



# **PORTAGE METROPOLITAN HOUSING AUTHORITY**

## **2009 ANNUAL MTW REPORT**

Portage Metropolitan Housing Authority (OH 031)  
2832 State Route 59  
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Overview of the Agency's MTW Goals and Objectives for the Year  
Portage Metropolitan Housing Authority established the following goals and objectives for 2009:

**Achieve and Maintain Excellence in Property Management**

- **PMHA will continue to achieve property management results for Public Housing that equate to High Performer status.**

*In 2008, the total leasing days for West Side units was 13 days compared to 5.2 days in 2009. Total turn around days was 25.6 in 2008 and 13.5 in 2009.*

*In 2008, the total leasing days for East Side units was 8.4 days compared to 7.7 days in 2009. Total turn around days was 21.1 days in 2008 and 13.9 days in 2009.*

*During 2009, a concerted public housing department effort was undertaken to develop and maintain applications that are processed so applicant move-in time could be shortened.*

*Also, an album was produced that includes pictures of both outside and inside shots of the various developments and units. Applicants are able to view these pictures to get an appreciation of our housing stock. By being educated about the housing, neighborhood, etc, applicants are able to accept/reject a unit without having seen the actual unit being offered.*

*Debt at the time of move-out was reduced when comparing 2008 data to 2009. For West Side units, 2008 debt was \$9,267 and 2009 debt was \$2,769. For East Side units, 2008 debt was \$17,865 and \$8,090 in 2009. During 2009, an aggressive housekeeping inspection and education program was developed so unit damage could be assessed and repaired during tenancy as opposed to move-out time. The ROSS 2006 Case Manager worked with residents to solve clutter problems and provided ideas to residents to solve housecleaning issues.*

*The final initiative undertaken by the PH department was to keep residents housed and to avoid terminations unless for criminal or severe lease violations. Thus, the number of terminations decreased 44% or from 16 in 2008 to 9 in 2009. To keep residents housed, emphasis was placed on a more aggressive approach toward debt collection and enforcement of repayment agreements. "Last Chance" agreements were signed and increased linkages to community resources were initiated.*

- **PMHA will review and amend admissions preferences in 2009 after community consultation and assessment of housing needs in Portage County.**  
*With an unemployment rate of 10.7% in Portage County, the Public Housing staff reviewed the feasibility of providing a preference to current unemployed applicants receiving unemployment compensation who were employed at the time of application. No changes in admissions preferences were made in 2009.*
- **PMHA will continue assessing opportunities for simplifying rent calculations**  
*Public Housing staff continued to offer suggestions to the Executive Director and to receive ideas from residents, participants and the public*

#### **Achieve and Maintain Excellence in Tenant-Based Housing Programs**

- **PMHA will continue to achieve program results equating to High Performer status.**  
*Although PMHA is not scored according to SEMAP, the assessment for Housing Choice Voucher program activities, an internal review of SEMAP indicators indicated PMHA would be scored as a High Performer in its tenant-based voucher program.*
- **Tenant-based housing programs will achieve and maintain full lease-up.**  
*PMHA's Housing Choice Voucher Program achieved 100% lease-up for its Tenant-Based and Project-based programs, and was maintaining that lease-up at the end of 2009.*
- **Five households will become homeowners through the Housing Choice Voucher Homeownership Program in 2009.**  
*PMHA had 4 successful closings for new homeowners in 2009, despite more stringent lending criteria from lenders.*
- **PMHA will review and amend admissions preferences in 2009 after community consultation and assessment of housing needs in Portage County.**  
*After a review of current admissions standards, waiting lists and identified community housing needs, PMHA determined that it was not necessary to change its admissions preferences.*
- **PMHA will continue assessing opportunities for simplifying rent calculations.**

*Housing Choice Voucher staff continued to offer suggestions to the Executive Director and to receive ideas from residents, participants and the public.*

#### **Improve Productivity and Cost Effectiveness**

- **A pilot program will be launched in 2009 to explore the effectiveness of electronic funds transfer for the purpose of Housing Assistance Payments to landlords involved in the Housing Choice Voucher Program. *The pilot program was postponed with the examination and review of electronic funds transfer for HAP payments to landlords. At present, the software system of PMHA combined with the procedures needed for appropriate fiscal management did not indicate it was likely to be effective yet for PMHA.***
- **PMHA will determine the feasibility of an electronic debit card system for the distribution of utility allowance payments to residents of Public Housing and participants in the Housing Choice Voucher Program. *PMHA staff gathered information regarding electronic debit cards as a means of improving efficiency in distributing utility allowances to residents. Although the review appeared to indicate the change would make PMHA more efficient, there would be not be a net benefit to the living situation of utility allowance payment recipients.***
- **During 2009, electronic direct deposit for PMHA employee payroll will be offered as a voluntary benefit. *Voluntary electronic direct deposit for employee payroll is now offered to all employees.***
- **The Yardi software will be upgraded and staff provided training in the applicable features of the program for managing PMHA programs and operations. *Yardi software did undergo upgrades and staff participated in ongoing training into new and existing features. PMHA postponed implementation of using computer technology in lieu of written HQS reports for inspections until 2010.***

#### **Collaborate with Community Partners to Leverage Resources to Benefit Households Assisted by PMHA and Portage County**

- **PMHA will investigate new funding opportunities to continue supportive services and housing for transitional housing programs operated by PATH and PMHA at Community Estates and Renaissance Place. *PMHA was unsuccessful in locating new funding opportunities for supportive services to promote transitional housing for continuing***

*projects. Executive Director Fred Zawilinski did participate in the Corporation for Supportive Housing's Supportive Housing Institute in 2009-2010 to learn more about developing new supportive housing and explore the possibility of developing housing for youth aging out of foster care.*

- **PMHA will investigate methods of inter-agency cooperation that will lessen barriers to assistance for applicants and participants.**

*With the implementation of the ROSS 2008 Neighborhood Networks Program, old and new agencies became partners on behalf of both Public Housing and Section 8 participants. A total of 10 partnerships were formed. The most exciting partner is the Community Action Council of Portage County with offers a computer technology program to low-income persons. As a result, a Section 8 participant serves as a tech person and trainer for four NNP sites, all located at public housing developments.*

*The Director also is working with the Portage County Regional Planning Department to foster and promote Section 3 opportunities on behalf of low-income residents in conjunction with the ARRA stimulus funds available to Portage County.*

**Public Housing continues its partnerships with:**

- *Portage Area Transitional Housing program operated by Family and Community Services to serve 42 previous homeless families at Renaissance Place and Community Estates;*
- *Coleman Professional Services to serve 13 mentally ill residents at Walnut House;*
- *Independence, Inc. to serve 8 developmentally disabled persons at Washington Group Home and;*
- *Family and Community Services to serve 6 court ordered drug offenders to receive rehabilitation services at Willow Street units*
- *Maplewood Career Center for the operation of the Opportunity Resource Center which is housed in a building owned by the PMHA and provides GED and basic adult educational programming for residents and general population*
- *Portage County Jobs and Family Services on behalf of the Work Experience Program which allows TANF recipients to meet their eligibility by working at the PMHA*
- *Neighborhood Development Services which provides credit and homeownership counseling, mortgage resources, and other supportive services to PMHA participants interested in*

*homeownership and to those participants who actually achieved homeownership*

- *Family and Community Services which enables the PMHA to serve as a Host Agency for the Senior Companion Program. This program provides opportunity for Senior residents to serve as Companions as well as receive in-home services from this program. The Housing and Special Projects Manager serves on the Advisory Board for this program.*
- *Mature Services, which enables Title V Senior Aides to work at the PMHA in support roles to various ROSS programs.*

## **General Housing Authority Operating Information**

### Housing Stock Information

Number of Public Housing units at the end of the Plan year; discuss any changes over 10%

**PMHA operates 305 units of Public Housing. This number remained constant during 2009. Two units are dedicated to providing supportive on-site services and are unavailable for residential occupancy. This number is also unchanged during 2009.**

Description of any significant capital expenditures by development:

**No capital expenditures in 2009 met the definition of significant in a particular development.**

Description of any new Public Housing units added during the year by development:

**Portage Metropolitan Housing Authority, as planned, did not add any new Public Housing units to its Public Housing Program in 2009.**

Number of units removed from the inventory during the year by development specifying the justification for the removal:

**No units were removed from the Public Housing portfolio during 2009. Some units have been taken off-line for the purposes of a substantial rehabilitation, including review of environmental factors such as asbestos and lead. These units have been scattered-site homes that became vacant during the year and thus convenient for this scope of work.**

Number of Housing Choice Vouchers units authorized at the end of the Plan year:

**Portage Metropolitan Housing Authority has 1,524 Housing Choice Vouchers included under Moving to Work provisions. PMHA has an additional 74 Mainstream Housing Choice Vouchers that follow conventional HCV regulations, 18 enhanced Housing Choice Vouchers that follow the regulations and laws applicable to those types of vouchers. There were no changes made to the number of units available.**

Number of HCV units to be project-based, including description of each project:  
**PMHA has project-based 102 Housing Choice Vouchers under MTW authority.**

**These projects are:**

**Coleman Professional Services- Several group homes; residents receive mental health services from Coleman Professional Services. Units: 16**



**F&CS- A mixture of duplexes and multi-family (low rise) units; residents receive a variety of supportive service aimed at increases self-sufficiency. Units: 38**

**Prospect House- A high rise building for low-income elderly tenants; residents have access to all supportive services provided by Neighborhood Development Services Inc. Units: 26**

**CEDCorp/Maple Grove- Row houses/townhouses; residents have access to all supportive services provided by Neighborhood Development Services Inc. Units: 10**

**NDS Portage Housing II- Newly constructed tax-credit single-family homes; residents have access to all supportive services provided by Neighborhood Development Services Inc. Units: 2**

**NDS Portage Housing III- Newly constructed tax-credit single-family homes; residents have access to all supportive services provided by Neighborhood Development Services Inc. Units: 10**

General description of other housing managed by the Agency

**Descriptions of other housing owned or managed by PMHA are included below. PMHA also administers housing assistance funds for 172 Moderate Rehabilitation housing program units, and 25 Shelter Plus Care housing program units. As of publication, PMHA intends to submit application to renew the funding for the 25 Shelter Plus Care units and seek to add funding from the Department of Housing and Urban Development for 25 more housing units under the program.**

Description of other properties owned or managed by the Agency:

**PMHA owns several properties, housing and commercial, separate from the Public Housing Program.**

**Housing:**

**Portage Landings: Two 12-unit apartment buildings located at 170 Spaulding Drive and 221 Spaulding Drive in Kent. The properties feature 2 1-bedroom units renting for \$460 per month, 18 2-bedroom units renting for \$560 per month, and 4 3-bedroom units renting for \$650 per month. Renters include both Section 8 Voucher holders and residents paying the market rent amount.**

**616 Virginia Avenue, Kent. This is a single-family home renting for \$589 per month and available to Section 8 or market renters.**

**614 and 614 ½ Virginia Avenue, Kent.** This is a duplex with units leasing for \$567 per month and available to Section 8 or market renters.

#### **Office Property**

**PMHA Administration Building:** Located at 2832 State Route 59, Ravenna, Ohio, this property serves as home for both office-based and maintenance employees and is centrally-located to PMHA properties throughout the county.

#### **Commercial Properties**

**219 and 223 West Main Street, Ravenna.** This property is currently leased to Triangle Pharmacy, a for-profit entity not affiliated with PMHA except through the lease of the property.

**Opportunity Resource Center.** Located at 6592 Cleveland Avenue, Ravenna, this property is used by Maplewood Career Center for adult education activities.

### **Lease Up Information**

#### *Leasing Information-Actual*

Total number of MTW PH units leased in 2009

**PMHA has 303 units that can be used for housing low-income persons. The other two units are leased to Family and Community Services for its PATH program to provide site-based services to residents at Renaissance Place and Community Estates. Off-line units are indicated in the Capital Fund Expenditure Section. These units were temporarily unavailable for leasing during 2009 due to renovations as described above. All units are consider MTW Public Housing units.**

Number of HCV leased in 2009:

**PMHA leased from 1,494 to 1,560 MTW units during any particular month in 2009, with 1,548 units under contract as of December 2009. Funding utilization for any particular month exceeded 100%, peaking at 110% in December 2009.**

**Mainstream (non-MTW) Vouchers leased up from 56 to 71 units per month, with funding utilization ranging from 73-97% of funds allocated. Mainstream participants, as opposed to MTW participants, typically have stable, disability-based incomes as opposed to employment and other less consistent incomes.**

Description of any issues related to leasing units (Public Housing or HCV): **PMHA achieved excellent results in leasing units in 2009, with high occupancy rates and participation rates for the Housing Choice Voucher. It is believed that economic conditions have made landlords more accepting of Housing Choice Vouchers, and tenants and participants both have been more discerning in their housing choices than in the past.**

Number of project-based vouchers committed at the end of the Plan year, and describe project where any new vouchers are placed: **PMHA maintains the 102 project-based Housing Choice Vouchers as described earlier in this report. Due to a variety of factors, most notably a re-alignment of the PBV program following an IG audit, PMHA has suspended issuance of new project-based vouchers. 100+% lease-up rates for HCV has also led to a cessation of new contracts.**

### **Waiting List Information**

*Number and characteristics of households on the waiting lists (all housing types) at the end of the 2009*

The Public Housing waiting list was continuously open during 2009. The most current waiting list includes:

#### **1 bedroom                      432 applicants                      (80 having zero preferences)\***

|                               |                |                     |
|-------------------------------|----------------|---------------------|
| <b>Male</b>                   | <b>182</b>     | <b>42%</b>          |
| <b>Female</b>                 | <b>250</b>     | <b>58%</b>          |
| <b>White</b>                  | <b>289</b>     | <b>67%</b>          |
| <b>Black</b>                  | <b>119</b>     | <b>28%</b>          |
| <b>Hispanic</b>               | <b>2</b>       | <b>Less than 1%</b> |
| <b>American Indian</b>        | <b>7</b>       | <b>2%</b>           |
| <b>Asian</b>                  | <b>1</b>       | <b>Less than 1%</b> |
| <b>Other</b>                  | <b>1</b>       | <b>Less than 1%</b> |
| <b>Did Not Specify</b>        | <b>13</b>      | <b>3%</b>           |
| <b>Disabled (Not Elderly)</b> | <b>119</b>     | <b>28%</b>          |
| <b>Average Income</b>         | <b>\$8,827</b> |                     |

#### **2 bedrooms                      548 applicants                      (125 having zero preferences)**

|                               |                |                     |
|-------------------------------|----------------|---------------------|
| <b>Male</b>                   | <b>74</b>      | <b>14%</b>          |
| <b>Female</b>                 | <b>474</b>     | <b>86%</b>          |
| <b>White</b>                  | <b>366</b>     | <b>67%</b>          |
| <b>Black</b>                  | <b>164</b>     | <b>30%</b>          |
| <b>Hispanic</b>               | <b>0</b>       | <b>0%</b>           |
| <b>American Indian</b>        | <b>2</b>       | <b>Less than 1%</b> |
| <b>Asian</b>                  | <b>0</b>       | <b>0%</b>           |
| <b>Other</b>                  | <b>6</b>       | <b>1%</b>           |
| <b>Did Not Specify</b>        | <b>10</b>      | <b>13%</b>          |
| <b>Disabled (Not Elderly)</b> | <b>70</b>      | <b>28%</b>          |
| <b>Average Income</b>         | <b>\$8,697</b> |                     |

#### **3 bedrooms                      303 applicants                      (98 having zero preferences)**

|                        |            |            |
|------------------------|------------|------------|
| <b>Male</b>            | <b>31</b>  | <b>10%</b> |
| <b>Female</b>          | <b>272</b> | <b>90%</b> |
| <b>White</b>           | <b>177</b> | <b>58%</b> |
| <b>Black</b>           | <b>111</b> | <b>37%</b> |
| <b>Hispanic</b>        | <b>3</b>   | <b>1%</b>  |
| <b>American Indian</b> | <b>2</b>   | <b>1%</b>  |
| <b>Asian</b>           | <b>0</b>   | <b>0%</b>  |

|                               |                 |            |
|-------------------------------|-----------------|------------|
| <i>Other</i>                  | <b>5</b>        | <b>2%</b>  |
| <i>Did Not Specify</i>        | <b>5</b>        | <b>2%</b>  |
| <i>Disabled (Not Elderly)</i> | <b>30</b>       | <b>10%</b> |
| <i>Average Income</i>         | <b>\$10,064</b> |            |

**4 bedrooms                      92 applicants                      (36 having zero preferences)**

|                               |                 |            |
|-------------------------------|-----------------|------------|
| <i>Male</i>                   | <b>11</b>       | <b>12%</b> |
| <i>Female</i>                 | <b>81</b>       | <b>88%</b> |
| <i>White</i>                  | <b>55</b>       | <b>60%</b> |
| <i>Black</i>                  | <b>32</b>       | <b>35%</b> |
| <i>Hispanic</i>               | <b>0</b>        | <b>0%</b>  |
| <i>American Indian</i>        | <b>0</b>        | <b>0%</b>  |
| <i>Asian</i>                  | <b>1</b>        | <b>1%</b>  |
| <i>Other</i>                  | <b>1</b>        | <b>1%</b>  |
| <i>Did Not Specify</i>        | <b>3</b>        | <b>3%</b>  |
| <i>Disabled (Not Elderly)</i> | <b>10</b>       | <b>11%</b> |
| <i>Average Income</i>         | <b>\$13,512</b> |            |

**Note: Zero preference means it is unlikely these applicants will be housed unless there is a change in their status.**

*Description of waiting lists:*

**Discussion of conversion of the Public Housing waiting list from a community-wide housing waiting list to a site-based waiting list determined that it is not advantageous at this time to convert. This is due largely to the economic decline in Portage County that continues. The majority of applicants and residents fall into the category of extremely low-income. The average income as of December 2009 for public housing residents was \$10,625 with 80% of residents having incomes below \$20,000.**

**PMHA closed the Housing Choice Voucher waiting list at the end of March 2009, due to the volume of applications on file.**

**Applications continue to be received solely through the PMHA main administrative office, located at 2832 State Route 59, Ravenna, Ohio. If and when site-based waiting lists are adopted, PMHA will continue to maintain separate waiting lists for each program.**

## Proposed MTW Activities

Describe any activities that were proposed in the Plan, approved by HUD, but not implemented and discuss why these activities were not implemented.

### Housing Choice Voucher Program

**1. PMHA would be permitted to pro-rate utility allowance schedule amounts by as much as the HUD funding pro-ration for the affected program(s).**

***This activity was not implemented for two reasons: The amounts of pro-ration eligibility was considered negligible and thus any decrease in expenses was not needed by the housing authority in comparison to perceived impact on families involved.***

**2. PMHA would accept the income verification results of other governmental agencies performing income verifications within the previous 90 days for the same household.**

***PMHA and the Portage County Department of Job and Family Services began discussions and negotiations on the adoption and implementation of this process during 2009, but had not reached a memorandum of understanding for information sharing to assure access to income data. A system of electronic income verifications has also been discussed as an alternative that may be less burdensome to agency staff.***

### Public Housing Program

**3. PMHA would be permitted to pro-rate utility allowance schedule amounts by as much as the HUD funding pro-ration for the affected program(s).**

***This activity was not implemented for two reasons: The amounts of pro-ration eligibility was considered negligible and thus any decrease in expenses was not needed by the housing authority in comparison to perceived impact on families involved.***

**4. PMHA would accept the income verification results of other governmental agencies performing income verifications within the previous 90 days for the same household.**

***PMHA and the Portage County Department of Job and Family Services began discussions and negotiations on the adoption and implementation of this process during 2009, but had not reached a memorandum of understanding for information sharing to assure access to income data. A system of electronic income verifications has also been discussed as an alternative that may be less burdensome to agency staff.***

**5. PMHA would change the percentage of income used for rent calculations from 30% of adjusted income, to 25-28% of annual income. Eliminate existing income deductions for employment and education activities, unreimbursed childcare expenses. The threshold for non-reimbursed medical expenses would be raised from 3% to 10% of income, dependent deduction will be increased to \$500 per child up to a maximum of \$1,000, the senior/disabled deduction would be increased to \$500 per senior/disabled adult in the household, up to a maximum of \$1,000, and a deduction for an absent child where a household head or co-head is paying child support would be allowed.**

*The above change to rent determination methods was not implemented during 2009, awaiting an upgrade to the Yardi software system used for the calculations. Data to analyze the impact of these changes was being gathered at the end of 2009 to re-assess whether this authority was a desirable policy change in consideration to the changes in local economic conditions. PMHA estimates that these changes would be completed during 2010 for new households to PMHA programs, and a phase-in implemented for households receiving assistance under the old calculations. Although approved individually by HUD, the activities are elements of a comprehensive rent reform package, interdependent upon each other. Any one particular element may be ready for immediate implementation, but would affect the later implementation of other elements, and as a result are grouped here.*

#### Single Fund Budget Flexibility

**6. PMHA would use a Single Fund Budget system with full flexibility using Public Housing Operating Subsidy, Capital Fund and Housing Choice Voucher subsidy for Moving to Work Activities**

*PMHA did not determine to use funds outside of traditionally awarded categories for Moving to Work activities, as management deemed each source adequate for the MTW activities planned and implemented.*

**Ongoing MTW Activities: HUD Approval Previously Granted**

Housing Choice Voucher Program

- **Initial Rent Burden Cap of 50% of adjusted monthly income. PMHA will allow HCV participants to utilize an initial rent burden of 50% to maximize housing choice will maintaining a level of affordability. Plan Year: 1999. Implemented: 2000.**

**Impacts**

| <b>Statutory Objective</b>                       | <b>Anticipated Impacts</b>  | <b>Metric</b>             | <b>Baseline</b>  | <b>Benchmark</b>  | <b>Outcome</b>  |
|--|---|---------------------------|--|---|---|
| Increase housing choices for low-income families | Expand housing choice by allowing participants to devote a greater percentage of AMI towards housing costs and allows participants to lease units in geographic areas that provide more opportunities and expand the housing choices. | Newly admitted households | In 2008, 64 (20%) of 326 households starting new tenancies began their tenancy with initial rent burdens at 41-50% of AMI. | Increase in the number of households with an initial rent burden in the range of 41-50% of AMI. | In 2009, 86 (28%) of the 304 households beginning new tenancies had initial rent burdens in the 41-50% AMI range, an increase of 22 households over 2008. |

**The anticipated impact of this activity is to broaden housing choice by allowing participants to choose to devote a greater percentage of income towards housing than is ordinarily permitted under the program. During 2009, PMHA had 304 new MTW Voucher admissions, and 86 of these new tenancies had initial rent burdens that feel in the range of 41-50% of adjusted monthly income range. No requests for hardship were made during the 2009 year, and no participants were terminated for failure to pay rent in the group of participating households utilizing the feature. As result, all participating families wound up renting housing that otherwise would be ineligible for their occupancy.**

**The original benchmark was inadequately stated, in simply citing that the baseline will be the new tenancies that fall in the 41-50% income range, without establishing a goal number of households that utilize the feature. In hindsight, this feature does not offer itself well to a goal or benchmark for utilization, other than the possible measurement of how many families encounter rent difficulties due to**



the extended and higher amount of rent burden. PMHA does not aspire to have a large number of families utilizing the feature. The data collection methodology and collection proved adequate for the measures created.

Authorization(s)

**Rent Policies and Term Limits**

**Attachment C, Part D, Section 2.a** This authorization waives certain provisions of Sections 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24 C.F.R. 982.508, 982.503 and 982.518, as necessary to Implement the Agency’s Annual MTW Plan.

- **Exclusion of overtime, bonuses and income from bank assets. PMHA excluded interest income from bank assets such as checking and savings accounts and certificates of deposit. Plan year: 1999. Implemented: 2000.**

**Impacts**

| <b>Statutory Objective</b> | <b>Anticipated Impacts</b>  | <b>Metric</b>  | <b>Baseline</b>   | <b>Benchmark</b>                                  | <b>Outcome</b>  |
|----------------------------|---|--|---|---|---|
| Increase Self Sufficiency  | Promote asset accumulation; increase the number of households that accumulate bank assets | Households reporting bank assets or overtime and bonuses | In 2008, 121 households reported bank assets and one household reported a bonus | Projected increase in households with bank assets | 694 households reported bank assets and one household reported a bonus in 2009. |

**The anticipated impact of this feature is to promote asset accumulation by participants by reducing the “income” penalty of an assigned or actual interest on those accounts. In the past, households would be expected to use that interest to pay for housing costs. In addition, this feature is expected to reduce administrative burden on the housing authority by eliminating the need to gather verification data on these accounts, as well as making adjustments to income based on temporary or one-time income activities such as overtime or bonuses.**

**With no rent consequence to reporting, PMHA speculates this may be a more accurate number than would be achieved without the policy, as there is no incentive to hide these assets. Likewise, PMHA did not collect information on overtime, but did record one household whose bonus did not impact their rent share based on the policy.**

**As with the activity above, the benchmarks and baseline data initially developed in the 2009 plan was inadequately stated, and attempted**

to account for the fact that original data from 1999 was unavailable and virtually impossible to recapture. Since this was ongoing activity from previous years, a comparison of 2009 data to 2008 data would not necessarily demonstrate the impact of the activity, but rather a change in local economic conditions and reporting and data collection methods employed by the housing authority

Authorization(s)-From Attachment C:

**Rent Policies and Term Limits**

**Attachment C, Part D, Section 2.a** This authorization waives certain provisions of Sections 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24 C.F.R. 982.508, 982.503 and 982.518, as necessary to Implement the Agency’s Annual MTW Plan.

- **MTW Homeownership Program: PMHA will continue to expand the MTW homeownership program, which identifies families with homeownership as one of their goals, screens the family for eligibility and applies a homeownership assistance payment to participants who purchase a home under the program. Plan Year: 1999. Implementation: 2000**

**Impacts:**

| <b>Statutory Objective</b>                       | <b>Anticipated Impacts</b>  | <b>Metric</b>   | <b>Baseline</b>   | <b>Benchmark</b>  | <b>Outcome</b>   |
|--|---|---|---|---|--|
| Increase housing choices for low-income families | Increase in the number of low-income families owning homes and receiving supportive services aimed at helping families move from renting to home ownership. | Households participating in various aspects of the homeownership program and households who purchased homes under the program | In 2008, 2 families purchased homes and 13 participated in various pre-purchase activities. | Projected that 5 households would purchase homes in 2009. | In 2009, 4 households became homeowners and 10 families were participating in pre-purchase activities. |

**PMHA’s MTW Homeownership Program assists families become homeowners using the subsidy available through HCV funding. PMHA had four households become homeowners from the its pool of rent-assisted families during 2009. PMHA anticipated five households would become homeowners during the year.**

**The major challenge that cause PMHA to fall short of the goal of five new homeowners in 2009 was the shortage of lender financing due**

to the housing, credit and banking crises experienced during the year. Lower housing prices did help offset this challenge and assist in having 4 families be successful, however.

Historically, the PMHA has had the following results for MTW Homeownership:

| Year         | Closings  | Total Homeowners | Defaults |
|--------------|-----------|------------------|----------|
| 2001         | 1         | 1                | 0        |
| 2002         | 9         | 10               | 0        |
| 2003         | 4         | 14               | 0        |
| 2004         | 4         | 18               | 0        |
| 2005         | 6         | 24               | 0        |
| 2006         | 5         | 29               | 1        |
| 2007         | 6         | 34               | 0        |
| 2008         | 2         | 36               | 0        |
| 2009         | 4         | 40               | 0        |
| <b>Total</b> | <b>41</b> | <b>40</b>        | <b>1</b> |

Authorization(s)

**Homeownership Program**

Attachment C, Part D, Section 8 This authorization waives certain provisions of Section 8(o)(15) and 8(y) of the 1937 Act and 24 C.F.R. 982.625 through 982.643 inclusive as necessary to implement the Agency’s Annual MTW Plan. In reviewing the program and current homeownership requirements established by HUD, the new homeownership program probably does not need MTW authorization to operate. The slight provisions under MTW could be met through creative use of preferences to maintain the program for Public Housing residents who wish to become homeowners. However, PMHA has proposed for 2010 a substantial change to its MTW Homeownership Program which would permit assistance to potential foreclosure households. Such a use requires MTW waivers to be permitted.

- **MTW Project-Based Voucher Program:** PMHA uses a number of waivers from the original and current HCV guidelines to assist developers to build or rehabilitate properties for the use of homeless, disabled or other families in need of supportive services.

**Impacts**

The MTW Project-Based Voucher Program provided a project-based Housing Choice Voucher subsidy to 104 units during 2009, although

2 units were removed during the year due to inactivity (extended vacancy by the owner). As of December 2009, 84 units were occupied out of 102, with turnover activity going on to fill vacant units. No new units were added to the program in 2009 by any developers.

The PBV program was essentially maintained at the status quo, except that new policies were established to allow PMHA to resolve findings made by the HUD Inspector General. Other than contract renewals for existing projects, PMHA had no intent to add units to the program until all issues were resolved. By year end, the utilization rate of tenant-based HCV allowed for no new projects to be permitted for the foreseeable future.

Historically, the MTW Project-Based Voucher Program has seen the following activity:

| Year | Number of Units | Added | Removed |
|------|-----------------|-------|---------|
| 2002 | 9               | 10    | 1       |
| 2003 | 31              | 22    | 0       |
| 2004 | 93              | 62    | 0       |
| 2005 | 121             | 30    | 2       |
| 2006 | 112             | 12    | 21      |
| 2007 | 114             | 6     | 4       |
| 2008 | 106             | 10    | 18      |
| 2009 | 102             | 0     | 4       |

Authorization(s)

**Establishment of an Agency MTW Section 8 Project-Based Program Attachment C, Part D, Section 7 This authorization waives certain provisions of Section 8(o)(15) and 8(y) of the 1937 Act and 24 C.F.R. 982.625 through 982.643 inclusive as necessary to implement the Agency's Annual MTW Plan.**

- Cap on dependent child deduction**  
 PMHA will continue to give a \$480 allowance for each family member (other than the head or spouse), who is disabled or a minor, and for family members who are 18 and older who are full-time students or who are disabled. This allowance is not to exceed \$960, except that current residents (as of April 23, 1999) are entitled to an allowance of \$480 for each family member who is a minor and for family members who were 18 and older and full-time students or who are disabled as of June 1, 2000. Plan Year: 1999 Implemented: 2000

Impacts:

| <b>Statutory Objective</b>  | <b>Anticipated Impacts</b>  | <b>Metric</b>            | <b>Baseline</b>  | <b>Benchmark</b>                        | <b>Outcome</b>   |
|---|---|--------------------------|--|---|--|
| Reduce costs and achieve greater cost effectiveness in federal expenditures | HAP expenditures associated with households with three or more dependents will be reduced | HAP savings/expenditures | In 2008, there were 90 families with 3 or more dependents. A total of \$63,840 in annual income that would have been excluded was included in the determination of annual income. A HAP savings of \$1,532 was realized as a result. | Projected reduction in HAP expenditures | In 2009, there were 207 households with three or more minors. A total of \$148,800 in annual income that would have been excluded was now included in the determination of annual income. A HAP savings of \$3,572 was realized. |

The anticipated result when requested in 1999 was to align subsidized housing with market housing, in that families that add to their family size do not receive economic benefits to their household, and thus promote family decision-making that took into account the costs of additional children. Additionally, PMHA expected to lower HAP costs as a result of this provision. During 2009, PMHA had 207 households with three or more dependents. The amount of income that was not excluded due to the deduction was \$148,800 during 2009. PMHA does not have measurement on what impacts this policy may have made on family size and choices to add children to the households, and the provision did allow for families to receive larger voucher sizes if the family would become under-housed. PMHA has not tracked this activity by year.

Authorization(s)

**Rent Policies and Term Limits**

**Attachment C, Part D, Section 2.a** This authorization waives certain provisions of Sections 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24 C.F.R. 982.508, 982.503 and 982.518, as necessary to Implement the Agency’s Annual MTW Plan. Only under MTW authorization is the activity permitted, but a change in administration and pending changes through rent reform are expected to lead to an end to this activity in 2010.

- **Employment and education deductions**  
PMHA will continue to give \$500 deductions from annual income where the head of household or spouse is employed 33 hours or

more in the same position or is registered as a full-time student at an educational institution, as defined by the standards of the institution, and maintaining a minimum of a 2.0 grade point average. Plan Year: 1999 Implementation: 2000.

**Impacts:**

| <b>Statutory Objective</b> | <b>Anticipated Impacts</b>   | <b>Metric</b>  | <b>Baseline</b>  | <b>Benchmark</b>   | <b>Outcome</b>   |
|----------------------------|--|--|--|--|--|
| Increase Self Sufficiency  | Increase in the number of participants who obtain/maintain full-time employment or increase employment income as well as by the number of participants who are enrolled in formal educational institutions | Households with Head of Household who are employed or attending school full-time | In 2008, 52 households had HOH employed full-time and 16 households with HOH who were full-time students and qualified for the deduction | Projected increase in families with HOH employed full-time or full-time students | In 2009, 209 families were given the employment deduction and 73 received the education deduction. |

**PMHA had 209 families given the employment deduction for full-time employment in 2009, and 73 families were provided with the education deduction based upon full-time status.**

Authorization(s):

**Rent Policies and Term Limits**

**Attachment C, Part D, Section 2.a** This authorization waives certain provisions of Sections 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24 C.F.R. 982.508, 982.503 and 982.518, as necessary to implement the Agency’s Annual MTW Plan. PMHA expects that the deductions offered could be provided within the discretionary rent policies available to any housing authority, and will seek to eliminate these features in exchange for lower percentage of income rates for employment.

Public Housing Program

- **PMHA will operate a group home for disabled persons as Public Housing, with each bedroom considered as a housing unit for the purposes of household determination, rent calculation, operating**

subsidy and Capital Fund unit count determinations; each housing unit will house one household/family for purposes of data submission to PIC and PHAS inspection protocols will continue as previously established and applied by HUD. Plan Year: 2009 Implemented: 2009.

**Impacts**

*PMHA anticipated this authorization would maintain the 8 Public Housing Units for disabled persons at Washington Group Home, as it was constructed over 20 years ago. The request for authorization of this use became necessary as discussion at HUD suggested that group home activity as originally approved by HUD when the home was built, was no longer permitted by HUD. In essence, this activity was intended to protect the housing of eight disabled individuals from being lost due to changing HUD mandates.*

*Washington Group Home remained fully occupied as a group home for persons with disabilities during 2009, and achieved the desired benchmarks for occupancy. The home had an initial baseline of 8 residents, since it was fully occupied at the beginning of the year as a group home, and remained so throughout 2009. PMHA anticipates maintaining this occupancy as a benchmark moving forward, as it experiences minimal and infrequent turnover during any particular year. The residents are disabled and require personal and other services to simply remain in the group home, and rarely choose to move elsewhere.*

- **Minimum Rent of \$25 that will increase by \$25 every two years during tenure in Public Housing, and will be capped not to exceed \$250 per month, which would be attained after 18 years of Public Housing residency. Households with a head or co-head of household, or spouse who is elderly (62 years of age or older, and/or disabled) will have no minimum rent. Departure or death of the sole elderly or disabled household member will result in the minimum rent requirement being re-instated for remaining household members. Plan Year: 2008 Implemented: April 2008**

| <b>Statutory Objective</b> | <b>Anticipated Impacts</b> | <b>Metric</b> | <b>Baseline</b>        | <b>Benchmark</b>             | <b>Outcome</b>                |
|----------------------------|----------------------------|---------------|------------------------|------------------------------|-------------------------------|
| Increase Self Sufficiency  | Increase rent revenue      | Rent Revenue  | 2008 Revenue \$461,335 | Increase of \$50,000 per yr. | 2009 Actual Revenue \$522,433 |

**Anticipated Impact**

Provides incentive to maintaining employment or other income-producing activities, as well as allowing program participants greater choice in their continuing participation than a time limit feature, which would arbitrarily end the housing assistance regardless of the household's efforts or progress toward self-sufficiency

**Actual Impact**

Because PMHA developments are rather small, a change for 1 or 2 residents could impact percentages drastically. Table I (below) illustrates changes in wage income for family units for 2008 and 2009.

A comparative analysis of income for family units between 2008 and March 2009 follows:

**Table I  
Public Housing Family Units  
Income Data for 2008 and 2009**

| <b>West Side</b>                   | <b>Average<br/>Income<br/>2008<br/>(All<br/>sources)</b> | <b>Average<br/>Income<br/>2009<br/>(All<br/>sources)</b> | <b>Percentage<br/>with Wage<br/>Income 2008</b> | <b>Percentage<br/>with Wage<br/>Income 2009</b> |
|------------------------------------|--|--|---|---|
| Town Square<br>(30 units)<br>3105  | \$11,638   | \$8,531  | 68%   | 40%   |
| Athena<br>(25 units)<br>3101a      | \$11,444   | \$13,050   | 48%   | 68%   |
| Heritage<br>(30 units)<br>3109     | \$11,249   | \$10,531   | 55%   | 47%   |
| Scattered-W<br>(8 units)<br>3102w  | \$11,423   | \$13,685   | 63%   | 71%   |
|                                    |  |  |   |   |
| <b>East Side</b>                   | <b>Average<br/>Income<br/>2008</b>                       | <b>Average<br/>Income<br/>2009</b>                       | <b>Percentage<br/>with Wage<br/>Income 2008</b> | <b>Percentage<br/>with Wage<br/>Income 2009</b> |
| Community E<br>(27 units)<br>3101f | \$9,922  | \$13,050   | 48%   | 41%   |
| Harvest Dr.<br>(28 units)<br>3103  | \$8,602  | \$8,531  | 46%   | 44%   |
| Single Family                      | \$18,887   | \$19,983   | 90%   | 80%   |



|   |          |           |            |            |
|---|----------|-----------|------------|------------|
| (10 units)<br>3110                        |          |           |            |            |
| Renaissance<br>(32 units)<br>3115         | \$8,689  | \$6,112   | 41%        | 34%        |
| Scattered 15<br>(5 units) 3115            | \$25,113 | \$23,602  | 60%        | 75%        |
| Scattered-E<br>(14 units)<br>3102e        | \$8,519* | \$13,685* | 43%*       | 49%*       |
| <b>Percent of Family Units with WAGES</b> |          |           | <b>53%</b> | <b>49%</b> |
| *Omits Walnut House Residents             |          |           |            |            |

It isn't possible to measure to what extent minimum rent serves as an "incentive" to maintaining employment or other income-producing activities with current data on hand. Outside influences such as the economy in Portage County impact the ability to obtain and maintain employment. During 2010 Resident Meetings, minimum rent will be an agenda item, and hopefully, dialogue will provide information relating to minimum rent's "incentive".

#### **Anticipated Impact**

**Provides increased rent revenue**

#### **Actual Impact**

**Rent revenue in 2008 was \$461,335 and \$522,433 in 2009. An increase of \$61,098 was realized.**

If benchmarks were not achieved or if the activity was determined ineffective, provide a narrative explanation of the challenges, and if possible, identify potential new strategies that might be more effective.

**Minimum Rent achieved its benchmark of increased rent revenue. Data relating to Minimum Rent serving as an "incentive" to maintain employment or other income-producing activities needs to be strengthened. New strategy is to add Minimum Rent as an agenda item during 2010 Resident Meetings to encourage dialogue as Minimum Rent being an "incentive" to maintain employment or other income-producing activities. Meeting minutes would serve as the vehicle data collection. Additionally, on-going tracking of the economic climate of Portage County will need to continue to gauge unemployment rate, job openings and pay rates. During the most recent Resident Meeting, one resident stated that in today's economic climate, it is not up to the resident if employment is maintained because of so many layoffs. No hardship requests were made.**

If benchmarks or metrics have been revised; identify any new indicator(s) of activities status and impact

**There are no changes.**

If data collection methodology has changed, describe original data collection methodology and any revisions to the process or change in data collected

**The original data collection methodology includes:**

- **Family Review Reports produced by YARDI on a monthly basis**
- **Data will be maintained in an Excel Folder**

**The original data collection of reviewing resident demographics specifically relating to employment income as detailed in Resident Statistical Reports will still be used for comparative analysis of increase/decrease in the percentage of families with wage income or the percentage engaged in other income-producing activities.**

**Minutes from Resident Meetings will also be used to determine the impact of Minimum Rent on maintaining employment... A resident survey will also be used to determine to what extent this feature is an incentive to maintaining employment.**

**Also, economic factors, such as unemployment rate etc., in Portage County will be used to assess job opportunities for residents.**

Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity

**Section 3(a)(2), 3(a)(3)(A) and Section 6(1) of the 1937 Act and 24 CFR 5.603, 5.611, 5.628, 5.630, 5.632, 5.632 and 960.255 and 966 Subpart A as necessary to implement the 2009 PMHA Annual MTW Plan. The significant portion of this MTW authorization is expected to be demonstrated in 2012, at which point a waiver under existing rules would be necessary. Current minimum rents established by PMHA have not exceeded the \$50 maximum established nationally, but are anticipated to do so in future years. This escalating minimum rent feature is implemented as an alternative to arbitrary time limits.**

- **Maximum Rent**  
**Maximum Rent allows for rents set at less than 30% of adjusted income. Maximum rents are \$450 per month for 1 and 2 bedroom units, and \$475 per month for 3 and 4 bedroom units, regardless of**

**income. Households are permitted to reside in public housing for as many as 5 years at these amounts, before having their maximum rent increase to 90% of the HUD Fair Market Rents. (There is no time limit for this higher maximum rent level). Income re-verifications will be biennially for these households. Elderly or disabled households will have no time limit for the ceiling rents. Plan Year: 2008 Implemented: April 2008**

| <b>Statutory Objective</b> | <b>Anticipated Impacts</b>                | <b>Metric</b>       | <b>Baseline</b>  | <b>Benchmark</b>   | <b>Outcome</b>  |
|----------------------------|---|---------------------|--|--|---|
| Increase Self Sufficiency  | Incentives to Maintain Employment         | Households          | 2008 Number of Households maintaining maximum rent 34 (11%)        | Projected 2009 Number of Households maintaining maximum rent 35        | 2009 Actual Number of Households maintaining maximum rent 36 (12%)        |
|                            | Incentives to Maintain Employment         | Households          | 2008 Maximum Rent Households experiencing a rent reduction 4 (12%) | Projected 2009 Maximum Rent Households experiencing a rent reduction 5 | 2009 Actual Maximum Rent Households experiencing a rent reduction 7 (19%) |
|                            | Incentives to Maintain Employment         | Households          | 2008 Maximum Rent Households moved from public housing 1 (3%)      | Projected 2009 Maximum Rent Households moving from public housing 7    | 2009 Actual Maximum Rent Households moved from public housing 9 (25%)     |
| Housing Choice             | Encourage Stability at PH Developments    | Households          | 2008 Maximum Rent HH moved 3 vs. All public housing moves 66       | Projected 2009 Maximum Rent HH moves 5                                 | 2009 Actual Maximum Rent HH moves 5 vs. All public housing moves 68       |
| Cost Effectiveness         | Less staff time used to re-certify income | Staff Time and Cost | 2008 Savings Time=102 hrs Cost=\$1,340                             | Projected 2009 Savings Time=105 hrs Cost=\$1,380                       | Actual 2009 Savings Time=108 hrs Cost=\$1,418                             |

**Anticipated Impact**

**Provides incentive to maintaining employment or other income-producing activities, as well as allowing program participants greater choice in their continuing participation than a time limit feature, which would arbitrarily end the housing assistance regardless of the household's efforts or progress toward self-sufficiency.**

**Actual Impact**

April 2008 data indicates that 20 households were at Maximum Rent. Of these households, 12 remained at Maximum Rent as of April 2009, and 9 remained at Maximum Rent as of March 2010. Between April 2008 and March 2010, 6 of these households left public housing, and 5 experienced an income decrease, which warranted a rent adjustment below Maximum Rent levels.

April 2009 data indicates that 27 households were at Maximum Rent. Of these households, 17 remained at Maximum Rent as of March 2010. Between April 2009 and March 2010, 5 of these households left public housing and 5 experienced an income decrease, which warranted a rent adjustment below Maximum Rent levels.

**Anticipated Impact**

Provides increased rent revenue, in the sense that, families with higher incomes leaving public housing are typically replaced with extremely low-income families

**Actual Impact**

An increase of \$61,098 was realized in 2009 when compared to 2008 rent revenue. Applicants for public housing are overwhelmingly (90% or greater) extremely low-income. Extremely low-income residents replace families leaving public housing, since the average annual income for applicants is under \$11,000.

**Anticipated Impact**

Encourages stability at public housing developments resulting in less vacancy and unit turnover costs

**Actual Impact**

In 2008, 3 or 15% of the 20 households at ceiling rent moved from public housing and 66 or 22% of all residents left public housing.

In 2009, 5 or 19% of the 27 households at ceiling rent moved from public housing and 68 or 23% of all residents left public housing.

Thus, there is a lower percentage of residents at ceiling rent leaving public housing when compared to all resident moves.

If benchmarks were not achieved or if the activity was determined ineffective, provide a narrative explanation of the challenges, and if possible, identify potential new strategies that might be more effective.

**Overall, benchmarks are being met.**

If benchmarks or metrics have been revised; identify any new indicator(s) of activities status and impact

**The two areas of weakness are documenting the level to which the "incentive" to maintaining employment for those who are at ceiling rent is relative, and documenting the extent that ceiling rent "encourages savings" to be used as a down payment for a home. These benchmarks will be documented through inclusion of agenda items during 2010 Resident Meetings and through survey of residents at ceiling rent, also during 2010.**

If data collection methodology has changed, describe original data collection methodology and any revisions to the process or change in data collected

**The original data collection methodology includes:**

- **Family Review Reports produced by YARDI on a monthly basis**
- **Re-Certification Reports from YARDI**
- **PMHA monthly Financial Reports by Development**
- **Resident Exit Interviews (states reason for leaving public housing)**
- **Weekly vacancy/unit turnover reports**

Revisions to the Process or Change in Data Collected include:

- **Dropping the Resident Exit Interviews, because residents typically do not take the time to complete them. As a result, information collected is inadequate to determine why households leave public housing.**
- **Resident Surveys and dialogue during resident meetings will be included as data collection tools.**

Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity.

**Rent Policies and Term Limits-**

***Section 3(a)(2), 3(a)(3)(A) and Section 6(1) of the 1937 Act and 24 CFR 5.603, 5.611, 5.628, 5.630, 5.632, 5.632 and 960.255 and 966 Subpart A as necessary to implement the Agency's Annual MTW Plan.***

**Initial, Annual and Interim Income Review Process**

***Sections 3 (a)(1) and 3 (a)(2) of the 1937 Act and 24 CFR 966.4 and 960.257***

**PMHA benefits by establishing a lower maximum or ceiling rent as an alternative to percentage based rents. A market rate maximum rent was used in the past and found inadequate to retain residents in public housing for longer, but not lifetime, periods in order to provide community stability and accumulate assets.**

- Maintain existing supportive services arrangements with partners as well as increase the numbers of partners**  
**Existing supportive services arrangements with local non-profits will be maintained as the PMHA seeks new grants when available that can support self-sufficiency efforts. PMHA is also seeking to simplify rent determination policies to enable staff to spend more time with self-sufficiency topics and referrals to the Portage Workforce Connection. PMHA goals: Increase the number of partners providing supportive services to residents and participants. Plan Year: 2008 Implementation: 2008**

| <b>Statutory Objective</b> | <b>Anticipated Impacts</b>                      | <b>Metric</b>  | <b>Baseline</b>                      | <b>Benchmark</b>       | <b>Outcome</b>                      |
|----------------------------|---|--|--------------------------------------|------------------------|-------------------------------------|
| Increase Self Sufficiency  | Impact #1<br>Increase Employment among Families | Number of Families with wage income                                    | 2008 Number of Families<br>114 (53%) | 2009 Projection<br>100 | 2009 Actual Number<br>101 (49%)     |
|                            | Impact #2<br>Increase Employment among Families | Number of Existing Partners providing supportive services to Residents | 2008 Number of Partners<br>4         | 2009 Projection<br>1   | 2009 Actual Number of Partners<br>4 |

**Anticipated Impact**

**65% of households will report employment in five years**

**Actual Impact**

**53% of Family Units had wage income in 2008 compared to 49% in 2009. Unemployment rate for Portage County is 10.7%. When comparing the distribution of wage income for family units among 10 developments, between 2008 and 2009, 6 or 60% of developments experienced a percentage decline among families, while 4 or 40% of developments experienced a percentage increase among families with wage income.**

**In 2008, 2 developments (40 families) had over 65% of households with wage income compared to 4 developments (48 families) having over 65% of households with wage income in 2009. However, the**

ultimate goal is to have 137 families with wage income. The 137 total does not include residents at Eastowne, Etna House, Washington Group Home, Walnut House or Willow Street, which are projects for senior citizens and persons with disabilities

#### **Anticipated Impact**

The number of PMHA partners will increase

#### **Actual Impact**

The number of PMHA partners has increased. With the implementation of the Neighborhood Network Program, one important partner is the Community Action Council of Portage County, which supplies Resident Coordinators to serve as Interns for this program. The Resident Coordinators/Interns are selected from the CAC computer technology program, and serve as computer technicians to this program.

The Director also is working with Portage Regional Planning to promote Section 3 job opportunities for low-income persons, including public housing residents. PMHA is also now working with Aura Housing in an effort to develop permanent supportive housing for homeless young adults and those exiting foster care.

If benchmarks were not achieved or if the activity was determined ineffective, provide a narrative explanation of the challenges, and if possible, identify potential new strategies that might be more effective.

**Benchmarks were achieved, in that PMHA maintained major existing relationships with Family and Community Services, Coleman Professional Services, CAC of Portage County, Independence Inc. as described in the goal of maintaining existing supportive services. Additionally, PMHA has added new relationships with two agencies in Portage County.**

If benchmarks or metrics have been revised; identify any new indicator(s) of activities status and impact

**No revisions or new indicator(s). PMHA is under consideration in how this aspect of program operation should be factored into Moving to Work assessment. Some partnerships pre-date Moving to Work participation and would continue to exist without MTW authority; others, most notably the homeless and transitional housing programs for Portage County, exist because the unique combination of MTW permissions and funding connected to other non-profits have been combined to make a more supportive arrangement for housing and services. Simply put, PMHA could and would have partnerships without Moving to Work.**

If data collection methodology has changed, describe original data collection methodology and any revisions to the process or change in data collected

**Current methodology includes:**

- **Family Review Reports produced by YARDI on a monthly basis**
- **Data will be maintained in an Excel Folder**
- **Listing of Partners will be up-dated every six months**

Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity.

**Partnerships with For-Profit and Non-Profit Entities-No change**

**This authorization waives certain provisions of Sections 13 and 35 of the 1937 Act and 24 CFR 941 Subpart F as necessary to implement the 2009 PMHA Annual MTW Plan. Clearly, partnerships are achievable without MTW authorization, but the various authorizations in general has allowed PMHA to develop and operated transitional housing, employment programs, homeless shelter and offer office space for supportive services in Public Housing without cost of subsidy to the agency.**

- **Providing transitional housing**  
Up to 42 units of transitional housing will be set aside for previously homeless families at Renaissance Place and Community Estates. Through partnership with Family and Community Services and its Portage Area Transitional Housing (PATH) program, residents receive on-site intensified case management services as they move toward self-sufficiency. Plan Year: 1999 Implemented: 1999

| <b>Statutory Objective</b> | <b>Anticipated Impacts</b>   | <b>Metric</b>                                    | <b>Baseline</b>   | <b>Benchmark</b>   | <b>Outcome</b>  |
|----------------------------|--|--|---|--|---|
| Housing Choice             | Impact #1<br>Homeless Families<br>Housed                                 | Number of Homeless Families<br>Housed            | 2008 Number of Homeless Families Housed<br>55               | 2009 Projection of Homeless Families Housed<br>Minimum of 42             | 2009 Actual Number of Homeless Families Housed<br>57                        |
| Self-Sufficiency           | Impact #2<br>On-Site Supportive Services Provided to previously homeless | Number of Families receiving supportive services | 2008 Number of Families receiving supportive services<br>55 | 2009 Projection of Homeless Families receiving supportive services<br>42 | 2009 Actual Number of Homeless Families receiving supportive services<br>57 |



|                                   |   |   |  |   |  |
|-----------------------------------|---|---|--|---|--|
|                                   | families  |   |  |   |  |
| Housing Choice & Self-sufficiency | Impact #3 Homeless Families complete Transitional Housing Program | Number of Homeless Families completing Transitional Housing Program | 2008 Number of Homeless Families completing Transitional Housing Program 8 | 2009 Projection of Homeless Families completing Transitional Housing Program 10 | 2009 Actual Number of Homeless Families completing Transitional Housing Program 11 |

**Anticipated Impact**

**Provides most vulnerable residents of Portage County with the basic need for housing**

**Actual Impact**

**Impact is realized. Transitional Housing program houses previously homeless families. 45% of Renaissance Place residents have annual incomes under \$5,000, and 76% have incomes under \$10,000. Average income was \$6,112. 37% of Community Estates families have annual incomes under \$5,000, and 70% of families have incomes under \$10,000.**

**Anticipated Impact**

**Provides previously homeless families with on-site supportive services which emphasizes goal-setting and an establishment of a case plan for self-sufficiency**

**Actual Impact**

**On-site supportive services are provide to transitional housing program participants by Family and Community Services-Portage Area Transitional Housing Program (PATH).**

If benchmarks were not achieved or if the activity was determined ineffective, provide a narrative explanation of the challenges, and if possible, identify potential new strategies that might be more effective.

**Benchmarks were achieved, in that all families participating in the 42 units of transitional housing are formerly homeless persons/families who qualify for supportive services funded by HUD Continuum of Care grant funds. All families are entitled to participate in on-site supportive services and establish case plans for self-sufficiency. PMHA is seeking information from its supportive services partner that will provide additional data on the progress of families in attaining self sufficiency.**

If benchmarks or metrics have been revised; identify any new indicator(s) of activities status and impact

**No revisions or new indicator(s)**

If data collection methodology has changed, describe original data collection methodology and any revisions to the process or change in data collected

**Current methodology includes:**

- **Family Review Reports produced by YARDI on a monthly basis**
- **Data will be maintained in an Excel Folder**

**No changes proposed to the data collection methodology**

Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity.

**Transitional/Conditional Housing Program**

**This authorization waives certain provisions of Sections 3,4,5,8, and 9 of the 1937 Act and 24 CFR 941, and 960 Subpart B as necessary to implement the 2009 PMHA Annual MTW Plan. MTW authorization is critical to this activity. In 1998, the supportive services funding was not renewed, and the MTW authorization provided the grounds for Congressional action to re-establish funding after evaluators deemed the funding ineligible because transitional housing is not allowed in Public Housing.**

- **Assets/Interest Income**  
**Neither Assets nor Interest is considered in the income calculation for the purposes of calculating rent. Plan Year: 1999 Implemented: 1999**

| <b>Statutory Objective</b> | <b>Anticipated Impacts</b> | <b>Metric</b>                    | <b>Baseline</b>   | <b>Benchmark</b>  | <b>Outcome</b>                              |
|----------------------------|----------------------------|----------------------------------|---|---|---|
| Increase Self Sufficiency  | Promote Asset Accumulation | Number of Households with Assets | 2008 Number of Households<br>70                             | 2009 Projection<br>90                                       | 2009 Actual Number<br>96                    |
| Increase Self Sufficiency  | Promote Asset Accumulation | 2008 Dollar Amount               | \$108,536   | Projected Increase<br>\$30,000                              | Actual increase in Dollar Amt.<br>\$167,545 |
|                            |                            |                                  | 2008 Avg. Asset Value:<br>\$1,551<br>Median Value:<br>\$100 | 2009 Avg. Asset Value:<br>\$2,876<br>Median Value:<br>\$100 |   |

|                    |   |                             |  |  |  |
|--------------------|---|-----------------------------|--|--|--|
| Cost Effectiveness | Less staff time used to verify income from assets | Staff time and cost savings | 2008 Staff time saved: 70 hours<br>Cost savings: \$910 | 2009 Projections<br>Hours saved: 80<br>Cost Savings: \$1,040 | 2009 Actual<br>Staff time saved: 96 hours<br>Cost Savings: \$1,248 |
|--------------------|---|-----------------------------|--|--|--|

**Anticipated Impact**

**Reduces Administrative Burden of having to calculate and verify asset/interest income, which in most cases has minimal, if any, impact on rent amount**

**Actual Impact**

**The rent calculation process is shortened, thus, administrative burden is reduced. In 2009, this feature saved \$1,248 worth of staff time, allowing employees to perform more case and property management activities instead of asset verification.**

**Anticipated Impact**

**Property Managers will have additional time to devote to tenant issues, which decrease terminations**

**Actual Impact**

**Terminations numbered 16 in 2008 and 9 in 2009. Additional time was devoted to tenant issues, mainly working with families at a greater intensity to save their housing. For example, housekeeping education program was developed and implemented during 2009.**

**Anticipated Impact**

**Low-income families that have asset/interest income are more likely to apply for public housing, thus increasing their housing choices**

**Actual Impact**

**This impact of this feature is unable to be measured. The PMHA does not advertise that asset/interest income is waived, thus, the degree to which this feature serves as a motivator for low-income persons to apply for public housing is unknown. Also, overwhelmingly, applicants have extremely low income and no asset/interest income.**

If benchmarks were not achieved or if the activity was determined ineffective, provide a narrative explanation of the challenges, and if possible, identify potential new strategies that might be more effective.

**Reduction in staff time spent on rent calculation is decreased. Property Managers have devoted more time in 2009 to tenant issues. Terminations have decreased and Housekeeping Education has been increasingly provided to families during 2009 as one effort to reduce terminations. As far as this feature's impact on applicants, data is not available for evaluation.**

If benchmarks or metrics have been revised; identify any new indicator(s) of activities status and impact

**The anticipated impact that: "Low-income families that have asset/interest income are more likely to apply for public housing, thus increasing their housing choices" is difficult to assess. Thus, the measurement of this anticipated impact has to be rethought during 2010.**

If data collection methodology has changed, describe original data collection methodology and any revisions to the process or change in data collected

**Current methodology includes:**

- **Family Review Reports produced by YARDI on a monthly basis**
- **Weekly vacancy reports**
- **Data will be maintained in an Excel Folder**

**No change in the current data collection process is anticipated with the exception of re-thinking how to determine the likelihood of low-income families with asset/interest income are, indeed, more likely to apply for public housing.**

Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity.

**Rent Policies and Term Limits-No change**

***Section 3(a)(2), 3(a)(3)(A) and Section 6(1) of the 1937 Act and 24 CFR 5.603, 5.611, 5.628, 5.630, 5.632, 5.632 and 960.255 and 966 Subpart A as necessary to implement the 2009 PMHA Annual MTW Plan***

**Use of Public Housing as an Incentive for Economic Progress**

***Section 6 (c) of the 1937 Act and 24 CFR 960.201***

- **Rent Adjustment for Income Decreases**  
**Rent adjustment for income decreases that are expected to be 30 days or longer will be processed. Note: Decreases in employment income resulting in less than \$1,000 will not be processed until the next annual re-certification. Plan Year: Prior to 2008 Implemented: Prior to 2008**

Provide detailed information on the impact of the activity and compare against the proposed benchmarks and metrics to assess outcomes including if activity is on schedule

| <b>Statutory Objective</b> | <b>Anticipated Impacts</b>   | <b>Metric</b>   | <b>Baseline</b>  | <b>Benchmark</b>  | <b>Outcome</b>  |
|----------------------------|--|---|--|---|---|
| Cost Effectiveness         | Reduces Administrative Burden for completion of multiple rent calculations | Number of residents with income decreases lasting less than 30 days | 2010 Number of residents with income decreases lasting less than 30 days | 2011 Projection of residents with income decreases lasting less than 30 days 25 | 2011 Actual Number of residents with income decreases lasting less than 30 days |
| Cost Effectiveness         | Less staff time spent on interim re-certifications                         | Staff time and cost savings   | 2010 Staff time saved:<br>Cost savings:                                  | 2011 Projections<br>Hours saved: 75<br>Cost Savings: \$975                      | 2011 Actual Staff time saved:<br>Cost Savings:                                  |

#### **Anticipated Impact**

**Reduces Administrative Burden for completion of multiple rent calculations**

#### **Actual Impact**

**The Housing Specialist delays completion of rent changes until 30 days has past, allowing time for residents to find new employment or other sources of income during the 30-day wait.**

**However, the number of residents that actually find new employment or secure other sources of income during the 30-day wait period was not tracked. This data could be helpful to determine the extent of the reduction in administrative burden.**

#### **Anticipated Impact**

**Allows 30 days for residents to find new employment or recapture lost income**

### **Actual Impact**

**Impact has been achieved. Residents have 30 days to secure new employment or recapture lost income**

If benchmarks were not achieved or if the activity was determined ineffective, provide a narrative explanation of the challenges, and if possible, identify potential new strategies that might be more effective.

**Benchmarks were achieved to the extent that this feature has been fully implemented, however, the extent administrative burden is reduced would be a useful indicator of the value of this feature. Beginning April 1, 2010 the Housing Specialist has been instructed to track residents who find new employment or recapture income during the 30-day period.**

If benchmarks or metrics have been revised; identify any new indicator(s) of activities status and impact

**A new indicator will be the tracking of the number of residents who find new employment or recapture income during the 30-day period.**

If data collection methodology has changed, describe original data collection methodology and any revisions to the process or change in data collected

**Current methodology includes:**

- **Family Review Reports produced by YARDI on a monthly basis**
- **Data will be maintained in an Excel Folder**

**A change in the data collected will include the number of residents who have new employment or income during the 30-day period. The Housing Specialist will track this data.**

Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity.

**Initial, Annual and Interim Income Review Process-No change  
Sections 3 (a)(1) and 3 (a)(2) of the 1937Act and 24 CFR 966.4 and 960.257**

- **Change in employment income  
Change in employment income resulting in an increase or decrease of \$1,000 in annual income is not processed until the next annual re-certification. However, residents are expected to report changes.  
Plan Year: 2008    Implemented: April 2008**

Provide detailed information on the impact of the activity and compare against the proposed benchmarks and metrics to assess outcomes including if activity is on schedule

| Statutory Objective | Anticipated Impacts  | Metric   | Baseline  | Benchmark   | Outcome  |
|---------------------|--|--|---|---|--|
| Cost Effectiveness  | Reduces Administrative Burden for completion of multiple rent calculations | Number of residents with income increases or decreases of \$1,000 or less in annual income | 2010 Number of residents with income increases or decreases of \$1,000 or less in annual income | 2011 Projection of residents with income increases or decreases of \$1,000 or less in annual income<br>12 | 2011 Actual Number of residents with income increases or decreases of \$1,000 or less in annual income |

**Anticipated Impact**

**Staff will have additional time to spend on property management and resident self-sufficiency efforts**

**Actual Impact**

**Workload is reduced by not having to process changes until next annual re-certification. Staff time is reallocated accordingly.**

**Anticipated Impact**

**Provides incentive to maintaining employment**

**Actual Impact**

**Dialogue at resident meetings and resident surveys will be incorporated during 2010 to determine the extent that this feature provides an incentive to maintaining employment.**

If benchmarks were not achieved or if the activity was determined ineffective, provide a narrative explanation of the challenges, and if possible, identify potential new strategies that might be more effective.

**Staff workload is reduced. However, to the extent that this feature serves as an incentive to maintain employment will have to be explored through resident dialogue and surveys during 2010.**

If benchmarks or metrics have been revised; identify any new indicator(s) of activities status and impact

**This feature will be added to 2010 Resident Meeting Agendas to encourage a dialogue with residents to the extent this feature serves as an incentive to maintain employment. Also, a resident survey will**

**also be conducted to determine the impact this feature has on maintaining employment.**

If data collection methodology has changed, describe original data collection methodology and any revisions to the process or change in data collected

**Current methodology includes:**

- **Family Review Reports produced by YARDI on a monthly basis**
- **Vacancy/Unit Turnover report updated weekly**

**Additional data collection will consist of survey information gathered from resident input and Resident Meeting minutes.**

Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity.

**Initial, Annual and Interim Income Review Process-No change  
Sections 3 (a)(1) and 3 (a)(2) of the 1937Act and 24 CFR 966.4 and 960.257**

- **Elderly and Disabled Rent Re-Certification**  
Elderly and disabled households who have 90% or more of their income from Social Security, SSI or other disability payments, and pensions will have a rent re-determination every two years. However, they may choose to have their income reexamined at any time. Plan Year: 1999 Implemented: 1999

Provide detailed information on the impact of the activity and compare against the proposed benchmarks and metrics to assess outcomes including if activity is on schedule

Anticipated Impact

| <b>Statutory Objective</b> | <b>Anticipated Impacts</b>  | <b>Metric</b>       | <b>Baseline</b>  | <b>Benchmark</b>  | <b>Outcome</b>  |
|----------------------------|---|---------------------|--|---|---|
| Cost Effectiveness         | Less staff time spent on annual re-certifications for elderly or disabled residents | Staff Time and Cost | 2008 Number of residents opting out of annual re-certifications<br>24<br>2008 Savings Time=72 hrs.<br>Cost=\$936 | 2009 Projection of residents opting out of annual re-certifications<br>23<br>2009 Projection Savings Time=69 hrs.<br>Cost=\$897 | 2009 Actual Number of residents opting out of annual re-certifications<br>22<br>2009 Savings Time=66 hrs.<br>Cost=\$858 |



**Staff will have additional time to spend on property management and resident quality of life efforts**

**Actual Impact**

**The 91 residents receiving benefit from this feature are those living at Eastowne Manor, Etna House, Washington Group Home and Walnut House. This population comprises 30% of all public housing units. Re-certifications take place on-site to accommodate residents. By providing the option of rent-re-determination every two years, staff costs are reduced through the decrease in paper usage, copying, postage for 3rd party verification of medical and other expenses, etc. It should be pointed out that the EIV access to Social Security and SSI has also added a cost-savings measure to the income verification process by reducing the costs of personnel and office costs in mailing for verification information used in rent calculations.**

**Property Managers review the rent calculations of the Housing Specialist. By reducing the number of re-certifications, review time is decreased, thus allowing additional time for actual property management and resident quality of life efforts.**

**Anticipated Impact**

**Elderly and disabled residents will have an additional incentive to remain in PMHA housing, thus vacancy and turnover time will be reduced**

**Actual Impact**

**During 2009, a total of 7 elderly/disabled residents, or 14%, left Etna House or Eastowne Manor due to reasons other than death or moving to a nursing home as compared to 23% of all moves from public housing.**

**However, to measure the effects of this feature as an "incentive" a survey will be mailed to affected residents and dialogue about this feature will be added to 2010 Resident Meetings agendas.**

**If benchmarks were not achieved or if the activity was determined ineffective, provide a narrative explanation of the challenges, and if possible, identify potential new strategies that might be more effective.**

**Overall, benchmarks are being met.**

If benchmarks or metrics have been revised; identify any new indicator(s) of activities status and impact

**To determine if Elderly/Disabled rent re-certification serves as an incentive to remain in PMHA housing, this feature will be included as an agenda item during 2010 Resident Meetings and through survey of residents at affected developments.**

**Current metrics include comparative analysis (every six months) of length of residency, vacancy/unit turnover rates, and will continue to be used.**

If data collection methodology has changed, describe original data collection methodology and any revisions to the process or change in data collected

**Current data collection Process consists of:**

- **Re-Certification Reports from YARDI**
- **Weekly vacancy/unit turnover reports**
- **Data will be maintained in an Excel Folder**

**Additional data collection will consist of survey information gathered from resident input and Resident Meeting minutes.**

Cite the specific provision(s) of the Act or regulation that is waived under MTW that authorized the Agency to make the change, and briefly describe if and how the waived section of the Act or regulation was necessary to achieve the MTW activity.

**Authorization(s)**

**Initial, Annual and Interim Income Review Process**

***Sections 3 (a)(1) and 3 (a)(2) of the 1937 Act and 24 CFR 966.4 and 960.257***

## Sources and Uses of Funding

List planned vs actual sources (Operating, Capital, and HCV) and uses of MTW Funds (excluding HOPE VI). Provide a narrative description of any major changes from the approved MTW Plan.

**PMHA's planned sources of funds were the same as the actual sources of funds in 2009: Operating Subsidy and Capital Funds provided through the Public Housing programs, and HAP Funds provided for the Housing Choice Voucher Program. Funds used for MTW activities focused on alternative rent structures and the operation of three housing developments that operate in part or total due to permissions granted under MTW: Washington Group Home, Renaissance Place transitional housing for the homeless, and partially the Community Estates development also offering transitional units of housing and supportive services.**

| Source   | Actual Amount | Planned Amount | Uses   |
|--|---------------|----------------|--|
| HUD PHA<br>Operating Grants<br>(PH Operating<br>Subsidy and HCV) | \$13,388,869  | \$12,842,415   | PHA Operations,<br>HCV HAP Subsidy to<br>landlords |
| Capital Grants   | \$411,702     | \$422,000      | Capital<br>Improvements                            |

**There were no major changes or deviations from the approved MTW Plan for 2009.**

List planned vs. actual sources and uses of State and local funds:

**PMHA only planned on local funds from a City of Kent Grant for security and tenant involvement activities in its Kent developments, and did receive a 2009 grant for those activities. PMHA also generates funds for pay for a community education center it owns through the rental of commercial property located in Ravenna. PMHA receives no state government funds.**

| Source             | Actual Amount | Planned Amount | Uses   |
|--------------------|---------------|----------------|--|
| City of Kent Grant | \$7,400       | \$7,800        | Security Improvements at non-Public Housing Developments |
| Investment Income  | \$108,088     | \$95,000       | Operations   |
| Fraud Recovery     | \$78,215      | \$56,320       | Reimbursement to HUD, housing subsidy                    |

If using a cost allocation approach that differs from 1937 Act Requirements, describe the actual deviations that were made during the Plan year:  
**PMHA did not use a cost allocation or fee-for-service approach that differed from the 1937 Act requirements for the Public Housing program.**

List or describe planned vs. actual use of single-fund flexibility:  
**PMHA did not utilize any single-fund flexibility in 2009. The only potential use planned or expected in 2009 was to address possible funding inequities between Public Housing and Housing Choice Vouchers. Historically, the under-funding, through pro-rationed subsidy, created a bias for Housing Choice Voucher program activities to the detriment of Public Housing, but funding for Public Housing was adequate for its purposes and HCV funding was completely used in lease-up activities for housing subsidy.**

**Only one flexible funding activity took place in 2009, and it was minimal use of the HCV Family Self Sufficiency Coordinator funding for homeownership activities for both HCV and Public Housing participants, an approved activity under MTW for PMHA since the founding of the program.**

#### **Administrative**

Description of Progress on the Correction or Elimination of Observed Deficiencies Cited in Monitoring Visits, Physical Inspections, or Other Oversight and Monitoring Mechanisms:

**PMHA was the subject of an extensive audit by the HUD Inspector General for its Housing Choice Voucher Program. In 2009, the HUD Office of Inspector General issued Audit Report Number 2009-CH-1003, which produced two major findings: 1. “The Authority Inappropriately Administered Its Section 8 Project-Based Voucher Program” and 2. “The Authority’s Section 8 Units Did Not Meet HUD’s Housing Quality Standards.” PMHA has submitted several hundred pages of documentation to the Cleveland HUD Field Office along with the OIG to demonstrate its remedies to the findings. This documentation included provision of documentation aimed at rectifying issues of missing paperwork, changes to Administrative Plan policies and procedures and**

increased staff training, and this documentation is under review by the Field Office and the OIG in anticipation of HUD closing out the audit. PMHA also provided a reimbursement of funds to the Housing Choice Voucher Program from non-federal funds. Ironically, the core of the issues addressed under Finding 1 was related to a conflict in interpretation between OIG and PMHA as to the flexibilities offered under Moving to Work. The field auditor stated in the exit interview that the findings cited were related to compliance with the PMHA Administrative Plan, and that no issues cited were considered violations of Federal law or HUD regulations. As a result, new MTW provisions for the Project-Based Voucher program were requested and approved to coordinate the perceived MTW permissions with long-time practice.

Under Finding 2, PMHA has revamped its HQS functions, by terminating its relationship with a private inspection firm and moving the activity as internal function. There have also been changes in Administrative Plan policies.

Results of latest Agency-directed evaluations of the demonstration, as applicable:

**All evaluations of the demonstration are conducted internally by staff, and results of demonstration activities are described in the statistics provided within this report.**

Performance and Evaluation Report for Capital Fund Activities Not Included in the MTW Block Grant:

**See Capital Fund Report attached below.**

Certification that the Agency has met the three statutory requirements of: 1) assuring that at least 75 percent of the families assisted by the Agency are very low-income families; 2) continuing to assist substantially the same total number of eligible low-income families as would have been served had the amounts not been combined; and 3) maintaining a comparable mix of families (by family size) are served, as would have been provided had the amounts not been used under the demonstration.

**PMHA certifies that it meets the three statutory requirements of assuring at least 75% of families assisted are very low-income families, that it continues to assist substantially the same number of eligible low-income families and maintaining a comparable family size mix served as would have been provided had the housing authority not participated in the MTW Demonstration.**

# Capital Fund Reports

| Annual Statement/Performance and Evaluation Report  |   |                      |            |  |            |                   |
|---|---|----------------------|------------|--|------------|-------------------|
| Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary   |   |                      |            |  |            |                   |
| NA Name:  |   |                      |            | Grant Type and Number: 01-12PC0315C108   |            | Final PY of Grant |
| Portage Metropolitan Housing Authority  |   |                      |            | Capital Fund Program Grant No: 2713H   |            | 2008              |
| <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement/Revision Number _____ |   |                      |            | <input type="checkbox"/> Performance and Evaluation Report for Program Year Ending <u>6/30/2008</u> <input type="checkbox"/> Final Performance and Evaluation Report |            |                   |
| Line No.  | Summary by Development Account                            | Total Estimated Cost |            | Total Actual Cost  |            |                   |
|   |   | Original             | Revised    | Obligated  | Expended   |                   |
| 1   | Total Non-CFP Funds                                       | 0.00                 | 0.00       | 0.00   | 0.00       |                   |
| 2   | 1405 Operations   | 16,161.00            | 87,597.25  | 40,810.00  | 40,810.00  |                   |
| 3   | 1408 Management Improvements                              | 88,305.00            | 88,305.00  | 13,911.00  | 13,911.00  |                   |
| 4   | 1410 Administration                                       | 48,885.00            | 51,158.00  | 0.00   | 0.00       |                   |
| 5   | 1411 Audit  | 2,000.00             | 0.00       | 0.00   | 0.00       |                   |
| 6   | 1415 Liquidated Damages                                   | 0.00                 | 0.00       | 0.00   | 0.00       |                   |
| 7   | 1430 Fees and Costs                                       | 0.00                 | 0.00       | 0.00   | 0.00       |                   |
| 8   | 1440 Site Acquisition                                     | 0.00                 | 0.00       | 0.00   | 0.00       |                   |
| 9   | 1450 Site Improvement                                     | 15,000.00            | 0.00       | 0.00   | 0.00       |                   |
| 10  | 1460 Dwelling Structures                                  | 309,500.00           | 276,523.75 | 109,205.27   | 71,351.75  |                   |
| 11  | 1461 Dwelling Equipment - Nonexpandable                   | 0.00                 | 0.00       | 0.00   | 0.00       |                   |
| 12  | 1470 Nondwelling Structures                               | 0.00                 | 0.00       | 0.00   | 0.00       |                   |
| 13  | 1475 Nondwelling Equipment                                | 8,000.00             | 8,000.00   | 0.00   | 0.00       |                   |
| 14  | 1485 Demolition   | 0.00                 | 0.00       | 0.00   | 0.00       |                   |
| 15  | 1490 Replacement Reserve                                  | 0.00                 | 0.00       | 0.00   | 0.00       |                   |
| 16  | 1482 Moving to Work Demonstration                         | 30,000.00            | 15,000.00  | 0.00   | 0.00       |                   |
| 17  | 1495 Relocation Costs                                     | 0.00                 | 0.00       | 0.00   | 0.00       |                   |
| 18  | 1498 Development Activities                               | 0.00                 | 0.00       | 0.00   | 0.00       |                   |
| 19  | 1501 Collateralization or Debt Service                    | 0.00                 | 0.00       | 0.00   | 0.00       |                   |
| 20  | 1502 Contingency  | 0.00                 | 0.00       | 0.00   | 0.00       |                   |
| 21  | Amount of Annual Grant (Sum of Lines 2-20)                | 498,851.00           | 511,584.00 | 163,926.27   | 126,072.75 |                   |
| 22  | Amount of line 21 Related to LBP Activities               | 0.00                 | 0.00       | 0.00   | 0.00       |                   |
| 23  | Amount of line 21 Related to Section 504 Compliance       | 8,500.00             | 0.00       | 0.00   | 0.00       |                   |
| 24  | Amount of line 21 Related to Security - Soft Costs        | 2,000.00             | 0.00       | 0.00   | 0.00       |                   |
| 25  | Amount of line 21 Related to Security - Hard Costs        | 0.00                 | 0.00       | 0.00   | 0.00       |                   |
| 26  | Amount of line 21 Related to Energy Conservation Measures | 0.00                 | 0.00       | 0.00   | 0.00       |                   |

Draftsman, December 2008

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

| PHA Name:<br>Portage Metropolitan Housing Authority |  | Grant Type and Number: CFI2P03150108<br>Capital Fund Program Grant No. 2008<br>Replacement Housing Factor Grant No. 2008 |          |                       | Federal FY of Grant: 2008 |                     |                    |                         |
|---|--|--|----------|-----------------------|---------------------------|---------------------|--------------------|-------------------------|
| Development Number/Line<br>HA-Wide Activities       | General Description of Major Work Categories         | Dev. Act. No   | Quantity | Total Estimated Cost: |                           | Total Actual Cost   |                    | Status of Proposed Work |
|   |  |  |          | Original              | Revised (1)               | Funds Obligated (2) | Funds Expended (2) |                         |
| HA-Wide   | Operations   | 1408   |          | 18,161.00             | 87,587.25                 | 48,810.00           | 40,815.00          |                         |
| HA-Wide   | Management Improvements                              | 1408   |          |                       |                           |                     |                    |                         |
|   | Resident Security                                    |  |          | 2,000.00              | 2,000.00                  | 857.00              | 857.00             |                         |
|   | Develop Job Training & Business Development Programs | 1408.7   |          | 18,000.00             | 18,000.00                 | 551.00              | 651.00             |                         |
|   | Coordinator of Social Services for Drug Elimination  |  |          | 44,805.00             | 14,825.00                 | 12,503.00           | 12,503.00          |                         |
|   | Administrative/Management Improvements               | 1408.3   |          | 3,500.00              | 3,500.00                  |                     |                    |                         |
|   | Total for Management Improvements                    |  |          | 68,305.00             | 58,305.00                 | 13,911.00           | 13,911.00          |                         |
| HA-Wide   | Administration                                       | 1410   |          |                       |                           |                     |                    |                         |
|   | a. Salaries  | 1410.1   |          | 35,280.00             | 31,874.00                 |                     |                    |                         |
|   | b. Fringe Benefits                                   | 1410.8   |          | 13,640.00             | 12,184.00                 |                     |                    |                         |
|   | c. Advertising                                       | 1410.19  |          | 580.00                | 0.00                      |                     |                    |                         |
|   | Total for Administration                             |  |          | 49,500.00             | 44,058.00                 | 0.00                | 0.00               |                         |
| HA-Wide   | Fees & Costs   | 1430   |          |                       |                           |                     |                    |                         |
|   | a. Architect   |  |          | 0.00                  | 0.00                      |                     |                    |                         |
|   | b. Planning Fees                                     |  |          | 0.00                  | 0.00                      |                     |                    |                         |
|   | Total for Fees & Costs                               |  |          | 0.00                  | 0.00                      | 0.00                | 0.00               |                         |
| HA-Wide   | Non Dwelling Structures                              | 1470   |          |                       |                           |                     |                    |                         |
|   | Total for Non Dwelling Structures                    |  |          | 0.00                  | 0.00                      | 0.00                | 0.00               |                         |
| HA-Wide   | Non Dwelling Equipment                               | 1475   |          |                       |                           |                     |                    |                         |
|   | a. Office/Maintenance Equipment                      |  |          | 9,000.00              | 9,000.00                  |                     |                    |                         |
|   | b. Vehicle   |  |          |                       |                           |                     |                    |                         |
|   | Total for Non Dwelling Equipment                     |  |          | 9,000.00              | 9,000.00                  | 0.00                | 0.00               |                         |
| HA-Wide   | Relocation Cost                                      | 1485.1   |          | 0.00                  | 0.00                      | 0.00                | 0.00               |                         |
| HA-Wide   | Contingency  | 1502   |          | 0.00                  | 0.00                      | 0.00                | 0.00               |                         |

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

| PHA Name:<br>Portage Metropolitan Housing Authority                   |  | Grant Type and Number: OHS12903150108<br>Capital Fund Program Grant No: 2005<br>Replacement Housing Factor Grant Ref: 2008 |                |                                    | Federal FY of Grant: 2008 |                    |                   |                             |  |
|---|--|--|----------------|------------------------------------|---------------------------|--------------------|-------------------|-----------------------------|--|
| Development Number/Name RA/Code Activities                            | General Description of Major Work Categories   | Dev. Acct. No  | Quantity       | Total Estimated Cost:              |                           | Total Actual Cost: |                   | Status of Proposed Work (2) |  |
|   |  |  |                | Original                           | Revised                   | Funds Obligated    | Funds Expended    |                             |  |
| OHS1-02<br>Scattered Sites<br>Marks Avenue                            | Drainage As Needed<br>Replace Sidewalks and Front Concrete Slabs<br>Total for Site Improvement                                     | 1450   | All            | 5,000.00<br>10,000.00<br>15,000.00 | 0.00<br>0.00<br>0.00      | 0.00               | 0.00              |                             |  |
| OHS1-01<br>Athena Gardens   | Repl Kitchen/Cabinets/Counter Tops/Sinks/Faucets<br>Replace Cold Air Returns   | 1460   | 25<br>All      | 70,000.00<br>8,000.00              | 50,025.75<br>0.00         | 50,025.75          | 50,023.75         |                             |  |
| OHS1-01<br>Community Estates  | Repl Kitchen/Cabinets/Counter Tops/Sinks/Faucets<br>Replace Cold Air Returns   |  | 28<br>All      | 62,000.00<br>7,000.00              | 0.00<br>0.00              |                    |                   | Moved to 501-07             |  |
| OHS1-02<br>Scattered Sites<br>220, 222, 228 & 228<br>W. Elm St - Kent | Replace Flooring<br>Repl Roms/GuHera/Cow/rapoute/Carpet<br>Renovation to Bath Rooms<br>Tubs/Surrounds/Vanities/Sinks/Faucets/Floor |  | As Needed<br>4 | 72,000.00<br>20,000.00             | 52,813.48<br>69,161.52    | 0.00<br>52,161.52  | 0.00<br>21,325.00 |                             |  |
| 425-432/ 433 & 433<br>Marks Ave - Ruidisgwil                          | Replace All Windows  |  | All            | 16,000.00                          | 0.00                      |                    |                   |                             |  |
| OHS10-02<br>620 & 822 Mechanics                                       | Rep Siding/windows/interior/exterio doors/Asaba Asbestos<br>LBR/wiring/plumbing/roof/porch/hotel renovations                       |  |                |                                    | 102,620.00                |                    |                   |                             |  |
| OHS1-04<br>Eastowne Manor   | Handicapped Bathroom   |  | As Needed      | 8,500.00                           | 0.00                      |                    |                   |                             |  |
| OHS1-08<br>Town Square<br>Villes                                      | Replace All Shed Doors and Thresholds  |  | All            | 32,000.00                          | 32,000.00                 |                    |                   |                             |  |
| OHS1-05<br>Elms House   |  |  |                |                                    |                           |                    |                   |                             |  |
| OHS1-09<br>Heritage Knolls  |  |  |                |                                    |                           |                    |                   |                             |  |
| OHS1-10<br>Revermo Single Homes                                       |  |  |                |                                    |                           |                    |                   |                             |  |
| OHS1-11<br>Washington Group Home                                      |  |  |                |                                    |                           |                    |                   |                             |  |
| OHS1-15<br>Acquisition Range Bldgs                                    |  |  |                |                                    |                           |                    |                   |                             |  |
| Total for Dwelling Structures   |  |  |                |                                    | 309,630.00                | 278,523.75         | 109,205.27        | 71,881.75                   |  |
|   |  |  |                | 1466                               |                           |                    |                   |                             |  |
|   |  |  |                | 1470                               |                           |                    |                   |                             |  |
| Total for Non Dwelling Structures                                     |  |  |                |                                    | 0.00                      | 0.00               | 0.00              | 0.00                        |  |



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

| Development Number/Name HA-Wide Activities   | All Funds Obligated (Quarter Ending Date) |             |            | All Funds Expended (Quarter Ending Date)   |             |            | Reasons for Revised Target Dates (2) |
|--|---|-------------|------------|--|-------------|------------|--------------------------------------|
|  | Original                                  | Revised (1) | Actual (2) | Original   | Revised (1) | Actual (2) |                                      |
| CH31-01<br>Athena Gardens                    | 08/30/10                                  |             |            | 08/30/12   |             |            |                                      |
| CH31-02<br>Community Center                  | 03/30/10                                  |             |            | 08/30/12   |             |            |                                      |
| CH31-02<br>Sculpted Stone                    | 08/30/10                                  |             |            | 06/30/12   |             |            |                                      |
| CH31-03<br>Ravenna Woods                     |   |             |            |  |             |            |                                      |
| CH31-04<br>Eastowne Manor                    | 03/30/10                                  |             |            | 06/30/12   |             |            |                                      |
| CH31-05<br>Town Square                       | 05/30/10                                  |             |            | 08/30/12   |             |            |                                      |
| CH31-06<br>Elys House                        |   |             |            |  |             |            |                                      |
| CH31-09<br>Hartlage Knolls                   | 03/30/10                                  |             |            | 08/30/12   |             |            |                                      |
| HA-Wide<br>Physical Improvements             | 08/30/10                                  |             |            | 08/30/12   |             |            |                                      |
| HA-Wide<br>Mgmt. Impr.                       | 08/30/10                                  |             |            | 08/30/12   |             |            |                                      |
| HA-Wide<br>Administration                    | 08/30/10                                  |             |            | 08/30/12   |             |            |                                      |
| HA-Wide<br>Fees & Costs                      | 08/30/10                                  |             |            | 08/30/12   |             |            |                                      |
| HA-Wide<br>Contingency                       |   |             |            |  |             |            |                                      |
| Signature of Executive Director & Date:<br>X |   |             |            | Signature of Public Housing Director/Office of Native American Programs Administrator & Date:<br>X |             |            |                                      |

|  |  |  |                                      |  |                 |
|--|--|--|--------------------------------------|--|-----------------|
| <b>Part I: Summary</b>   |  | <b>Grant Type and Number</b>   |                                      | <b>FFY of Grant:</b>   |                 |
| <b>PMA Name:</b>   |  | Capital Fund Program Grant No: OH12P03*50108                         |                                      | Replacement Housing Factor Grant No:   |                 |
| <b>Portage Metropolitan Housing Authority</b>  |  | Desc of CFFP:  |                                      | FFY of Grant Approval:   |                 |
| <input type="checkbox"/> Original Annual Statement<br><input type="checkbox"/> Performance and Evaluation Report of Period Ending: |  | <input checked="" type="checkbox"/> Reserve for Disaster/Emergencies |                                      | <input type="checkbox"/> Revised Annual Statement (revision no: 0 <sup>2</sup> )<br><input type="checkbox"/> Final Performance and Evaluation Report |                 |
| <b>Line</b>  | <b>Summary by Development Account</b>                                    | <b>Total Estimated cost</b>  |                                      | <b>Total Actual Cost</b>   |                 |
|  |  | <b>Original</b>  | <b>Revised 2</b>                     | <b>Obligated</b>   | <b>Expanded</b> |
| 1  | Total non-CFF Funds  |  |                                      |  | 0.00            |
| 2  | 1406 Operations (may not exceed 20% of line 21) 5                        | 102,316.00   | 78,336.01                            | 0.00   | 0.00            |
| 3  | 1408 Management Improvements   | 63,350.00  | 67,000.00                            | 0.00   | 0.00            |
| 4  | 1410 Administrator ( may not exceed 13% of line 21)                      | 51,158.00  | 40,983.00                            | 2,618.88   | 2,618.98        |
| 5  | 1411 Audit   | 0.00   | 0.00                                 | 0.00   | 0.00            |
| 6  | 1414 Liquidated Damages  | 0.00   | 0.00                                 | 0.00   | 2.00            |
| 7  | 1490 Fees and Cost   | 0.00   | 0.00                                 | 0.00   | 0.00            |
| 8  | 1490 Site Acquisition  | 0.00   | 0.00                                 | 0.00   | 0.00            |
| 9  | 1490 Site Improvement  | 13,118.00  | 71,713.00                            | 0.00   | 0.00            |
| 10   | 1430 Dwelling Structures   | 169,508.00   | 208,597.00                           | 17,642.76  | 17,642.76       |
| 11   | 1436.1 Dwelling Equipment - Nonexpendable                                | 0.00   | 0.00                                 | 0.00   | 0.00            |
| 12   | 1470 Non-dwelling Structures   | 0.00   | 0.00                                 | 0.00   | 0.00            |
| 13   | 1476 Non-dwelling Equipment  | 3,500.00   | 3,500.00                             | 0.00   | 0.00            |
| 14   | 1485 Demolition  | 0.00   | 0.00                                 | 0.00   | 0.00            |
| 15   | 1492 Moving to Work Demonstration  | 5,000.00   | 56,000.00                            | 0.00   | 0.00            |
| 16   | 1493.3 Relocation Costs  | 0.00   | 0.00                                 | 0.00   | 0.00            |
| 17   | 1499 Development Activities - 4  | 0.00   | 0.00                                 | 0.00   | 0.00            |
| 18a  | 1501 Collateralization or Debt Service paid by the PMA                   | 0.00   | 0.00                                 | 0.00   | 0.00            |
| 18b  | 1500 Collateralization or Debt Service paid via System of Direct Payment | 0.00   | 0.00                                 | 0.00   | 0.00            |
| 19   | 1502 Contingency (may not exceed 3% of line 20)                          | 3,500.00   | 0.00                                 | 0.00   | 0.00            |
| 20   | Amount of Annual Grant. (sum of lines 2 - 19)                            | 512,564.00   | 608,593.00                           | 0.00   | 0.00            |
| 21   | Amount of line 20 Related to LBP Activities                              | 0.00   | 0.00                                 | 0.00   | 0.00            |
| 22   | Amount of line 20 Related to Section 504 Activities                      | 5,000.00   | 6,500.00                             | 0.00   | 0.00            |
| 23   | Amount of line 20 Related to Security - Soft Costs                       | 2,000.00   | 2,000.00                             | 0.00   | 0.00            |
| 24   | Amount of line 20 Related to Security - Hard Costs                       | 0.00   | 0.00                                 | 0.00   | 0.00            |
| 25   | Amount of line 20 Related to Energy Conservation Measures                | 0.00   | 0.00                                 | 0.00   | 0.00            |
| Signature of Executive Director  |  | Date   | Signature of Public Housing Director |  | Date            |
|  |  | December 1 2009  |                                      |  |                 |

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| Part II: Supporting Pages                           |   |  |          |                       |                       |                      |                     |                |
|---|---|--|----------|-----------------------|-----------------------|----------------------|---------------------|----------------|
| PHA Name:   |   | Grant Type and Number: <input type="checkbox"/> CFP (Year/No): _____ |          |                       | Federal FFY of Grant: |                      |                     |                |
| Portage Metropolitan Housing Authority              |   | Capital Fund Program Grant No: DH12P03100-05                         |          |                       | 2009                  |                      |                     |                |
|   |   | Replacement Housing Factor Grant No:                                 |          |                       |                       |                      |                     |                |
| Development Number<br>Name/PHA - Wide<br>Activities | General Description of Major Work<br>Categories | Development<br>Account No.   | Quantity | Total Estimated Costs |                       | Total Actual Cost    |                     | Status of Work |
|   |   |  |          | Original              | Revised 1             | Funds<br>Obligated 2 | Funds<br>Expended 2 |                |
| EAST  | Operations                                      | 1408   |          | 51,158.00             | 37,883.00             |                      |                     |                |
| WEST  | Operations                                      | 1409   |          | 51,158.00             | 37,883.00             |                      |                     |                |
| <b>Management Improvements</b>                      |   |  |          |                       |                       |                      |                     |                |
| EAST  | Resident Security                               | 1408   |          | 1,000.00              | 1,000.00              |                      |                     |                |
| WEST  | Resident Security                               | 1408   |          | 1,000.00              | 1,000.00              |                      |                     |                |
| EAST  | Dev Job Training/Business                       | 1408   |          | 7,500.00              | 0.00                  |                      |                     |                |
| WEST  | Dev Job Training/Business                       | 1408   |          | 7,500.00              | 0.00                  |                      |                     |                |
| EAST  | Coordinator Drug Elimination                    | 1408   |          | 23,250.00             | 32,500.00             |                      |                     |                |
| WEST  | Coordinator Drug Elimination                    | 1408   |          | 23,250.00             | 32,500.00             |                      |                     |                |
| <b>Administration</b>                               |   |  |          |                       |                       |                      |                     |                |
| EAST  | Salaries/Fringe Benefits                        | 1410   |          | 25,279.00             | 25,497.00             | 2,919.99             |                     |                |
| WEST  | Salaries/Fringe Benefits                        | 1410   |          | 25,279.00             | 25,495.00             |                      |                     |                |
| EAST  | Advertising for Bids                            | 1410   |          | 375.00                |                       |                      |                     |                |
| WEST  | Advertising for Bids                            | 1410   |          | 225.00                |                       |                      |                     |                |
| <b>Non-dwelling Equipment</b>                       |   |  |          |                       |                       |                      |                     |                |
| EAST  | Maintenance Equipment                           | 1475   |          | 1,750.00              | 1,750.00              |                      |                     |                |
| WEST  | Maintenance Equipment                           | 1475   |          | 1,750.00              | 1,750.00              |                      |                     |                |
| HA - WIDE   | Contingency                                     | 1502   |          | 3,500.00              |                       |                      |                     |                |

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| Part II: Supporting Pages                        |                                |  |           |                         |                       |                       |           |                   |
|--|--------------------------------|--|-----------|-------------------------|-----------------------|-----------------------|-----------|-------------------|
| PHA Name:  |                                | Grant Type and Number CFFP (Year/No):        |           |                         | Federal FFY of Grant: |                       |           |                   |
| Portage Metropolitan Housing Authority           |                                | Capital Fund Program Grant No: OH12P03150100 |           |                         | 2009                  |                       |           |                   |
| Development Number Name/PHA - I/Units Activities |                                | General Description of Major Work Categories |           | Development Account No. | Quantity              | Total Estimated Costs |           | Status of Work    |
|  |                                |  |           |                         |                       | Original              | Revised 1 | Total Actual Cost |
|  |                                |  |           |                         |                       |                       |           | Funds Obligated 2 |
|  |                                |  |           |                         |                       |                       |           | Funds Expended 2  |
| <b>EAST SIDE</b>                                 |                                |  |           |                         |                       |                       |           |                   |
| OH12P031-003                                     | Replace Flooring               | 1480   | All       |                         |                       | 55,000.00             | 55,000.00 |                   |
| Ravenna Woods                                    | Repl Exterior Drs/Thresholds   | 1460   | All       |                         |                       | 35,000.00             | 35,000.00 |                   |
|  | Replace Utility Doors in Units | 1460   | All       |                         |                       | 15,500.00             | 0.00      |                   |
|  | Install Utility Clean-Outs     | 1450   | All       |                         |                       |                       | 17,470.00 |                   |
| OH12P031-004                                     | Replace Flooring               | 1460   | All       |                         |                       | 47,000.00             | 49,600.00 |                   |
| Eastowne Manor                                   | ADA Bath/Shower/Commode        | 1460   | If Needed |                         |                       | 5,200.00              | 5,000.00  |                   |
| OH12P031-006                                     | Replace Flooring               | 1460   | All       |                         |                       | 42,000.00             | 44,254.22 |                   |
| Elna House                                       |                                |  |           |                         |                       |                       |           |                   |
| OH12031-011                                      | Replace Flooring               | 1460   | All       |                         |                       |                       | 17,842.76 | 17,842.76         |
| Washington Group                                 |                                |  |           |                         |                       |                       |           |                   |
|  |                                | 1460   | All       |                         |                       |                       |           |                   |
|  |                                | 1485 3                                       |           |                         |                       |                       |           |                   |
| <b>WEST SIDE</b>                                 |                                |  |           |                         |                       |                       |           |                   |
| OH12P031-001                                     | Repl Concrete Sidewalks/Steps  | 1460   | As Needed |                         |                       | 38,000.00             | 0.00      |                   |
| Athens Gardens                                   | Replace Privacy Fences         | 1460   | All       |                         |                       | 45,110.00             | 64,243.00 |                   |

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| Part I: Summary   |  |  |           |   |          |
|---|--|--|-----------|---|----------|
| PHA Name:<br><b>Portage Metropolitan Housing Authority</b>  |  | Grant Type and Number<br>Capital Fund Program Grant No: _____<br>Date of CFPP: _____ |           | Replacement Housing Factor Grant No: _____<br>FFY of Grant: _____<br>FFY of Grant Approval: _____ |          |
| Type of Grant:<br><input type="checkbox"/> Original Annual Statement Performance and Evaluation Report, or Period Ending: _____<br><input type="checkbox"/> Reserve for Disasters/Emergencies<br><input type="checkbox"/> Revised Annual Statement (revision no: _____)<br><input type="checkbox"/> Final Performance and Evaluation Report |  |  |           |   |          |
| Line  | Summary by Development Account   | Total Estimated cost   |           | Total Actual Cost   |          |
|   |  | Original   | Revised 2 | Obligated   | Expended |
| 1   | Total non-CFF Funds  |  |           |   |          |
| 2   | 1406 Operations (may not exceed 20% of line 21) 3                        | 0.00   | 0.00      | 0.00  | 0.00     |
| 3   | 1408 Management Improvements   | 0.00   | 0.00      | 0.00  | 0.00     |
| 4   | 1410 Administration ( may not exceed 10% of line 21)                     | 64,796.00  | 0.00      | 0.00  | 0.00     |
| 5   | 1411 Audit   | 0.00   | 0.00      | 0.00  | 0.00     |
| 6   | 1416 Liquidated Damages  | 0.00   | 0.00      | 0.00  | 0.00     |
| 7   | 1420 Fees and Cost   | 0.00   | 0.00      | 0.00  | 0.00     |
| 8   | 1440 Site Acquisition  | 0.00   | 0.00      | 0.00  | 0.00     |
| 9   | 1450 Site Improvement  | 55,000.00  | 0.00      | 0.00  | 0.00     |
| 10  | 1460 Dwelling Structures   | 478,605.00   | 0.00      | 0.00  | 0.00     |
| 11  | 1465.1 Dwelling Equipment - Non-expendable                               | 9,030.00   | 0.00      | 0.00  | 0.00     |
| 12  | 1470 Non-dwelling Structures   | 0.00   | 0.00      | 0.00  | 0.00     |
| 13  | 1475 Non-dwelling Equipment  | 0.00   | 0.00      | 0.00  | 0.00     |
| 14  | 1480 Demolition  | 0.00   | 0.00      | 0.00  | 0.00     |
| 15  | 1490 Moving in Work Demonstration  | 0.00   | 0.00      | 0.00  | 0.00     |
| 16  | 1495 Depreciation Costs  | 0.00   | 0.00      | 0.00  | 0.00     |
| 17  | 1498 Development Activities 4  | 0.00   | 0.00      | 0.00  | 0.00     |
| 18a   | 1501 Collateralization or Debt Service paid by the PHA                   | 0.00   | 0.00      | 0.00  | 0.00     |
| 18ba  | 1502 Collateralization or Debt Service paid Via System of Direct Payment | 0.00   | 0.00      | 0.00  | 0.00     |
| 19  | 1502 Contingency (may not exceed 8% of line 20)                          | 0.00   | 0.00      | 0.00  | 0.00     |
| 20  | Amount of Annual Grant (sum of lines 2 - 19)                             | 547,436.00   | 0.00      | 0.00  | 0.00     |
| 21  | Amount of line 20 Related to LEP Activities                              | 0.00   | 0.00      | 0.00  | 0.00     |
| 22  | Amount of line 20 Related to Section 504 Activities                      | 0.00   | 0.00      | 0.00  | 0.00     |
| 23  | Amount of line 20 Related to Security - Soft Costs                       | 0.00   | 0.00      | 0.00  | 0.00     |
| 24  | Amount of line 20 Related to Security - Hard Costs                       | 0.00   | 0.00      | 0.00  | 0.00     |
| 25  | Amount of line 20 Related to Energy Conservation Measures                | 0.00   | 0.00      | 0.00  | 0.00     |
| Signature of Executive Director   |  | Date   |           | Signature of Public Housing Director  |          |
|   |  |  |           |   |          |

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| Part II: Supporting Pages              |  |  |          |                       |                       |                   |                  |                |
|--|--|--|----------|-----------------------|-----------------------|-------------------|------------------|----------------|
| PHA Name:                              |  | Grant Type and Number: CFFP (Year No):       |          |                       | Federal FFY of Grant: |                   |                  |                |
| Portage Metropolitan Housing Authority |  | Capital Fund Program Grant No: OH12P03150109 |          |                       | 2009                  |                   |                  |                |
| Development Number                     |  | Development Account No.                      | Quantity | Total Estimated Costs |                       | Total Actual Cost |                  | Status of Work |
| Name/PHA - Wide Activities             | General Description of Major Work Categories |  |          | Original              | Revised 1             | Funds Obligated 2 | Funds Expended 2 |                |
| EAST                                   | Operations                                   | 1406   |          |                       | 0.00                  |                   |                  |                |
| WEST                                   | Operations                                   | 1406   |          |                       | 0.00                  |                   |                  |                |
| <b>Management Improvements</b>         |  |  |          |                       |                       |                   |                  |                |
| EAST                                   | Resident Security                            | 1408   |          |                       | 0.00                  |                   |                  |                |
| WEST                                   | Resident Security                            | 1408   |          |                       | 0.00                  |                   |                  |                |
| EAST                                   | Dev Job Training/Business                    | 1408   |          |                       | 0.00                  |                   |                  |                |
| WEST                                   | Dev Job Training/Business                    | 1408   |          |                       | 0.00                  |                   |                  |                |
| EAST                                   | Coordinator Drug Elimination                 | 1408   |          |                       | 0.00                  |                   |                  |                |
| WEST                                   | Coordinator Drug Elimination                 | 1408   |          |                       | 0.00                  |                   |                  |                |
| <b>Administration</b>                  |  |  |          |                       |                       |                   |                  |                |
| EAST                                   | Salaries/Fringe Benefits                     | 1410   |          |                       | 48,597.00             | 0.00              |                  |                |
| WEST                                   | Salaries/Fringe Benefits                     | 1410   |          |                       | 18,189.00             | 0.00              |                  |                |
| <b>Non-dwelling Equipment</b>          |  |  |          |                       |                       |                   |                  |                |
| EAST                                   | Maintenance Equipment                        | 1475   |          |                       | 0.00                  |                   |                  |                |
| WEST                                   | Maintenance Equipment                        | 1475   |          |                       | 0.00                  |                   |                  |                |
| HA - WIDE                              | Contingency                                  | 1602   |          |                       | 0.00                  | 0.00              |                  |                |

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| <b>Part II: Supporting Pages</b>                    |   |  |          |                       |                       |                      |                     |                |
|---|---|--|----------|-----------------------|-----------------------|----------------------|---------------------|----------------|
| PHA Name:   |   | Grant Type and Number CFFP (Yes/No):         |          |                       | Federal FFY of Grant: |                      |                     |                |
| Portage Metropolitan Housing Authority              |   | Capital Fund Program Grant No. OH-2P0315D109 |          |                       | 2009                  |                      |                     |                |
|   |   | Replacement Housing Factor Grant No:         |          |                       |                       |                      |                     |                |
| Development Number<br>Name/PHA - Wide<br>Activities | General Description of Major Work<br>Categories | Development<br>Account No.                   | Quantity | Total Estimated Costs |                       | Total Actual Cost    |                     | Status of Work |
|   |   |  |          | Original              | Revised 1             | Funds<br>Obligated 2 | Funds<br>Expended 2 |                |
| <b>EAST SIDE</b>                                    |   |  |          |                       |                       |                      |                     |                |
| OH12P031-001  | Community Estates                               | 1480   | All      | 52,000.00             |                       |                      |                     |                |
| OH12P031-003  | Ravenna Woods                                   | 1480   |          | 55,000.00             |                       |                      |                     |                |
| OH12P031-004  | Eastowne Manor                                  | 1480   | All      | 106,000.00            |                       |                      |                     |                |
| OH12P031-008  | Etna House                                      | 1480   |          | 42,000.00             |                       |                      |                     |                |
| OH12P031-015  | Acquisition Rehab                               | 1480   | All      | 98,000.00             |                       |                      |                     |                |
| OH12P031-004-Eastowne                               | Acquisition Rehab                               | 1480   | All      | 116,808.00            |                       |                      |                     |                |
| OH-2P031-015  | Concrete Work                                   | 1450   |          | 25,000.00             |                       |                      |                     |                |
| Acquis/East Rehab                                   | Replace Furnaces                                | 1465   | 5        | 9,000.00              |                       |                      |                     |                |
| <b>WEST SIDE</b>                                    |   |  |          |                       |                       |                      |                     |                |
| OH12P031-008  | Heritage Knolls                                 | 1480   |          | 35,000.00             |                       |                      |                     |                |
| OH12P031-005  | Townsquare Villas                               | 1480   |          | 35,000.00             |                       |                      |                     |                |

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