.0 | <p><b>Capital Improvements.</b> Please complete Parts 8.1 through 8.3, as applicable.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 8.1 | <p><b>Capital Fund Program Annual Statement/Performance and Evaluation Report.</b> 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> <p>WHA open CFP Grants:<br/>ARRA 50075.1 for ARRA Capital Funds 2010 is attached</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 8.2 | <p><b>Capital Fund Program Five-Year Action Plan.</b> 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><b>Capital Fund Financing Program (CFFP).</b></p> <p><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.

The housing needs are listed according to their inclusion in three sources:

- MT Consolidated Plan
- Whitefish Growth Policy
- The 2008 Whitefish Housing Needs Assessment (Attached)

### **The Montana Consolidated Housing Plan**

MT Housing Needs Assessment 2009

Executive Summary

#### **“FORECAST OF HOUSING DEMAND AND UNMET HOUSING NEED**

Total household formation is expected to rise in the coming years in Montana, reaching a projected 491,060 households in 2030. However, lower-income households, or households with incomes of 80 percent or less of Median Family Income (MFI), are projected to increase from 152,345 to 206,730 over the 2000 and 2030 forecast horizon.

By 2030, 145,857 households are expected to have an unmet housing need, of which 29,539 will be elderly households.

At the end of the current Consolidated Plan period, March 31, 2015, households are projected to increase to 417,970, of which 288,032 will be homeowner households and 129,938 will be renter households. The number of low-income households is projected to increase to 176,470, with 93,758, or 53.1 percent of low-income households, suffering an unmet housing need. Of the 123,136 households with an unmet housing need, or 30 percent of all Montana households, an estimated 25,305 are projected to be elderly households and 50,067 are projected to be renter households.

The increase of lower-income households, or households with incomes less than 80 percent of MFI, will rise to 93,758 households by 2015 and will continue to exert substantial pressure on available housing resources and the need for affordable rental and homeowner units.

#### **HOUSEHOLDS BY INCOME**

Excerpt from page 7

“Housing concerns falling under the Consolidated Plan pertain to housing for lower income households, particularly those with income below 80.0 percent of MFI. Consequently, by 2015, the final year of the upcoming Five-Year Consolidated Plan, there will be an estimated 45,613 households with incomes at 30.0 percent or less MFI, 51,590 households with incomes between 30.0 and 50.0 percent MFI, and 79,267 households with incomes between 50.0 and 80.0 percent MFI. By 2015, lower-income households will comprise 42.2 percent of all projected households in the state of Montana”.

### **City of Whitefish Growth Policy**

ISSUE: Affordable homes in Whitefish that are being lost through redevelopment are not being replaced.  
ISSUE: Affordable housing should be located in suitable areas throughout the community.

9.0

|      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 9.1  | <p><b>Strategy for Addressing Housing Needs.</b> 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. <b>Note: Small, Section 8 only, and High Performing PHAs complete only for Annual Plan submission with the 5-Year Plan.</b></p> <p>The WHA adopted the 2009 Housing Plan in which it describes its strategy for addressing the housing needs in Whitefish and it is attached to this Five Year Plan if needed.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 10.0 | <p><b>Additional Information.</b> Describe the following, as well as any additional information HUD has requested.</p> <p>(a) <b>Progress in Meeting Mission and Goals.</b> Provide a brief statement of the PHA’s progress in meeting the mission and goals described in the 5-Year Plan.</p> <p>The Whitefish Housing Authority has made progress on the majority of the goals stated in the 2005-2010 Five Year PHA Plan. In the area of homeownership, the WHA set a goal of aiding ten households a year in the Housing Plan of 2004. The housing authority has aided a total of 21 households since 2005 or approximately five households a year. The housing authority did not hit its targeted number of assisted households but has created a Homeownership Program and founded a community land trust, the Whitefish Area Land Trust. The market could not have been tougher in a small high cost resort town. First the market was too fast and too expensive and so WHA created a nonprofit that has now constructed seven of the 21 homes sold in the Program. Progress in this area includes the creation of the Homeownership Program, the Whitefish Area Land Trust, the sale of 21 homes, and the adoption of a mechanism (the community land trust model) to keep the homes acquired permanently affordable. The WHA has won approximately \$1.6 million dollars for this program to date. The two year budget for the Homeownership Program fo4 2010 and 2011 is approximately \$2 million dollars and will aid 10 households purchase a home under the community land trust model.</p> <p>WHA has maintained the Mountain View Manor and shows progress in almost all goals set in the previous Five Year Plan. Planned and completed renovations/updates include the replacement of all apartment windows, new furniture in the common hallway atrium areas, new faucets in over 74% of the apartments, and good maintenance of the heating system. All entrances are ADA accessible and sidewalks have been updated to remove all steps. The Mountain View Manor is now a non smoking building.</p> <p>In the area of creating more rentals, WHA has supported tax credit projects but has not obtained more new units or vouchers for the very low and low income households. WHA supported two applications by Accessible Space for a 23 unit elderly HUD 202 but was not successful due to land costs. WHA recently submitted a 2010 CDBG Planning Grant application to aid us in our efforts in the area of creating more rental opportunities for very low and low income households including the elderly, disabled and other special needs populations.</p> <p>Please see the attached “Five Year Plan Report on Past Goals” for a full report on the goals set and the progress.</p> <p>(b) <b>Significant Amendment and Substantial Deviation/Modification.</b> Provide the PHA’s definition of “significant amendment” and “substantial deviation/modification”</p> <p>WHA definition: A substantial deviation shall be defined as a use of funds for a project or need which is not listed in the five year plan or any annual plan and which will cost more than 70% of the most current CFP grant contract amount.</p> <p>A significant amendment or modification to the Annual Plan shall be defined as the use of funds for a project or need which is not listed in the Five Year Plan, the current Annual Plan or any previous year’s Annual Plan which has not been completed and which will require the spending of more than 70% of the current year CFP grant.</p> |

|             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>11.0</b> | <p><b>Required Submission for HUD Field Office Review.</b> 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. <b>Note:</b> Faxed copies of these documents will not be accepted by the Field Office.</p> <ul style="list-style-type: none"> <li>(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)</li> <li>(b) Form HUD-50070, <i>Certification for a Drug-Free Workplace</i> (PHAs receiving CFP grants only)</li> <li>(c) Form HUD-50071, <i>Certification of Payments to Influence Federal Transactions</i> (PHAs receiving CFP grants only)</li> <li>(d) Form SF-LLL, <i>Disclosure of Lobbying Activities</i> (PHAs receiving CFP grants only)</li> <li>(e) Form SF-LLL-A, <i>Disclosure of Lobbying Activities Continuation Sheet</i> (PHAs receiving CFP grants only)</li> <li>(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.</li> <li>(g) Challenged Elements</li> <li>(h) Form HUD-50075.1, <i>Capital Fund Program Annual Statement/Performance and Evaluation Report</i> (PHAs receiving CFP grants only)</li> <li>(i) Form HUD-50075.2, <i>Capital Fund Program Five-Year Action Plan</i> (PHAs receiving CFP grants only)</li> </ul> |
|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937, as amended, which introduced 5-Year and Annual PHA Plans. The 5-Year and Annual PHA plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission and strategies for serving the needs of low-income and very low-income families. This form is to be used by all PHA types for submission of the 5-Year and Annual Plans to HUD. Public reporting burden for this information collection is estimated to average 12.68 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

**Privacy Act Notice.** The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality

## Instructions form HUD-50075

**Applicability.** This form is to be used by all Public Housing Agencies (PHAs) with Fiscal Year beginning April 1, 2008 for the submission of their 5-Year and Annual Plan in accordance with 24 CFR Part 903. The previous version may be used only through April 30, 2008.

### **1.0 PHA Information**

Include the full PHA name, PHA code, PHA type, and PHA Fiscal Year Beginning (MM/YYYY).

### **2.0 Inventory**

Under each program, enter the number of Annual Contributions Contract (ACC) Public Housing (PH) and Section 8 units (HCV).

### **3.0 Submission Type**

Indicate whether this submission is for an Annual and Five Year Plan, Annual Plan only, or 5-Year Plan only.

### **4.0 PHA Consortia**

Check box if submitting a Joint PHA Plan and complete the table.

### **5.0 Five-Year Plan**

Identify the PHA's Mission, Goals and/or Objectives (24 CFR 903.6). Complete only at 5-Year update.

**5.1 Mission.** A statement of the mission of the public housing agency for serving the needs of low-income, very low-income, and extremely low-income families in the jurisdiction of the PHA during the years covered under the plan.

**5.2 Goals and Objectives.** Identify quantifiable goals and objectives that will enable the PHA to serve the needs of low income, very low-income, and extremely low-income families.

**6.0 PHA Plan Update.** In addition to the items captured in the Plan template, PHAs must have the elements listed below readily available to the public. Additionally, a PHA must:

- (a) Identify specifically which plan elements have been revised since the PHA's prior plan submission.
- (b) Identify where the 5-Year and Annual Plan may be obtained by the public. At a minimum, PHAs must post PHA Plans, including updates, at each Asset Management Project (AMP) and main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on its official website. PHAs are also encouraged to provide each resident council a copy of its 5-Year and Annual Plan.

### **PHA Plan Elements.** (24 CFR 903.7)

1. **Eligibility, Selection and Admissions Policies, including Deconcentration and Wait List Procedures.** Describe the PHA's policies that govern resident or tenant eligibility, selection and admission including admission preferences for both public housing and HCV and unit assignment policies for public housing; and procedures for maintaining waiting lists for admission to public housing and address any site-based waiting lists.
2. **Financial Resources.** A statement of financial resources, including a listing by general categories, of the PHA's anticipated resources, such as PHA Operating, Capital and other anticipated Federal resources available to the PHA, as well as tenant rents and other income available to support

public housing or tenant-based assistance. The statement also should include the non-Federal sources of funds supporting each Federal program, and state the planned use for the resources.

3. **Rent Determination.** A statement of the policies of the PHA governing rents charged for public housing and HCV dwelling units.
4. **Operation and Management.** A statement of the rules, standards, and policies of the PHA governing maintenance management of housing owned, assisted, or operated by the public housing agency (which shall include measures necessary for the prevention or eradication of pest infestation, including cockroaches), and management of the PHA and programs of the PHA.
5. **Grievance Procedures.** A description of the grievance and informal hearing and review procedures that the PHA makes available to its residents and applicants.
6. **Designated Housing for Elderly and Disabled Families.** With respect to public housing projects owned, assisted, or operated by the PHA, describe any projects (or portions thereof), in the upcoming fiscal year, that the PHA has designated or will apply for designation for occupancy by elderly and disabled families. The description shall include the following information: 1) development name and number; 2) designation type; 3) application status; 4) date the designation was approved, submitted, or planned for submission, and; 5) the number of units affected.
7. **Community Service and Self-Sufficiency.** A description of: (1) Any programs relating to services and amenities provided or offered to assisted families; (2) Any policies or programs of the PHA for the enhancement of the economic and social self-sufficiency of assisted families, including programs under Section 3 and FSS; (3) How the PHA will comply with the requirements of community service and treatment of income changes resulting from welfare program requirements. (**Note: applies to only public housing.**)
8. **Safety and Crime Prevention.** For public housing only, describe the PHA's plan for safety and crime prevention to ensure the safety of the public housing residents. The statement must include: (i) A description of the need for measures to ensure the safety of public housing residents; (ii) A description of any crime prevention activities conducted or to be conducted by the PHA; and (iii) A description of the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities.
9. **Pets.** A statement describing the PHAs policies and requirements pertaining to the ownership of pets in public housing.
10. **Civil Rights Certification.** A PHA will be considered in compliance with the Civil Rights and AFFH Certification if: it can document that it examines its programs and proposed programs to identify any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with the local jurisdiction to implement any of the

jurisdiction's initiatives to affirmatively further fair housing; and assures that the annual plan is consistent with any applicable Consolidated Plan for its jurisdiction.

11. **Fiscal Year Audit.** The results of the most recent fiscal year audit for the PHA.
12. **Asset Management.** A statement of how the agency will carry out its asset management functions with respect to the public housing inventory of the agency, including how the agency will plan for the long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs for such inventory.
13. **Violence Against Women Act (VAWA).** A description of:  
1) Any activities, services, or programs provided or offered by an agency, either directly or in partnership with other service providers, to child or adult victims of domestic violence, dating violence, sexual assault, or stalking; 2) Any activities, services, or programs provided or offered by a PHA that helps child and adult victims of domestic violence, dating violence, sexual assault, or stalking, to obtain or maintain housing; and 3) Any activities, services, or programs provided or offered by a public housing agency to prevent domestic violence, dating violence, sexual assault, and stalking, or to enhance victim safety in assisted families.

#### 7.0 Hope VI, Mixed Finance Modernization or Development, Demolition and/or Disposition, Conversion of Public Housing, Homeownership Programs, and Project-based Vouchers

- (a) **Hope VI or Mixed Finance Modernization or Development.** 1) A description of any housing (including project number (if known) and unit count) for which the PHA will apply for HOPE VI or Mixed Finance Modernization or Development; and 2) A timetable for the submission of applications or proposals. The application and approval process for Hope VI, Mixed Finance Modernization or Development, is a separate process. See guidance on HUD's website at: <http://www.hud.gov/offices/pih/programs/ph/hope6/index.cfm>
- (b) **Demolition and/or Disposition.** With respect to public housing projects owned by the PHA and subject to ACCs under the Act: (1) A description of any housing (including project number and unit numbers [or addresses]), and the number of affected units along with their sizes and accessibility features) for which the PHA will apply or is currently pending for demolition or disposition; and (2) A timetable for the demolition or disposition. The application and approval process for demolition and/or disposition is a separate process. See guidance on HUD's website at: [http://www.hud.gov/offices/pih/centers/sac/demo\\_dispo/index.cfm](http://www.hud.gov/offices/pih/centers/sac/demo_dispo/index.cfm)  
**Note:** This statement must be submitted to the extent that approved and/or pending demolition and/or disposition has changed.
- (c) **Conversion of Public Housing.** With respect to public housing owned by a PHA: 1) A description of any building or buildings (including project number and unit count) that the PHA is required to convert to tenant-based assistance or that the public housing agency plans to voluntarily convert; 2) An analysis of the projects or buildings required to be converted; and 3) A statement of the amount of assistance received under this chapter to be used for rental assistance or other housing assistance in connection with such conversion. See guidance on HUD's website at: <http://www.hud.gov/offices/pih/centers/sac/conversion.cfm>
- (d) **Homeownership.** A description of any homeownership (including project number and unit count) administered by the agency or for which the PHA has applied or will apply for approval.
- (e) **Project-based Vouchers.** If the PHA wishes to use the project-based voucher program, a statement of the projected number of project-based units and general locations and how project basing would be consistent with its PHA Plan.

**8.0 Capital Improvements.** This section provides information on a PHA's Capital Fund Program. With respect to public housing projects owned, assisted, or operated by the public housing agency, a plan describing the capital improvements necessary to ensure long-term physical and social viability of the projects must be completed along with the required forms.

Items identified in 8.1 through 8.3, must be signed where directed and transmitted electronically along with the PHA's Annual Plan submission.

**8.1 Capital Fund Program Annual Statement/Performance and Evaluation Report.** PHAs must complete the *Capital Fund Program Annual Statement/Performance and Evaluation Report* (form HUD-50075.1), for each Capital Fund Program (CFP) to be undertaken with the current year's CFP funds or with CFFP proceeds. Additionally, the form shall be used for the following purposes:

- (a) To submit the initial budget for a new grant or CFFP;
- (b) To report on the Performance and Evaluation Report progress on any open grants previously funded or CFFP; and
- (c) To record a budget revision on a previously approved open grant or CFFP, e.g., additions or deletions of work items, modification of budgeted amounts that have been undertaken since the submission of the last Annual Plan. The Capital Fund Program Annual Statement/Performance and Evaluation Report must be submitted annually.

Additionally, PHAs shall complete the Performance and Evaluation Report section (see footnote 2) of the *Capital Fund Program Annual Statement/Performance and Evaluation* (form HUD-50075.1), at the following times:

1. At the end of the program year; until the program is completed or all funds are expended;
2. When revisions to the Annual Statement are made, which do not require prior HUD approval, (e.g., expenditures for emergency work, revisions resulting from the PHAs application of fungibility); and
3. Upon completion or termination of the activities funded in a specific capital fund program year.

#### 8.2 Capital Fund Program Five-Year Action Plan

PHAs must submit the *Capital Fund Program Five-Year Action Plan* (form HUD-50075.2) for the entire PHA portfolio for the first year of participation in the CFP and annual update thereafter to eliminate the previous year and to add a new fifth year (rolling basis) so that the form always covers the present five-year period beginning with the current year.

**8.3 Capital Fund Financing Program (CFFP).** Separate, written HUD approval is required if the PHA proposes to pledge any portion of its CFP/RHF funds to repay debt incurred to finance capital improvements. The PHA must identify in its Annual and 5-year capital plans the amount of the annual payments required to service the debt. The PHA must also submit an annual statement detailing the use of the CFFP proceeds. See guidance on HUD's website at: <http://www.hud.gov/offices/pih/programs/ph/capfund/cffp.cfm>

**9.0 Housing Needs.** Provide a statement of the housing needs of families residing in the jurisdiction served by the PHA and the means by which the PHA intends, to the maximum extent practicable, to address those needs. (**Note:** Standard and Troubled PHAs complete annually; Small and High Performers complete only for Annual Plan submitted with the 5-Year Plan).

**9.1 Strategy for Addressing Housing Needs.** Provide a 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:** Standard and Troubled PHAs complete annually; Small and High Performers complete only for Annual Plan submitted with the 5-Year Plan).

**10.0 Additional Information.** Describe the following, as well as any additional information requested by HUD:

- (a) **Progress in Meeting Mission and Goals.** PHAs must include (i) a statement of the PHAs progress in meeting the mission and goals described in the 5-Year Plan; (ii) the basic criteria the PHA will use for determining a significant amendment from its 5-year Plan; and a significant amendment or modification to its 5-Year Plan and Annual Plan. (**Note: Standard and Troubled PHAs complete annually; Small and High Performers complete only for Annual Plan submitted with the 5-Year Plan.**)

- (b) **Significant Amendment and Substantial Deviation/Modification.** PHA must provide the definition of “significant amendment” and “substantial deviation/modification”. **(Note: Standard and Troubled PHAs complete annually; Small and High Performers complete only for Annual Plan submitted with the 5-Year Plan.)**
- (c) PHAs must include or reference any applicable memorandum of agreement with HUD or any plan to improve performance. **(Note: Standard and Troubled PHAs complete annually).**

**11.0 Required Submission for HUD Field Office Review.** In order to be a complete package, PHAs must submit items (a) through (g), with signature by mail or electronically with scanned signatures. Items (h) and (i) shall be submitted electronically as an attachment to the PHA Plan.

- (a) Form HUD-50077, *PHA Certifications of Compliance with the PHA Plans and Related Regulations*
- (b) Form HUD-50070, *Certification for a Drug-Free Workplace (PHAs receiving CFP grants only)*

- (c) Form HUD-50071, *Certification of Payments to Influence Federal Transactions (PHAs receiving CFP grants only)*
- (d) Form SF-LLL, *Disclosure of Lobbying Activities (PHAs receiving CFP grants only)*
- (e) Form SF-LLL-A, *Disclosure of Lobbying Activities Continuation Sheet (PHAs receiving CFP grants only)*
- (f) Resident Advisory Board (RAB) comments.
- (g) Challenged Elements. Include any element(s) of the PHA Plan that is challenged.
- (h) Form HUD-50075.1, *Capital Fund Program Annual Statement/Performance and Evaluation Report (Must be attached electronically for PHAs receiving CFP grants only)*. See instructions in 8.1.
- (i) Form HUD-50075.2, *Capital Fund Program Five-Year Action Plan (Must be attached electronically for PHAs receiving CFP grants only)*. See instructions in 8.2.

# Whitefish Housing Authority

## Report on Progress of Goals set in Five Year Plan 2005-2010

---

May 11, 2010

This report follows the layout of the Five Year Plan 2005-2010.

### 5.2

#### **Report on the progress the PHA has made in meeting the goals and objectives described in the previous 5-Year Plan.**

The following is a list of the goals as submitted in the Whitefish Housing Authority 2005-2010 Five Year Plan and a brief description of progress in meeting the stated goals.

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

##### **1. PHA Goal: Expand the supply of assisted housing**

Objectives:

- a. Apply for additional rental vouchers: Expand from 16 tenant based vouchers to 30 by 2010.

The Whitefish Housing Authority continues to manage 16 vouchers in 2010 and will continue to keep this goal in our 2010 PHA Plan.

- b. Reduce public housing vacancies: Maintain 98% occupancy.

The Mountain View Manor has maintained 100% lease up for the last three years. The time between lease up is less than 30 days on average. The occupancy rate is 98% or better and the lack of a 100% occupancy score is due to down time between leases due to maintenance and/or move in dates of new tenants.

- c. Leverage private or other public funds to create additional housing opportunities: Create 14-20 additional rentals for low to moderate income in Whitefish.
- d. Acquire or build units or developments: Build more units on WHA owned property, and develop rental housing units, rental office space and increase services to seniors and disabled in partnership with our neighbor, Golden Agers Senior Center.

The Whitefish Housing Authority has not been able to expand the number of affordable rentals to date. We have however tried. Accessible Space Inc approached the WHA for the construction of 23 units of HUD 202 apartments for the elderly. The cost of land in Whitefish was prohibitive and WHA attempted to locate the units on public housing

authority land. HUD however felt the density of the site was too much. ASI then tried in a second year and located a lot. However the environmental review found Meth in the soil and the application was rejected. ASI is building in Kalispell, Montana due to this set back.

In addition, the WHA began the preliminary work of hiring an architect and working with the local Senior Center for the possible creation of rental units at this site in 2006. No further progress has been made on this development due to lack of staff and other resources.

The Whitefish Housing Authority submitted a 2010 CDBG Planning Grant in order to gauge the feasibility of nine projects to increase affordable rentals including the two listed above.

The creation of more affordable rental units remains a goal in 2010 – 2015.

**e. Other (list below):**

- Aid 8-10 households gain homeownership each year

The Whitefish Housing Authority created the Homeownership Program in 2005 and to date has aided 21 low income households purchase a home in Whitefish.

To do so the Whitefish Housing Authority founded a 501c3 nonprofit for development and later helped that nonprofit morph into the Whitefish Area Land Trust. Beginning in 2010, all homes sold through the Homeownership Program will be sold through the Whitefish Area Land Trust utilizing a ground lease to hold the home affordable permanently. Due to funding constraints, the 2010-2011 goal is to aid 10 households purchase a home in Whitefish.

- Increase staff to accommodate for growth in WHA activities

While WHA was able to increase staff in 2005 to accommodate for our growth and management of the Homeownership and HCV Programs, WHA reduced staff in 2008 from a total of seven to the four full-time and one temporary part time staff we have today.

While the staff today is sufficient is sufficient to manage the operations today, it is not sustainable.

- The HCV Program is underfunded for operations and WHA receives \$750 monthly in Administrative Funds.
- The Homeownership Program is not funded sufficiently through the grants it seeks alone and has not received city funds since 2003. In order to maintain the program, the WHA must seek funding from the City of Whitefish and/or seek partnerships for the management of some activities.
- Public housing is experiencing an approximate 65% decrease in operating subsidy in 2010. The decrease is due to the implementation of the

decisions of 2005 and the increase in WHA collected rent. WHA increased rental income from fye 6/30/2008 to fye 6/30/2009 by approximately \$23,000. As public housing, the rent is based on income of the actual tenants. The increase in rent corresponds to the attraction of higher income households living at the Mountain View Manor. The developing trend in 2010 however is the need of the very low and no income populations. When our rent decreases due to this increase in the number of poor seeking public housing, the WHA is very concerned that the subsidy will be insufficient and will greatly decrease therefore our ability to maintain staff. This is serious concern not only noting possible staff reduction but also noting that more staff is needed when we begin to house a larger indigent and disabled population.

WHA will seek to increase funding for operations.

- Improve WHA computer systems

In 2000 the WHA was not yet computerized. All accounting and rent calculations were done by hand using the double entry accounting system. The WHA is now fully computerized. All administrative staff have current computer operating systems, utilized Tenmast for the calculation and submission of rent to HUD, and QuickBooks is used as the accounting system. Recent purchases for computers in 2010 and a new copier in 2009 should suffice for the next two to three years without costs for replacement or upgrade.

- Develop a long term renovation/maintenance plan for the Mountain View Manor

This task remains incomplete. While staff maintains the systems and is aware of maintenance needs, a comprehensive Physical Needs Assessment has not been completed. The WHA did work with Johnson Controls for a possible project utilizing the Capital Funds but opted not to borrow outside funds when facing such an unstable future of HUD funding. As a small PHA, WHA has opted to maintain the building as we are able with the available funding.

In 2010, WHA has plans to conduct a full Physical Needs Assessment and following this assessment will develop an updated comprehensive plan for the maintenance of the Mountain View Manor which was built in 1970 and has 50 apartments for the elderly and disabled.

- Develop new WHA offices either on WHA land, Golden Agers Center, or other location. The goal is to create work environment separate from the apartment management of Mountain View Manor.

WHA moved its main office out of public housing in 2005. The move has been positive and has allowed for the growth in the number of persons served by allowing staff to concentrate on development activities verses the day to day management of public housing. Two full time staff remain at public housing and are 100% dedicated to the

project. Two other staff are located in a separate office space off campus and manage the HCV Program, the Housing Rehabilitation Program (City of Whitefish) and the Homeownership Program.

## **2. PHA Goal: Improve the quality of assisted housing**

Objectives:

- a. Improve public housing management: (PHAS score): PHA score of 98 or better.

In 2005 WHA was designated as troubled due to a non passing FASS score. The poor FASS score was principally caused by the housing authority's expenses with the nonprofit as a component unit. As a small housing authority, WHA does not have the reserves to balance a large liability such as the purchase of land for development with the nonprofit. To remove the troubled status, WHA entered into a Memorandum of Understanding with HUD, hired a new auditor more familiar with housing authorities, contracted for services to review the bookkeeping of our four housing programs, worked more closely with the fee accountant and attended HUD training.

The troubled status was removed in late 2008 and WHA is now designated as a "Standard Performer." WHA will continue to regain its "High Performer". The HUD evaluation systems have been in state of change for years and this has also been difficult as a small PHA with limited staff.

- b. Improve voucher management: (SEMAP score) : Maintain a high performer score

WHA has maintained a high performer score in the HCV Program.

- c. Increase customer satisfaction:

- Update or replace the emergency response and intercom system

After investigation of our ability to update the emergency response system between apartments and the main alarm, the WHA opted that new technology and services offered by programs such as "Medi-Alert" surpass anything our upgrade could provide. WHA has opted not to replace or enhance the system and instead advocates tenants sign up with such an outside emergency alert system.

The Whitefish Housing Authority improved the accessibility of our main entry in 2010 using ARRA stimulus funds. The automatic door motors were updated and replaced in the two entry doors and new more accessible handicapped devices (push buttons) were added for the automatic opening.

- d. Concentrate on efforts to improve specific management functions:

(List; e.g., public housing finance; voucher unit inspections):

- Improve public housing finance through new software system and training
- Improve management capability through the use of business plans
- Increase staff plan to create positions which are specific to tasks and less

jack of all trades.

WHA has improved its accounting practices through the use of QuickBooks, a contracted visit for review and consultation on our accounting practices, the MOU with HUD and review of our internal controls policy, and involvement of the Board for better understanding of the budget process and accounting of program income and expenses.

WHA has made progress in delegation of duties to employees. Two employees are 100% dedicated to public housing: Mountain View Manor Manager and the MVM Maintenance Manager. Another full time employee, Operations Manager, splits her time between management of the HCV Program, acting as the Homebuyer Coordinator, overview of MVM rent register, and other duties as needed for all four programs managed by WHA. The Executive Director is now involved less in the direct interaction with tenants (since moving the main office out of public housing) and the job has more emphasis in overall program administration, HUD compliance, budgeting, program development, board development, procurement, oversight of maintenance at MVM and other activities.

**e. Renovate or modernize public housing units:**

- Air conditioning to Mountain View Manor

Air conditioning and air circulation was added to the top floor of public housing in 2006-2007. WHA now seeks to update/rehabilitate the air exchangers at the end of the common hallways in 2010. The project is underway in the summer of 2010 with ARRA stimulus funds.

- Modernization: Increase use of community spaces
  - End of Hallways remodeled as sitting areas / atriums
  - Create an outside smoking area

WHA remodeled the end of the hallway in 2006-2008 and the formerly underused spaces are now nice seating areas with reading materials, sunny locations for plants, etc. The spaces are greatly improved as is their use.

WHA has not created an outdoor smoking area to date.

- Designate percentage of apartments as non-smoking

In March 2010, WHA designated the entire building as non smoking and adopted a two year grandfather clause for current tenants who smoke. WHA has designated smoking areas outside but has not built a dedicated smoking shelter though it has had several board discussions on the item.

- Remodel kitchens to include better ovens, hoods, ventilation, energy use
- Increase ventilation in apartments through replacement of kitchen hoods, bathroom fans

As of 2010, it is estimated that 50% of the apartments have had their kitchen hoods replaced and bathroom fans vented to produce better ventilation. WHA has not purchased new stoves due to the need to remodel the small kitchens as a part of the project.

- Create additional office space

In 2004-2005 the WHA occupied one apartment for the expansion of office space due to our growth in other housing activities. In 2005 WHA moved its offices out of public housing and began renting office space in the community. The move has been beneficial but difficult to fund the cost.

- Increase number of two bedroom apartments

WHA has not been able to increase the number of two bedroom apartments at the MVM and will include this item in the 2010-2015 PHA Plan. The need for two bedroom apartments is desired due to the projected increase of couples seeking public housing as men and women are living longer and there is a US Census projected increase in the elderly population overall starting in 2010.

- Increase / improve parking areas

WHA has increased parking and improved the parking areas since 2005. In an agreement with the City of Whitefish in exchange for an easement for the bike path (Demo –Disposition application was completed with HUD) the City improved our lower east parking areas to expand parking by five – six spaces as well as paving the once dirt driveway. However, WHA is now beginning to experience the need for more parking again and has 32 spaces for the 54 residents.

- Modernize apartments to include private entrances / patios on ground floor apartments

WHA did modernize one apartment to include a private entrance on the ground floor. In the process we learned that the process would be best if the apartment was vacant. We also learned it was cost prohibitive due to the need to relocate the radiant heating system that runs along the exterior wall to all apartments.

WHA will include this project in the next five year plan based on funding and our ability to update the heating system at the same time.

- Replace apartment windows

All windows were replaced in 2009-2010 utilizing the ARRA Capital Funds. The ambiance, accessibility, and energy efficiency of the windows is fantastic!

- Increase energy efficiency of building through the use of window coverings in community space. Includes blinds, awnings, and UV reduction film.

WHA purchased window film or UV shades for all apartments facing the eastern sun. In 2010, WHA has plans to purchase curtains for approximately 1/3 of the apartments to be replaced as needed.

- Complete water conservation projects: 1.6 gallon flush toilets and new faucets

WHA has replaced nearly all of the faucets now utilizing ARRA 2010 CFP and will plan to complete more faucets and replace toilets for water conservation.

- Create a satellite cable option for tenants of Mountain View Manor

This project was not feasible when we checked twice in the past. Should a better set up be available, WHA may yet complete this project.

- Purchase higher capacity laundry machines for bedding

Tenants continue to ask for higher capacity laundry machines but to date staff has not felt that it is feasible or necessary due to clean up. The request from tenants will remain in the five year plan.

- f. Demolish or dispose of obsolete public housing:
- g. Provide replacement public housing:

WHA hired an architect to locate other possible locations for new construction on MVM land. The MVM remains in good condition and the planning was an exercise in trying to create more units and understanding how a building 40 years older than the new construction would fit in a future building plan. To date no action has taken place and MVM has not been determined to be obsolete.

In the process, WHA identified a portion of land to the north east and along the river that cannot be developed and maintains plans to sell the small triangle to the neighbor.

There has not been a need to provide replacement housing.

- h. Other: (list below):

- Create computer lab for residents

WHA created a computer lab with internet with two computers. The lab is located in a community space that we renovated to our "library." The computer lab is in need of newer computers. This project will be included in the 2010-2015 Five Year Plan.

- Create more activities and educational sessions

WHA tried a number of activities over the last five years. A part time person was originally hired for the purpose of creating and conducting activities and the full portion of her wages was allocated to tenant services. Presently, this employee has grown into a full time position of managing the Manor and approximately 50% of her time is spent on tenant related services such as creating activities. The MVM presently has more activities than it ever has including Bingo three times a week, a weekly community lunch cooked and managed by a tenant, an exercise room, tenant gardens, weekly pot lucks, and a yearly barbecue in the back yard.

Educational sessions include a blood pressure clinic monthly, a yearly flu vaccination, and scheduled informational meetings from outside providers as requested.

In addition, the Golden Agers Senior Center is a neighbor of our public housing and WHA works to augment their activities and participation. For example, WHA financed the update of the bathrooms at the Senior Center for ADA accessibility so our tenants could participate. Many of our public housing tenants eat lunch daily at the Senior Center.

### **3. PHA Goal: Increase assisted housing choices**

Objectives:

- a. Provide voucher mobility counseling:

While WHA has become more versed in voucher mobility, it has not been able to create the FSS services that it had hoped in this area and will continue to work on this objective.

- b. Conduct outreach efforts to potential voucher landlords.

WHA does now have a list of potential landlords but could improve its outreach to landlords. With only 16 vouchers, WHA finds this task takes place automatically as we have a new tenant.

- c. Increase voucher payment standards: As needed to keep pace with rental rates

The WHA now has a procedure to review the voucher payment standards on a yearly basis.

- d. Implement voucher homeownership program:

WHA has not implemented a voucher homeownership program to date principally given the size of our program. However, WHA does manage a Homeownership Program and will seek to partner with Citizens Action Partnerships (Human Resources) for any Whitefish voucher holder wishing to purchase a home.

**e. Implement public housing or other homeownership programs:**

WHA created a homeownership Program in 2005 and has aided 20 low income households and one moderate income household purchase a home to date. There has been no participation from public housing tenants to date. However, Whitefish public housing is for the elderly and disabled and this is most likely the principle reason coupled with the fact that Whitefish has high cost resort housing prices which exceed low income levels by approximately \$117,000 (in 2009). WHA does have one HCV assisted household now interested in purchasing a home and on the wait list and WHA is investing) to aid them in this goal.

**f. Implement public housing site-based waiting lists:**

WHA has always maintained site based waiting lists and has only one public housing development.

**g. Convert public housing to vouchers:**

WHA did not check this objective in the 2005-2010 PHA Plan as it had opted not to given that we manage elderly and disabled public housing only. However, the current funding shortage for public housing in Whitefish and our small PHA status will make this an objective to reassess and WHA will include this assessment in the Five Year Plan 2010-2015.

**h. Other: (list below)**

- Create more new rental units through the use of tax credits, bonds, grants, Inclusionary Zoning Ordinance, etc.

WHA supported tax credit applications from Whitewater Inc. for the construction of three separate tax credit projects in Whitefish. All three were developed for a total of 70 units of tax credits.

WHA also worked hard with City of Whitefish staff and council for the adoption of an Inclusionary Zoning Ordinance in Whitefish. Following four years of work, the Ordinance was adopted as a voluntary program in late 2004. WHA has benefited from the use of the ordinance by private developers and has purchased a total of five units for homeownership opportunities. The five units were acquired at prices up to \$40,000 below their market values. The city has also received a number of "payment in lieu of housing" dedications but no developer with a pledge has yet to complete their development and therefore to pay into the City Housing Fund. The current economic downturn has not aided in this area as development is at a standstill.

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

**1. PHA Goal: Provide an improved living environment**

## Objectives:

- a.** Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
  - Support the City efforts to promote the use of the Inclusionary Zoning Ordinance to include 10% affordable units and ownership opportunities for low-income households.
  - Create housing opportunities with a mix of income groups
  - Maintain policy of income limits upon move in only

The WHA has done well in attracting higher income households to live at public housing. The “curb appeal” of public housing is excellent with our beautiful gardens, well kept lawns, location near town and on the river, full time maintenance and staff, and good tenant relations. As a small town PHA, the WHA has done a good job of attracting a mix of our elderly and disabled citizens.

WHA has not been successful to date in gaining a for-profit developer who would include affordable rental units in their developments but has gained five homeownership units located in two different neighborhoods. WHA is continuing its efforts to have a small rental complex (23 units) in a development of mixed income housing.

- b.** Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
  - Increase tenant based vouchers
  - Maintain minimum rent at \$50 month and hardship rent policies

WHA promotes income mixing in public housing and has maintained a \$50 minimum rent in its efforts to ensure housing availability for very low and no income households. WHA is concerned that the operating subsidy however will not be sufficient to meet the operations needs if it were to begin to house more no and very low income households. However, WHA in no way discourages low and no income tenants from tenancy and has a current mix of income ranges to demonstrate their non bias in this area.

WHA has been unable to increase the number of vouchers it manages and will include this goal in our 2010-2015 Five Year Plan.

- c.** Implement public housing security improvements:
  - Security Cameras
  - Resident Monitor / manager
  - Police patrol at night along bike path
  - Improve signage to public that Mountain View grounds and apartments are a Senior living environment
  - Maintain good working relationship with police force and dispatch
  - Maintain policy on evictions for criminal activity

WHA has implemented all of the above security improvements at one time or another

but not all are in place at this time. At one time, WHA used security cameras to discourage the theft of medications. The cameras came down after a time and no crime has taken place since that incident.

For two years WHA did have a resident manager but did not replace the tenant when she moved out. WHA has full time staff at the site five days a week, has good relations with the police and fire department, and has three tenants appointed to aid other tenants (locked out, health checks, etc.).

The WHA had one eviction for criminal activity in the past five years and has a procedure in place for “probation period” notifying the tenant that their action broke the lease and a second violation within six months will result in the termination of their lease.

- d. Designate developments or buildings for particular resident groups (elderly, persons with disabilities):
  - Create plan with neighboring Golden Agers for increase in services, activities for Seniors
  - Designate wing or MVM or aid in the construction of assisted living developments which include onsite services
  - Create new units on WHA land or Golden Agers for homeless, disabled, and those in need of transitional housing

WHA has not moved ahead with the above goals. New assisted living units were built in Whitefish in 2004 and to date the need has not been in this area. There is however a growing need for independent living rentals for low and very low income households.

- e. Other: (list below)
  - Create additional garden space, community gardens, greenhouse

WHA has tried a few strategies to increasing community gardens including an invitation to the community garden group on public housing land, partnership with the Agency on Aging for supplies and management of the gardens, tenant vegetable plots in our flower gardens and on the community deck, and sharing the watering duties with volunteer tenants. At present, WHA has created a common garden area in partnership with the Agency on Aging and up to 10 tenants have expressed interest in the activity. This is an ongoing activity. At present no greenhouse has been constructed but it is a good idea and will be included in the 2010-2015 Five Year Plan.

- Address difficulty of Seniors/disabled to get to lunch and activities at nearby Senior Center. This includes but is not limited to the purchase of a “golf cart” to transport MVM residents and use of new bike and pedestrian path.

WHA created and managed a voucher system for taxi rides for two years through a grant to the local Whitefish Community Foundation. The taxi in Whitefish has been intermittent in the last two years and the program is no longer in service. WHA will put

the purchase or purchase share of a golf cart with the Golden Agers on the next Five Year Plan.

- Improve relations and create plan for services with Senior Center
- Acquire adjacent city owned land, including land the Senior Center is located on in an effort to increase facilities for seniors.
- Encourage an increase in health care education courses at MVM or Senior Center

WHA has worked to increase relations with the Senior Center and has attended several board meetings over the years to this end. At present we have good relationship and will seek to increase facilities for seniors. The WHA has “testified” to city council for increased funding for the senior center and senior activities.

- Addition of bike and pedestrian path and increase in outside activities such as fishing in the Whitefish River from City parks, use of the bike path and garden areas of WHA property

The bike path is complete along the river edge of our public housing. We have seen an increase in usage over the years by public housing tenants. While there is fishing at the adjacent city park, WHA maintains a goal of having their own ADA accessible dock for the enjoyment of our wheelchair and mobility impaired tenants and the community.

The use of garden areas has fluctuated over the years and new gardens are being developed for the summer of 2010.

- Encourage and support Senior Theatre through the local community theatre company.

WHA has contributed financially in years past for senior activities at the local theatre and has benefited with senior programs, bus services to the theatre, and free tickets for tenants for select shows. This is a positive activity for the senior population across Whitefish.

- Encourage increased bus service by Eagle Transit in Whitefish, with emphasis on service to all Senior and disabled facilities.

Increased bus services have been realized by Eagle Transit. The bus stops at public housing three days a week and has on demand call for rides. Ridership has increased due to the efforts of the local Agency on Aging Council.

- Continue and expand computer use for tenants

As mentioned above, WHA has a computer lab of two computers in our library. This is an ongoing goal and will be included in the goals for the future.

- Encourage and expand on services/relations with all Senior and Disabled housing developments across community.

The Director has a working relationship with the majority of housing providers and landlords of our senior and disabled populations. Larger landlords and service providers for the elderly and disabled are aware of the services and of the Whitefish Housing Authority and contact us with referrals for new tenants.

WHA aided in founding and attended a county wide work group of housing professionals for three years between 2006-2009 for the purpose of creating good communications. The group has since disbanded. Communications between entities are open. As a small agency, WHA must partner on a regular basis and communications between housing entities in the areas remains a goal.

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

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

Objectives:

- a. Increase the number and percentage of employed persons in assisted families:
  - Network for services with Job Service / homeless shelter programs
  - Outreach with local employers
  - Create jobs for tenants at WHA
  - Teach financial management course
  - Educate tenants on the Earned Income policy
- b. Provide or attract supportive services to improve assistance recipients' employability:
- c. Provide or attract supportive services to increase independence for the elderly or families with disabilities.

WHA has not made much progress in the above goals over the years. In part this is due to the population we serve being elderly and disabled. However in our HCV Program, WHA recognizes the need to create the relationships and education mentioned above and will keep the effort as an ongoing goal.

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

#### 1. PHA Goal: Ensure equal opportunity and affirmatively further fair housing

Objectives:

- a. Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:
- b. 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:

WHA is an equal opportunity housing provider and has policies in place ensuring that it will assist households regardless of race, color, religion, national origin, sex, familial status and disability.

WHA staff attends fair housing training and maintains contact with the Montana Fair Housing.

- c. Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
  - Increase number of accessible entrances to MVM building / eliminate all steps in sidewalks

All entrances to the MVM have now been rehabilitated and are fully accessible. All steps have been eliminated in our sidewalks and entrances. The main entrance was updated for increased accessibility in 2010 and three (of the total five) exterior doors are now being replaced with lighter, more accessible doors and hardware.

- Remodel office to accommodate wheelchair/walker entrance, use of desk space for writing, and seating for tenants or applicants

The office space was remodeled at no cost by removing a tall counter that once separated the office space. The doorways however remain in need of widening and this project will be part of the Five Year Plan.

- Create and/or expand on ADA access from Manor to Senior Center

The addition of the bike path and the pavement of the lower road and parking lot greatly increased the ADA access from the Manor to the Senior Center. However, more work needs to take place in this area and the goal will remain on the next Five Year Plan.

- Increase / Improve supply of WHA loaner wheelchairs, walkers, tub seats, etc.

WHA purchased one more used wheelchair but no longer has a supply of loaner tub seats and walkers.

- Acquire additional furniture suitable for persons with disabilities / Seniors

WHA acquired furniture that is suitable for use by persons with disabilities and seniors including new tables in the community dining room, and chairs with arms in the main lobby and hallway seating areas.

- Modernize exercise room and equipment

Through the aid of the local bike shop (owner is the neighbor to our public housing) new exercise equipment has been gifted, rented and purchased for the exercise room. The room underwent a remodel several years ago and the cement painted floor is now carpeted. The room also serves as our jigsaw puzzle space.

- Create additional handicapped parking spaces including sidewalks

WHA has three handicapped spaces and all steps in sidewalks have been removed since 2005.

- Promote accessible features in new construction projects, including for profit developments / houses

WHA promotes accessibility at our public housing and has promoted accessible entrances for “Visitability” in our Homeownership Program but has not conducted outreach to the community in this area. WHA will keep this goal moving forward.

- Modernize front entrance for easier bus loading, drop off/ pick up
- Rehabilitate rain gutters to ensure proper drainage and stop the ice buildup in walking areas

WHA has modernized the front door system but has not found it economically feasible to remodel the front entrance. The issue we are trying to alleviate is the ice and snow build up that make it hard to access our main entry during the winter months. We have improved the drainage so as to keep ice from building up but this remains a need and a constant maintenance project in the winter months.

d. Other: (list below):

- Create additional covered parking

While we have investigated this project several times, to date no plan has been affordable and it remains a request of our tenants.

- Move main office out of Mountain View Manor to a location more accessible and visible.

The main office of the WHA is now off site of public housing. It spent nearly three years on main street and was very visible. The visibility greatly increased awareness of our existence and services. Just over a year ago, the offices moved to a new location (lower rent) that is accessible.

## **V. Other PHA Goals and Objectives: (list below):**

- a. Acquire existing rental units including current for profit and preservation units
- b. Expand maintenance to other WHA properties / assisted units for contract

WHA has not acquired any more rental units and will include this goal for the future.

- c. Move main PHA office to outside location

The main office was moved and remains off site since 2005.

- d. Aid low and moderate-income persons, seniors and disabled persons find housing.

WHA has aided low to moderate income persons find housing opportunities including rentals and homeownership opportunities. WHA would like to grow in this area.

- e. Increase WHA staff in order to be able to offer more services

WHA expanded and then shrank back to a staff of four full time persons. WHA now seeks to stabilize the funding to maintain the four positions as well as one part time position for the general office, clients and program needs.

- f. Obtain CDBG, HOME, and other federal and state grants for the purpose of increasing affordable housing opportunities within the PHA jurisdiction.

Since 2000, WHA has wrote and won over \$1.6 million dollars in federal and private grants for the Homeownership and Housing Rehabilitation Programs. WHA will continue this effort.

- g. Encourage and support additional public transportation.

WHA attended city meetings on the issue and remains in support of increased public transportation.

- h. Purchase City properties for the purpose of expanding affordable housing and services to low income, disabled and senior residents. This includes the purchase of the adjacent lands, Golden Agers Senior Center, and other City owned properties.
- i. Continue collaborative efforts with City of Whitefish in the area of housing needs.

WHA has not been able to obtain city properties to date but has had several conversations with the City over the years on the topic. WHA participated in the City of Whitefish's investigation and then design of the Voluntary Inclusionary Zoning Ordinance and has purchased five homes over the years at prices up to \$40,000 below their market value due to a developer's use of the Ordinance.

In 2008 the City of Whitefish sponsored and funded the 2008 Whitefish Housing Needs Assessment. In addition, the city has sponsored a HOME grant, a CDBG application for housing, and two CDBG Planning Grants.

WHA will continue to work with the City of Whitefish.



Dear Resident,

**The Board of Commissioners of the Whitefish Housing Authority will meet on Wednesday, May 19<sup>th</sup> at 4pm in the Community Room of the Mountain View Manor.**

**On the agenda is the discussion and adoption of the 2010 Public Housing Authority Five Year Plan.**

**In years past, we have met as the Resident Advisory Board at a special meeting. This year all commenting tenants will be considered to be on the Resident Advisory Board and the comment times are open until 5pm on May 19<sup>th</sup> and include:**

- 1. The Resident Council Meeting on 5/19 at 2pm.**
- 2. The regular Board meeting on 5/20 at 4pm**
- 3. And at any time written comments can be given to the office.**

**5/20/10 Update with Resident Advisory Council:**

**No comments were received from the tenants or the RAB. Two Resident Commissioners participated at the regular Board Meeting. Items 1.G, 1.H, 1-I, 2-N, 2-O, 3-I, goal #7, and goal #8 were added in board discussion on 5/20/10. The Five Year Plan was then adopted, WHA Resolution #207.**



## **IT'S PLANNING TIME**

Each year, the residents of Mountain View Manor are provided with this opportunity to voice their concerns, needs and requests. As a resident you are invited to become involved in the planning process.

### **PLEASE VOLUNTEER:**

The Whitefish Housing Authority invites all Mountain View Manor residents to participate in the creation of the 2010 Public Housing Authority Five Year Plan. The purpose of the meeting is to discuss the tenant wants and needs at the Mountain View Manor and a strategy to meeting those needs.

Your input is important. If you are unable to attend but would like to participate in person, please submit your written comments to the office.

The residents are provided with this opportunity to voice their concerns, needs suggestions and requests. As a resident you are invited to become involved in the planning process. The PHA also gains essential information from the residents about the improvements that need to be made at the agency's developments and residents' self-sufficiency needs. This information helps the PHA to set priorities for capital improvements and resident services.

Thank you for your time,

SueAnn Grogan  
Executive Director

## IT'S PLANNING TIME

Each year, the residents of Mountain View Manor are provided with this opportunity to voice their concerns, needs and requests. As a resident you are invited to become involved in the planning process.

What comment, concern, need or request do you have in regards to improvements at the Mountain View Manor?



---

---

---

---

---

---

---

---

---

---

---



## IT'S PLANNING TIME

Each year, the residents of Mountain View Manor are provided with this opportunity to voice their concerns, needs and requests. As a resident you are invited to become involved in the planning process.

What comment, concern, need or request do you have in regards to improvements at the Mountain View Manor?

---

---

---

---

---

---

---

---

---

---

---

**PHA Certifications of Compliance with the PHA Plans and Related Regulations:  
Board Resolution to Accompany the PHA 5-Year and Annual PHA Plan**

*Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairman or other authorized PHA official if there is no Board of Commissioners, I approve the submission of the  5-Year and/or  Annual PHA Plan for the PHA fiscal year beginning 2010, hereinafter referred to as "the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:*

1. The Plan is consistent with the applicable comprehensive housing affordability strategy (or any plan incorporating such strategy) for the jurisdiction in which the PHA is located.
2. The Plan contains a certification by the appropriate State or local officials that the Plan is consistent with the applicable Consolidated Plan, which includes a certification that requires the preparation of an Analysis of Impediments to Fair Housing Choice, for the PHA's jurisdiction and a description of the manner in which the PHA Plan is consistent with the applicable Consolidated Plan.
3. The PHA certifies that there has been no change, significant or otherwise, to the Capital Fund Program (and Capital Fund Program/Replacement Housing Factor) Annual Statement(s), since submission of its last approved Annual Plan. The Capital Fund Program Annual Statement/Annual Statement/Performance and Evaluation Report must be submitted annually even if there is no change.
4. The PHA has established a Resident Advisory Board or Boards, the membership of which represents the residents assisted by the PHA, consulted with this Board or Boards in developing the Plan, and considered the recommendations of the Board or Boards (24 CFR 903.13). The PHA has included in the Plan submission a copy of the recommendations made by the Resident Advisory Board or Boards and a description of the manner in which the Plan addresses these recommendations.
5. The PHA made the proposed Plan and all information relevant to the public hearing available for public inspection at least 45 days before the hearing, published a notice that a hearing would be held and conducted a hearing to discuss the Plan and invited public comment.
6. The PHA certifies that it will carry out the Plan in conformity with Title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990.
7. The PHA will affirmatively further fair housing by examining their programs or proposed programs, identify any impediments to fair housing choice within those programs, address those impediments in a reasonable fashion in view of the resources available and work with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement and maintain records reflecting these analyses and actions.
8. For PHA Plan that includes a policy for site based waiting lists:
  - The PHA regularly submits required data to HUD's 50058 PIC/IMS Module in an accurate, complete and timely manner (as specified in PIH Notice 2006-24);
  - The system of site-based waiting lists provides for full disclosure to each applicant in the selection of the development in which to reside, including basic information about available sites; and an estimate of the period of time the applicant would likely have to wait to be admitted to units of different sizes and types at each site;
  - Adoption of site-based waiting list would not violate any court order or settlement agreement or be inconsistent with a pending complaint brought by HUD;
  - The PHA shall take reasonable measures to assure that such waiting list is consistent with affirmatively furthering fair housing;
  - The PHA provides for review of its site-based waiting list policy to determine if it is consistent with civil rights laws and certifications, as specified in 24 CFR part 903.7(c)(1).
9. The PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.
10. The PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.
11. The PHA will comply with the requirements of section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low-or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part 135.

12. The PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.
13. The PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).
14. The PHA will provide the responsible entity or HUD any documentation that the responsible entity or HUD needs to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58 or Part 50, respectively.
15. With respect to public housing the PHA will comply with Davis-Bacon or HUD determined wage rate requirements under Section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.
16. The PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.
17. The PHA will comply with the Lead-Based Paint Poisoning Prevention Act, the Residential Lead-Based Paint Hazard Reduction Act of 1992, and 24 CFR Part 35.
18. The PHA will comply with the policies, guidelines, and requirements of OMB Circular No. A-87 (Cost Principles for State, Local and Indian Tribal Governments), 2 CFR Part 225, and 24 CFR Part 85 (Administrative Requirements for Grants and Cooperative Agreements to State, Local and Federally Recognized Indian Tribal Governments).
19. The PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the regulations and included in its Plan.
20. All attachments to the Plan have been and will continue to be available at all times and all locations that the PHA Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the PHA in its PHA Plan and will continue to be made available at least at the primary business office of the PHA.
21. The PHA provides assurance as part of this certification that:
  - (i) The Resident Advisory Board had an opportunity to review and comment on the changes to the policies and programs before implementation by the PHA;
  - (ii) The changes were duly approved by the PHA Board of Directors (or similar governing body); and
  - (iii) The revised policies and programs are available for review and inspection, at the principal office of the PHA during normal business hours.
22. The PHA certifies that it is in compliance with all applicable Federal statutory and regulatory requirements.

Whitefish Housing Authority  
PHA Name

MT015  
PHA Number/HA Code

5-Year PHA Plan for Fiscal Years 20 10 - 20 15

Annual PHA Plan for Fiscal Years 20 10 - 20 11

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<br><u>Judy Sney</u> | Title<br><u>CHAIR, BOARD OF COMMISSIONERS</u> |
| Signature<br><u>Judith Sney</u>                 | Date<br><u>05/19/10</u>                       |

# Certification for a Drug-Free Workplace

U.S. Department of Housing and Urban Development

Applicant Name

Whitefish Housing Authority

Program/Activity Receiving Federal Grant Funding

Public Housing

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.)

MOUNTAIN VIEW MANOR, 100 E 4th St, WHITEFISH, MT 59937

WHA OFFICE, 142 RAILWAY STREET, WHITEFISH, MT 59937

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 | Title              |
| Sue Ann Grogan              | EXECUTIVE DIRECTOR |
| Signature                   | Date               |
|                             | 4/17/2010          |

# Certification of Payments to Influence Federal Transactions

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

Applicant Name

WHITEFISH HOUSING AUTHORITY

Program/Activity Receiving Federal Grant Funding

PUBLIC HOUSING

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, Disclosure Form to Report Lobbying, in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

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

SUE ANN GREGAN

Title

EXECUTIVE DIRECTOR

Signature

*Sue Ann Gregan*

Date (mm/dd/yyyy)

4/17/2010

**DISCLOSURE OF LOBBYING ACTIVITIES**

Approved by OMB

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352

0348-0046

(See reverse for public burden disclosure.)

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                               |                                                                                                                                                                                                                  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1. Type of Federal Action:</b><br><input type="checkbox"/> a. contract<br><input type="checkbox"/> b. grant<br><input type="checkbox"/> c. cooperative agreement<br><input type="checkbox"/> d. loan<br><input type="checkbox"/> e. loan guarantee<br><input type="checkbox"/> f. loan insurance                                                                                                                                                                                                                                                                    | <b>2. Status of Federal Action:</b><br><input type="checkbox"/> a. bid/offer/application<br><input type="checkbox"/> b. initial award<br><input type="checkbox"/> c. post-award                               | <b>3. Report Type:</b><br><input type="checkbox"/> a. initial filing<br><input type="checkbox"/> b. material change<br><b>For Material Change Only:</b><br>year _____ quarter _____<br>date of last report _____ |
| <b>4. Name and Address of Reporting Entity:</b><br><input type="checkbox"/> Prime <input type="checkbox"/> Subawardee<br>Tier _____, if known:<br><br>Congressional District, if known: 4c                                                                                                                                                                                                                                                                                                                                                                             | <b>5. If Reporting Entity in No. 4 is a Subawardee, Enter Name and Address of Prime:</b><br><br>Congressional District, if known:                                                                             |                                                                                                                                                                                                                  |
| <b>6. Federal Department/Agency:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <b>7. Federal Program Name/Description:</b><br><br>CFDA Number, if applicable: _____                                                                                                                          |                                                                                                                                                                                                                  |
| <b>8. Federal Action Number, if known:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <b>9. Award Amount, if known:</b><br>\$                                                                                                                                                                       |                                                                                                                                                                                                                  |
| <b>10. a. Name and Address of Lobbying Registrant</b><br>(if individual, last name, first name, MI):<br><br><div style="font-size: 2em; color: blue; text-align: center;">NO LOBBYING</div>                                                                                                                                                                                                                                                                                                                                                                            | <b>b. Individuals Performing Services</b> (including address if different from No. 10a)<br>(last name, first name, MI):<br><br><div style="font-size: 2em; color: blue; text-align: center;">ACTIVITIES</div> |                                                                                                                                                                                                                  |
| <b>11.</b> Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure. | Signature: <u>Sue Ann Grogan</u><br>Print Name: <u>SUE ANN GROGAN</u><br>Title: <u>EXECUTIVE DIRECTOR</u><br>Telephone No.: <u>(406)822-4143</u> Date: <u>4/17/10</u>                                         |                                                                                                                                                                                                                  |
| <b>Federal Use Only:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                               | Authorized for Local Reproduction<br>Standard Form LLL (Rev. 7-97)                                                                                                                                               |

|                                                 |                                                                                                                              |                                                            |
|-------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|
| <b>Part I: Summary</b>                          |                                                                                                                              |                                                            |
| <b>PHA Name:</b><br>Whitefish Housing Authority | <b>Grant Type and Number</b><br>Capital Fund Program Grant No:<br>Replacement Housing Factor Grant No:<br>Date of CFFP: 2010 | <b>FFY of Grant: 2010</b><br><b>FFY of Grant Approval:</b> |

**Type of Grant**  
 **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 | Summary by Development Account                               | Total Estimated Cost |                      | Total Actual Cost <sup>1</sup> |          |
|------|--------------------------------------------------------------|----------------------|----------------------|--------------------------------|----------|
|      |                                                              | Original             | Revised <sup>2</sup> | Obligated                      | Expended |
| 1    | Total non-CFP Funds                                          |                      |                      |                                |          |
| 2    | 1406 Operations (may not exceed 20% of line 21) <sup>3</sup> | 25,000               |                      |                                |          |
| 3    | 1408 Management Improvements                                 |                      |                      |                                |          |
| 4    | 1410 Administration (may not exceed 10% of line 21)          |                      |                      |                                |          |
| 5    | 1411 Audit                                                   |                      |                      |                                |          |
| 6    | 1415 Liquidated Damages                                      |                      |                      |                                |          |
| 7    | 1430 Fees and Costs                                          |                      |                      |                                |          |
| 8    | 1440 Site Acquisition                                        |                      |                      |                                |          |
| 9    | 1450 Site Improvement                                        | 15,000               |                      |                                |          |
| 10   | 1460 Dwelling Structures                                     | 25,000               |                      |                                |          |
| 11   | 1465.1 Dwelling Equipment—Nonexpendable                      |                      |                      |                                |          |
| 12   | 1470 Non-dwelling Structures                                 |                      |                      |                                |          |
| 13   | 1475 Non-dwelling Equipment                                  |                      |                      |                                |          |
| 14   | 1485 Demolition                                              |                      |                      |                                |          |
| 15   | 1492 Moving to Work Demonstration                            |                      |                      |                                |          |
| 16   | 1495.1 Relocation Costs                                      |                      |                      |                                |          |
| 17   | 1499 Development Activities <sup>4</sup>                     |                      |                      |                                |          |

<sup>1</sup> To be completed for the Performance and Evaluation Report.

<sup>2</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for operations.

<sup>4</sup> RHF funds shall be included here.

| <b>Part I: Summary</b>                                                        |                                                                                                                         |                                                                  |                      |                                                                   |          |
|-------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|----------------------|-------------------------------------------------------------------|----------|
| <b>PHA Name:</b><br>Whitefish Housing Authority                               | <b>Grant Type and Number</b><br>Capital Fund Program Grant No:<br>Replacement Housing Factor Grant No:<br>Date of CFFP: | <b>FFY of Grant:2010</b><br><b>FFY of Grant Approval: 2010</b>   |                      |                                                                   |          |
| <b>Type of Grant</b>                                                          |                                                                                                                         |                                                                  |                      |                                                                   |          |
| <input type="checkbox"/> Original Annual Statement                            |                                                                                                                         | <input type="checkbox"/> Reserve for Disasters/Emergencies       |                      | <input type="checkbox"/> Revised Annual Statement (revision no: ) |          |
| <input type="checkbox"/> Performance and Evaluation Report for Period Ending: |                                                                                                                         | <input type="checkbox"/> Final Performance and Evaluation Report |                      |                                                                   |          |
| Line                                                                          | Summary by Development Account                                                                                          | Total Estimated Cost                                             |                      | Total Actual Cost <sup>1</sup>                                    |          |
|                                                                               |                                                                                                                         | Original                                                         | Revised <sup>2</sup> | Obligated                                                         | Expended |
| 18a                                                                           | 1501 Collateralization or Debt Service paid by the PHA                                                                  |                                                                  |                      |                                                                   |          |
| 18ba                                                                          | 9000 Collateralization or Debt Service paid Via System of Direct Payment                                                |                                                                  |                      |                                                                   |          |
| 19                                                                            | 1502 Contingency (may not exceed 8% of line 20)                                                                         |                                                                  |                      |                                                                   |          |
| 20                                                                            | Amount of Annual Grant:: (sum of lines 2 - 19)                                                                          | 65,000                                                           |                      |                                                                   |          |
| 21                                                                            | Amount of line 20 Related to LBP Activities                                                                             | 0                                                                |                      |                                                                   |          |
| 22                                                                            | Amount of line 20 Related to Section 504 Activities                                                                     | 10,000                                                           |                      |                                                                   |          |
| 23                                                                            | Amount of line 20 Related to Security - Soft Costs                                                                      |                                                                  |                      |                                                                   |          |
| 24                                                                            | Amount of line 20 Related to Security - Hard Costs                                                                      |                                                                  |                      |                                                                   |          |
| 25                                                                            | Amount of line 20 Related to Energy Conservation Measures                                                               | 20,000                                                           |                      |                                                                   |          |
| <b>Signature of Executive Director</b>                                        |                                                                                                                         | <b>Date</b>                                                      |                      | <b>Signature of Public Housing Director</b>                       |          |
|                                                                               |                                                                                                                         |                                                                  |                      | <b>Date</b>                                                       |          |

<sup>1</sup> To be completed for the Performance and Evaluation Report.

<sup>2</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for operations.

<sup>4</sup> RHF funds shall be included here.









**Capital Fund Program—Five-Year Action Plan**

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 Expires 4/30/2011

| <b>Part I: Summary</b> |                                                                     |                                            |                                                 |                                              |                                                          |                                                 |
|------------------------|---------------------------------------------------------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|----------------------------------------------------------|-------------------------------------------------|
| PHA Name/Number        |                                                                     | Locality (City/County & State)             |                                                 |                                              | <input checked="" type="checkbox"/> Original 5-Year Plan | <input type="checkbox"/> Revision No:           |
| A.                     | Development Number and Name<br>MT015<br>Whitefish Housing Authority | Work Statement for Year 1<br>FFY 2010_____ | Work Statement for Year 2<br>FFY _____2011_____ | Work Statement for Year 3<br>FFY __2012_____ | Work Statement for Year 4<br>FFY _2013_____              | Work Statement for Year 5<br>FFY _____2014_____ |
| B.                     | Physical Improvements Subtotal                                      | Annual Statement                           | 30,000                                          | 35,000                                       | 35,000                                                   | 50,000                                          |
| C.                     | Management Improvements                                             |                                            |                                                 |                                              |                                                          |                                                 |
| D.                     | PHA-Wide Non-dwelling Structures and Equipment                      |                                            |                                                 |                                              |                                                          |                                                 |
| E.                     | Administration                                                      |                                            | 20,000                                          | 20,000                                       | 20,000                                                   | 15,000                                          |
| F.                     | Other                                                               |                                            |                                                 |                                              |                                                          |                                                 |
| G.                     | Operations                                                          |                                            |                                                 |                                              |                                                          |                                                 |
| H.                     | Demolition                                                          |                                            |                                                 |                                              |                                                          |                                                 |
| I.                     | Development                                                         |                                            | 15,000                                          | 10,000                                       | 10,000                                                   |                                                 |
| J.                     | Capital Fund Financing – Debt Service                               |                                            |                                                 |                                              |                                                          |                                                 |
| K.                     | Total CFP Funds                                                     |                                            | 65,000                                          | 65,000                                       | 65,000                                                   | 65,000                                          |
| L.                     | Total Non-CFP Funds                                                 |                                            |                                                 |                                              |                                                          | 200,000                                         |
| M.                     | Grand Total                                                         |                                            | 65,000                                          | 65,000                                       | 65,000                                                   | 265,000                                         |

**Capital Fund Program—Five-Year Action Plan**

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 Expires 4/30/2011

**Part I: Summary (Continuation)**

| PHA Name/Number |                             | Locality (City/county & State)         |                                        |                                        |                                        | <input checked="" type="checkbox"/> Original 5-Year Plan | <input type="checkbox"/> Revision No: |
|-----------------|-----------------------------|----------------------------------------|----------------------------------------|----------------------------------------|----------------------------------------|----------------------------------------------------------|---------------------------------------|
| A.              | Development Number and Name | Work Statement for Year 1<br>FFY _____ | Work Statement for Year 2<br>FFY _____ | Work Statement for Year 3<br>FFY _____ | Work Statement for Year 4<br>FFY _____ | Work Statement for Year 5<br>FFY _____                   |                                       |
|                 |                             | Annual Statement                       |                                        |                                        |                                        |                                                          |                                       |
|                 | MT015                       |                                        |                                        |                                        |                                        |                                                          |                                       |
|                 |                             |                                        |                                        |                                        |                                        |                                                          |                                       |
|                 |                             |                                        |                                        |                                        |                                        |                                                          |                                       |
|                 |                             |                                        |                                        |                                        |                                        |                                                          |                                       |
|                 |                             |                                        |                                        |                                        |                                        |                                                          |                                       |
|                 |                             |                                        |                                        |                                        |                                        |                                                          |                                       |
|                 |                             |                                        |                                        |                                        |                                        |                                                          |                                       |
|                 |                             |                                        |                                        |                                        |                                        |                                                          |                                       |
|                 |                             |                                        |                                        |                                        |                                        |                                                          |                                       |
|                 |                             |                                        |                                        |                                        |                                        |                                                          |                                       |
|                 |                             |                                        |                                        |                                        |                                        |                                                          |                                       |
|                 |                             |                                        |                                        |                                        |                                        |                                                          |                                       |





| <b>Part III: Supporting Pages – Management Needs Work Statement(s)</b> |                                                                         |                |                                                                         |                |
|------------------------------------------------------------------------|-------------------------------------------------------------------------|----------------|-------------------------------------------------------------------------|----------------|
| Work Statement for Year 1 FFY _____                                    | Work Statement for Year ____2011_____<br>FFY _____                      |                | Work Statement for Year: ____2012_____<br>FFY _____                     |                |
|                                                                        | Development Number/Name<br>General Description of Major Work Categories | Estimated Cost | Development Number/Name<br>General Description of Major Work Categories | Estimated Cost |
| See                                                                    |                                                                         |                |                                                                         |                |
| Annual                                                                 |                                                                         |                |                                                                         |                |
| Statement                                                              |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        |                                                                         |                |                                                                         |                |
|                                                                        | Subtotal of Estimated Cost                                              | \$             | Subtotal of Estimated Cost                                              | \$             |

