

PORTAGE METROPOLITAN HOUSING AUTHORITY

2012 Annual MTW Plan

Portage Metropolitan Housing Authority (OH 031)

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I. Introduction

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OVERVIEW OF AGENCY'S MTW GOALS AND OBJECTIVES

Portage Metropolitan Housing Authority establishes the following goals and objectives for 2012:

1. Maintain and Expand Excellence in Property Management
 - PMHA will continue to achieve property management results for Public Housing that equate to High Performer status.
 - PMHA will expand the number of units within its portfolio of housing.
 - PMHA plans to be selected to provide contract property management services for other housing providers in Portage County.
2. Achieve and Maintain Excellence in Tenant-Based Housing Programs
 - PMHA will continue to achieve program results equating to High Performer status.
 - Tenant-based housing programs will achieve and maintain full lease-up.
 - Five households will become new homeowners through the Housing Choice Voucher Homeownership Program in 2012
3. Improve Productivity and Cost Effectiveness
 - Expand system of electronic benefits payments beyond test phase for landlords and program participants.
 - The Yardi software will be upgraded and staff provided training in the applicable features of the program for managing PMHA programs and operations.
4. 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 will investigate opportunities to develop and manage permanent supportive housing.
 - PMHA will investigate methods of inter-agency cooperation that will lessen barriers to assistance for applicants and participants.

II. General Housing Authority Operating Information

A. HOUSING STOCK INFORMATION

Number of public housing units at the beginning of the year:

Portage Metropolitan Housing Authority has 305 units of public housing under ACC as of the date of submission of this plan. Of the total, 4 units are not used for housing, but rather for supportive services on-site. PMHA will submit application to dispose of three units during 2012 and expects to complete the disposition during the year.

General description of any planned significant capital expenditures by development:

A listing of Capital Fund projects for the next year and five years is included at the end of Section 7. PMHA is not planning any significant capital expenditures by development that meets the HUD definition of "significant."

Description of any new public housing units to be added during the year by development:

Portage Metropolitan Housing Authority plans to replace the three units to be disposed of in late 2011 or early 2012, during the upcoming 2012 year. The likely scenario would be to replace the disposed scattered-site units with other scattered-site units.

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

PMHA has plans to dispose of three units. Two units are a duplex that was converted to a homeless shelter. The shelter providers have built a new facility and thus no longer need the building and it is cost-prohibitive to re-hab back into a duplex. Additionally, the entire neighborhood except for the property has been sold to Kent State University and all the other buildings around it are or will be demolished. The university desires to acquire this building from PMHA. The other property is a 4-bedroom single family home, and between age and the costs to rehabilitate the property, it is not a cost-effective choice for rehab. It also does not fit into the strategic goals of the agency as far as operations and day to day costs.

Number of MTW Housing Choice Vouchers (HCV) units authorized:

Portage Metropolitan Housing Authority has 1,524 Housing Choice Vouchers authorized and considered MTW Housing Choice Vouchers.

Number of non-MTW Housing Choice Voucher units authorized:

Portage Metropolitan Housing Authority has 74 Mainstream Housing Choice Vouchers that comply with the NOFA requirements for administration and are not part of the MTW Demonstration. There are also 18 enhanced Housing Choice Vouchers that comply with regulations applicable to that form of assistance.

Number of HCV units to be project-based during the Plan year, including description of each separate project:

PMHA has project-based 91 Housing Choice Vouchers under MTW authority. PMHA's entire project-based Voucher program is operated under MTW authority.

These projects are:

Coleman Professional Services- Several group homes; residents receive mental health services from Coleman Professional Services. Coleman has 16 units under contract among their 45 units in affected projects.

F&CS- A mixture of duplexes and multi-family (low rise) units; residents receive a variety of supportive service aimed at increases self-sufficiency. There are 32 units under PBV contract among the 48 units in affected projects.

Prospect House- A high rise building for low-income elderly tenants; residents have access to all supportive services provided by Neighborhood Development Services Inc. PMHA has 26 units under contract at this property, which has 66 total units.

CEDCorp/Maple Grove- Row houses/townhouses; residents have access to all supportive services provided by Neighborhood Development Services Inc. Of the 57 units at this project, 7 are under contract for vouchers.

NDS Portage Housing II- Newly constructed tax-credit single-family homes; residents have access to all supportive services provided by Neighborhood Development Services Inc. Two units are project-based among the 25 total units.

NDS Portage Housing III- Newly constructed tax-credit single-family homes; residents have access to all supportive services provided by Neighborhood Development Services Inc. There are 8 project-based units among the 30 units at this project.

Streetsboro Family Homes – PMHA expects to have 28 units of newly constructed tax-credit townhouses for the Project-Based Voucher Program, with supportive services included. All units would be project-based units.

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. A duplex with units leasing for \$589 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.

B. LEASING INFORMATION (PLANNED)

Anticipated total number of MTW public housing units leased in the Plan year:

All PMHA Public Housing units are considered MTW units. All available residential units will be leased during the year. Four units are under ACC but are permitted to be used for site-based services while retaining subsidy, at Renaissance Place, Community Estates and Washginton Group Home (2 units).

Anticipated total number of non-MTW public housing units leased in Plan year.

There are no non-Moving to Work Public Housing units at Portage Metropolitan Housing Authority.

Anticipated total number of MTW Housing Choice Voucher units leased in the Plan year:

PMHA anticipates being fully leased during 2012 for the Housing Choice Voucher Program. Fully leased is defined as all 1,616 vouchers or 100% of the funding allocated for HAP contracts during the year. Of these, 1,524 are MTW Vouchers, the remaining 92 are non- MTW vouchers.

Anticipated total number of non-MTW Housing Choice Voucher units leased in the Plan year:

Ninety-two vouchers are anticipated to be leased in 2012, under the Mainstream Voucher Program and enhanced vouchers.

Description of anticipated issues relating to any potential difficulties in leasing units:

PMHA offers affordable, quality housing in locations that ought to ensure leasing levels of 98% or greater for the year. Recent Capital Fund and ARRA modernization efforts have improved the properties in the Public Housing inventory, but in many cases, PMHA must compete against a more desirable Housing Choice Voucher program as well as newer construction developed through the low income housing tax credit program. Some sites are also located in neighborhoods or rural communities with limited transportation, leading at times to less than desirable vacancies in selected single family homes.

The Housing Choice Voucher Program is not expected to face lease-up issues in 2012. Although more people are seeking rental units as the cumulative effect of foreclosures logically should have increased the number of persons seeking rental housing, there are also more units potentially available for investors to acquire and lease under the voucher program. Rents appear to be increasing somewhat with increased demand for rental

housing. Availability of security deposit funding will continue to be an issue, as HCV landlords may charge one month's total rent for a security deposit and many do follow that procedure.

C. WAITING LIST INFORMATION

Description of anticipated changes in waiting lists:

PMHA anticipates making no changes in its waiting lists in 2012.

Description of anticipated changes in the number of families on the waiting list(s) and/or opening and closing of the waiting lists:

PMHA operates two program waiting lists, for Public Housing and Section 8. These waiting lists operate independently of each other, in that a program participant in one program remains eligible for the other waiting list. PMHA anticipates that the Section 8 Wait List will be re-opened in 2011, and that a net increase of 600 households will be added to the list by the end of 2011. The Public Housing Wait List remains open continuously, and PMHA projects an increase of 3% to the waiting list for that program.

III. Non-MTW Related Housing Authority

A. PLANNED SOURCES AND USES OF OTHER HUD OR OTHER FEDERAL FUNDS

Portage Metropolitan Housing Authority has a Shelter Plus Care housing program for 25 units of housing for individuals with disabilities. Households receive supportive services through Coleman Professional Services, while PMHA provides housing subsidy to allow the family safe, decent, affordable housing. The Shelter Plus Care grant is an annual grant, requiring renewal applications through Ohio's Balance of State application process. In 2012, PMHA anticipates submitting an application for a renewal of the Shelter Plus Care grant, and will seek an expansion to 50 units.

PMHA would anticipate pursuing another ROSS grant if funding is made available to support activities at either family sites or for the senior/disabled Public Housing developments. PMHA does not anticipate pursuing other Federal funds, but will reconsider this position based on available funding opportunities.

B. DESCRIPTION OF NON-MTW ACTIVITIES PROPOSED BY THE AGENCY

PMHA expects to acquire an affordable housing development called Terrill Suites in 2012, either through the housing authority or through its non-profit affiliate, Franklin Development. This project is being funded primarily through low income housing tax credits as a rehabilitation project, and is currently affordable family housing located in Ravenna, Ohio. Rehab of the project is expected to begin in 2012.

PMHA is also expected to become the property managers of a low income housing tax credit development to be built in Streetsboro, Ohio. This project will begin construction in 2012 and will consist of 24 units of family housing.

Resident Commissioner: The City Manager of Kent, Ohio appoints the resident commissioner position. As of October 31, 2011, this appointment will be Linda Umbayemake.

Non-Smoking Policy for Public Housing: PMHA has adopted a non-smoking policy for Walnut House, a Public Housing development in Ravenna. This building houses 13 households, individuals with mental illnesses and provided supportive services by Coleman Professional Services. PMHA is seeking to add the Washington Group Home as a non-smoking housing facility in the no-smoking facilities. Smoking will be allowed on the grounds of the property, but not for the interior of the building. The Washington Group Home is currently vacant and transitioning into a group home for young adults, and the timing for such a change in policy is ideal.

Violence Against Women Act: PMHA is committed to assisting victims of domestic violence. PMHA's Administrative Plan and Admissions and Continued Occupancy Plans are written to protect victims of either gender from unfair evictions and program terminations due to the violence perpetrated against them.

PMHA reviews police reports for Public Housing to identify the need to refer residents to counseling and other necessary domestic violence programs. PHMHA will also pursue evictions against residents responsible for domestic violence. For the purposes of discussion here, these activities include victims of dating violence and/or stalking.

Shelter Plus Care: PMHA will continue to apply for renewals of Shelter Plus Care funding for 25 units and is applying, as of this writing, for an additional 25 units of Shelter Plus Care.

Significant Modification to the Annual Plan: PMHA considers the following actions or activities to be significant amendments or substantial deviations from the Annual Plan approved by the Board of the PMHA and Department of Housing and Urban Development.

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

PHAS: PMHA chooses not to be evaluated under the Public Housing Assessment System until required to do so by the Department of Housing and Urban Development.

IV. Long-term MTW Plan

Describe the Agency's long-term vision for the direction of its MTW program, extending through the duration of the MTW Agreement:

Portage Metropolitan Housing Authority seeks to develop itself as a top-quality real estate organization with the mission of integrating community services that will assist non-disabled, non-elderly residents in continual economic improvement leading to either homeownership or private market housing; and for elderly and disabled residents, PMHA seeks to provide decent, safe and affordable housing as a matter of choice for each household.

To accomplish the long-term vision, PMHA seeks to continual improvement in streamlining the delivery of housing to low-income families and individuals through improvements in efficiency and effectiveness within its own resources offered by the Federal Government, by developing new, non-governmental sources of funding that will assist in achieving the vision and mission of the housing authority, and through cooperation and collaboration with community partners to leverage resources and strengths to better housing and living conditions for all persons living with Portage County, Ohio.

In this effort, Moving to Work is expected to remain a critical element of achieving these goals. PMHA is committed to developing a rent calculation system that is easier to administer and understand without compromising the agency's commitment to the integrity of federal funds. In addition, PMHA envisions a rent system that remains affordable to low-income households, but also provides incentive and encouragement to people working to the best of their abilities to improve themselves.

Also, the Moving to Work vision includes removing barriers to rational property management decisions, allowing the agency to administer its real estate inventory with solutions appropriate to the mission. What works in Windham or Ravenna, Ohio may not be the same solution for Cleveland, Ohio or Washington, DC. Local, informed decision-making has brought PMHA to the high performer status it has earned under HUD evaluation to this day; PMHA seeks to provide one example of "how to" that might serve as an example for other housing authorities in finding solutions. PMHA does not seek to provide THE example because the agency is committed to the value that local decision-making will free the creativity of housing authority boards and staffs throughout the nation.

V. Proposed MTW Activities: HUD Approval Requested

Housing Choice Voucher Program

1. Time Limits

(if approved, activity number HCV-6)

Describe Proposed MTW Activity: Portage Metropolitan Housing Authority will establish time limits for participation in the Housing Choice Voucher Program. These time limits will consist of a three year period for new participants following the establishment of an implementation date (planned for February 1, 2012); for existing voucher holders, the three-year time period would begin with their next annual recertification taking effect on or after May 1, 2012. At the end of the time limit period, the family would be terminated from assistance, and be allowed to re-apply immediately to the Housing Choice Voucher Program, for placement according to existing wait list preferences.

Extensions of the designated time would be made available for households that report employment income of the equivalent of 20 hours per week at the established Ohio minimum wage, which in 2011 is a gross monthly wage of \$592. Also the family may participate in a PMHA-approved educational or training program or community service activities at a comparable 20-hours per week. Each month of qualified activity will extend the household by an additional month.

Exemptions of the time limit will be extended to individuals who are age 62 or older, and to persons who have verified disabilities. For households considered elderly or disabled the elderly or disabled members are exempt from the time limit. However, if one or more adults 18 years old or older and not disabled or elderly live in the household, those members will be subject to the 20-hour requirement described above. The failure to comply by covered individuals in an elderly household would result in the removal of the covered individuals only; and the household could be re-issued a voucher based on the new family size if applicable. Live-in aides are not considered part of the household and as a result will not be subjected to the time limit requirements; they also retain no "rights" to the voucher assistance should the household terminate assistance for some reason. A three-person hardship committee would be established to rule on extension-covered activities as well as applications for hardship consideration related to potential reporting issues. An example could be a household that failed to report employment for an extended period of time, and then attempted to get their time credited for the unreported period. The hardship policy will not permit an extension of time under this policy. Family members may document a categorical exemption at any time during their residency. PMHA will conduct a review at least annually of the exemption categories to determine their equitability as well as consistency with the goals of the housing authority and Portage County community.

Describe How Each Proposed Activity Relates to at Least One of the Three Statutory Objectives: PMHA expects this activity to promote resident employment and self sufficiency activity by program participants.

Identify and discuss the anticipated impact of the proposed MTW activity: PMHA expects that implementation of this activity would better encourage work and self-

sufficiency activity by individuals capable of such activity within the Housing Choice Voucher Program, than existing rent reform activities. Based on previous experiences in Moving to Work as well as examination of existing housing research, having and maintaining the voucher assistance has greater prospect of promoting work activity than some sort of income disregard. Households that have unreported employment income will also have much greater incentive to report said income, as failure to do so will result in an shortening of the voucher eligibility time.

Describe baselines, proposed benchmarks and metrics to assess outcomes, including anticipated schedules: Assuming approval for January 1, 2012, PMHA would anticipate implementing for new participants upon entry into the program and the signing of the lease and HAP contract. For current participants, the most effective implementation for administrative purposes would be a schedule based on their annual recertification dates, so that by the end of 2012, the only participants not on the three-year schedule would be those whose first annual recert is effective in the first quarter of the year. The reason for this is that the administrative work is done ahead and would not mandate staff re-doing work for the official implementation of the time limits.

Statutory Objective	Anticipated Impacts	Metric	Baseline	Benchmark	Outcome
Resident Self Sufficiency	Increased number of households reporting employment	Number of households reporting employment at a qualifying level.	Approximately 310 households employed at qualifying level	370 households are anticipated to be reporting employment at a qualifying level.	Actual number of households reporting employment at a qualifying level.
Resident Self Sufficiency	Increased number of households reporting activity in training and education	Number of household reporting education and training activities	Other than FSS Program participants, there is no activity to gather this data currently. PMHA estimates 50 households.	150 households are anticipated to be reporting participating in training and education activities meant to lead to self sufficiency	Actual number of households reporting training and education activities.
Resident Self Sufficiency	Increased number of households losing assistance	Number of households losing housing assistance as a result of time limits	Zero families are subject to losing housing assistance due to time limits; there are no time limits to Housing Choice	No households will lose housing due to time limits in 2012. The three year time limit could possibly begin causing families to lose aid in	Actual number of households determined to have lost housing assistance due to time limits.

			Voucher assistance currently	2015 (three years from the 2012 implementation)	
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PMHA plans to also develop an exit survey for participants for use in 2015 when the first possible time limit departures are imminent, as well as develop a feedback mechanism (focus groups/landlord advisory meetings/mail survey) as to the impact on landlords' participation in the program with tenants. This system will be developed and given a test run in 2013, in anticipation of families approaching the final 12 months of eligibility (assuming no effort has been made in time-extending activity).

Describe the data collection process and the proposed metrics the Agency will use to measure how this activity will achieve one or more of the MTW statutory objectives: PMHA 50058 data through the Yardi software system should adequately provide the information needed to track employment and income changes among the universe of participants.

Cite Authorizations in Attachment C that give the Agency the flexibility to conduct the activity: Attachment C, Section D.2.d., The Agency is authorized to implement term limits for HCV units designated as part of the MTW demonstration, waiving certain provisions of Sections 8(o)(7) and 8(o)(13)(F)-(G) of the 1937 US Housing Act and 24 CFR 982 Subpart L and 983 Subpart E as necessary to implement the Agency's Annual MTW Plan. If approved, will also requires use of authorizations under Attachment C, Section D.1.a., and Attachment C, Section D.1.b., regarding the term and content of Housing Assistant contracts to owners during the term of the MTW demonstration and determining the length of the lease period when vouchers expire.

2. *Capping Utility Reimbursement Checks to the Amounts Established Through the Public Utilities Commission's Percentage of Income Payment Plan Plus (PIPP Plus) Program*

(if approved, activity number HCV-7)

Describe Proposed MTW Activity: Portage Metropolitan Housing Authority will cap the amount of utility allowance payments for electricity and natural gas sent to participants families to the amounts established by the Ohio Public Utilities Commission's Percentage of Income Payment Plan Plus Program. As of this writing, those amounts would be \$10 or 6% of gross monthly household income each month, whichever is greater, for natural gas and electricity each (i.e, for units with tenant-paid natural gas and electric, a total of \$20 or 12% of household income). For units all-electric units, the monthly payment under PIPP Plus is \$10 or 10% of gross monthly income, whichever is greater.

Under current program rules, an assisted household receives utility allowances based on calculations meant to fully pay the utilities for that household and the unit it has selected. However, at the same time, that same family is eligible to apply at the local energy assistance program provider for participation in PIPP Plus. PIPP Plus requires no deposits to participate and establishes an affordable utility payment for the household based on their annual gross income, as long as their household income is at or below 150% of the federal poverty level. To put PIPP Plus eligibility into context, PMHA provides the following table:

Size of Household	Extremely Low Income	Very Low Income	PIPP Plus (150% of Federal Poverty)
1 Person	\$14,000	\$23,300	\$16,245
2 Persons	\$16,000	\$26,600	\$21,885
3 Persons	\$18,000	\$29,950	\$27,465
4 Persons	\$19,950	\$33,250	\$33,075
5 Persons	\$21,550	\$35,950	\$38,685
6 Persons	\$23,150	\$38,600	\$44,295

The vast majority (over 75%) of all participants will be extremely low income households and qualify for PIPP Plus participation. Additionally, the PIPP Plus income levels are set at a level in which 30% of monthly income for the PIPP Plus maximum would be \$406 for a 1 person household. At that level of Total Tenant Payment, there is no possibility that someone would be receiving a utility allowance from the housing authority. The TTP would be even higher for larger families, further reducing the likelihood of getting a utility allowance check from the housing authority.

The fore-runner of PIPP Plus had been in effect for more than 20 years. It was (as is PIPP Plus) an extended payment arrangement that requires regulated gas and electric companies to accept payments based on a percentage of the household income. Both programs are authorized as a part of the Universal Service Fund program enabled by Substitute Senate Bill 3, which also directs the Office of Community Services to administer the PIPP for electricity customers. To be eligible for the PIPP Plus program, a customer must receive his or her primary or secondary heat source from a company regulated by the Public Utilities Commission of Ohio (PUCO), must have a total household income which is at or below 150 percent of

the federal poverty level, and must apply for all energy assistance programs for which he or she is eligible. The program is funded by adding fees to conventional utility consumers, and would require a change in state law (as opposed to an appropriation decision) to end the program. If the program were to be ended, PMHA would most likely cease this MTW feature or determine if a replacement program would serve the same purpose.

If the household makes their PIPP Plus payments are made on-time and in-full, customers earn an incentive credit and an arrearage credit. Each time they pay their required monthly payment on-time and in-full, they no longer owe the rest of that month's billed amount. They also receive a 1/24th credit towards any old debt. If they make full, on-time payments for 24 straight months, all arrearages for the family's utilities are eliminated.

In example form, a family may report \$0 gross household income to the housing authority. Besides paying full rent on behalf of the family, the housing authority sends a check for the tenant-paid utility amounts as scheduled. For discussion purposes, assume this number is \$137 per month. However, the family's actual financial burden for utilities through PIPP Plus would be only at most \$20 for natural gas and electric (\$10 or 6% of gross household income for each utility). Thus, in this example, the household receives \$117 more than needed to provide and maintain utilities for the household, regardless of the amount of the utility used by the family. This surplus is easily converted into non-housing use. Additionally, the very existence of the PIPP Plus program eliminates any penalty for uncontrolled utility usage, as the household bill is set at a percentage of income and is unrelated to the amount of the utility used, arguably further benefitting the household. By capping the utility allowance check issued and leveraging other resources available through PIPP Plus, the housing authority cuts HAP costs overall and per unit, allowing the housing authority either add units to the program for the same dollars and/or broaden the self sufficiency efforts and resources available to promote work and self improvement, while making no detrimental impact to the household's housing and utility cost burden.

PMHA will establish a hardship policy that will permit review of data provided to PIPP Plus to determine if a review of income considered by PIPP Plus leads to a higher income than would be calculated by the housing authority (inclusion of income by PIPP Plus that is excluded by HUD and PMHA). No other hardship exemptions from this policy are expected. PMHA will be prepared to report on any hardship requests under this policy.

Describe How Each Proposed Activity Relates to at Least One of the Three Statutory Objectives: PMHA expects this activity to reduce the cost of program activity and federal expenditures, since the PIPP Plus program is funded by fees charged to existing utility consumers.

Identify and discuss the anticipated impact of the proposed MTW activity: PMHA expects that implementation of this activity would reduce the amount of HAP per household expended with no detrimental impact on household housing expenses.

Describe baselines, proposed benchmarks and metrics to assess outcomes, including anticipated schedules: Assuming approval for January 1, 2012, PMHA would anticipate implementing the utility allowance check cap by April 2012. This would permit time for families to enroll for PIPP Plus, become qualified and work through the verification process for PMHA.

Statutory Objective	Anticipated Impacts	Metric	Baseline	Benchmark	Outcome
Reduce federal expenditures for assisted housing	Decreased amount of utility allowances paid by PMHA	Amount of utility allowances paid by PMHA	In 2011, \$32,000 per month is paid in utility allowance checks	The expected post-implementation amount of utility allowance checks would be \$10,658 per month.	Reduce by at least 50% of utility allowance payments that are or can be duplicated by non-federal sources.

Describe the data collection process and the proposed metrics the Agency will use to measure how this activity will achieve one or more of the MTW statutory objectives: PMHA will maintain data from 50058 and tenant files to track the outcomes and metrics for the activity.

Cite Authorizations in Attachment C that give the Agency the flexibility to conduct the activity: Attachment C, Section 2.a., waiving 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 US Housing Act and 24 CFR 982.508, 982.503 and 982.518 as necessary.

3. *Transitional Housing Vouchers*

(if approved, activity number HCV-8)

Describe Proposed MTW Activity: Portage Metropolitan Housing Authority will establish a sub-set of up to 42 housing choice vouchers that will be assigned a one-year time limit for participation along with the provision of supportive services. In the first year of authorization, PMHA would expect approximately 4 families to be issued a transitional housing voucher out of the possible 42. This would be the beginning of PMHA and its non-profit partner transitioning from a site-based transitional housing model, to a housing-in-place model now preferred by HUD's homelessness programs. As the years progress, PMHA would expect the number of vouchers being used at any one time to fluctuate from 20 to as many as the 42 requested, as admissions to the Renaissance Place public housing/transitional housing program go from one year of service-enriched housing to permanent residents of that property. This request for new activity coincides with the need to adapt Activity PH-9 described below. The adaptation is being requested because federal and state funding sources have de-emphasized two-year transitional housing in favor of permanent housing. However, funding remains in place for transitional services, while other metrics penalize entire counties for moving homeless persons out of

homelessness through the transitional housing method. The request for establishing a transitional housing method would allow Portage County agencies to tap into the remaining few resources for transitional housing services, while helping transition the existing project-based transitional housing program in PMHA public housing into a permanent supportive housing project. This will maintain existing resources and allow PMHA and its providers access to new resources for permanent supportive housing.

Families that participate with transitional housing vouchers would have a simple one-year voucher term, with no extension. If there is other housing assistance that becomes available (regular HCV or Public Housing) through PMHA, they could convert their assistance to that program. If the family does not obtain other assistance through PMHA by the end of the year term, the assistance would end at that time. They would be allowed to remain on the regular voucher and public housing waiting lists, and could transition to those programs at any time they become eligible, freeing up the one of the transitional vouchers for another homeless family.

Describe How Each Proposed Activity Relates to at Least One of the Three Statutory Objectives: PMHA expects this activity to promote and increase housing choice.

Identify and discuss the anticipated impact of the proposed MTW activity: This activity would allow the housing authority to re-position existing project-based transitional housing in its public housing inventory into permanent supportive housing, while maintaining a transitional housing option in the county as a niche program as needed.

Describe baselines, proposed benchmarks and metrics to assess outcomes, including anticipated schedules: Assuming approval for January 1, 2012, PMHA would work with the supportive services provider to begin transitioning their service plans from a project-based model to a tenant-based model. As units in Public Housing convert from transitional to permanent supportive housing, vouchers may be needed to maintain transitional housing as a choice.

Statutory Objective	Anticipated Impacts	Metric	Baseline	Benchmark	Outcome
Increase Housing Choice	Increase the number of permanent supportive housing in Public Housing	Number of families in Public Housing-based permanent supportive housing	0 families are in Public Housing-based permanent supportive housing.	15 families will be classified as permanent supportive housing by the end of 2012.	Actual number of households living in permanent supportive housing.
Increase Housing Choice	Converting transitional housing from a project-	Number of families using transitional housing vouchers	0 families are using transitional housing vouchers	4 families will be using tenant-based assistance for transitional	Actual number of households using tenant-based aid for transitional

	based to a voucher-based form of assistance, allowing for improved choice in housing.			housing by the end of 2012	housing.
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Describe the data collection process and the proposed metrics the Agency will use to measure how this activity will achieve one or more of the MTW statutory objectives: PMHA will maintain records through tenant file documentation and 50058 electronic files to measure the results and outcomes of this activity.

Cite Authorizations in Attachment C that give the Agency the flexibility to conduct the activity: Attachment C, Section D.2.d., The Agency is authorized to implement term limits for HCV units designated as part of the MTW demonstration, waiving certain provisions of Sections 8(o)(7) and 8(o)(13)(F)-(G) of the 1937 US Housing Act and 24 CFR 982 Subpart L and 983 Subpart E as necessary to implement the Agency's Annual MTW Plan. If approved, will also requires use of authorizations under Attachment C, Section D.1.a., and Attachment C, Section D.1.b., regarding the term and content of Housing Assistant contracts to owners during the term of the MTW demonstration and determining the length of the lease period when vouchers expire.

VI. Ongoing MTW Activities: HUD Approval Previously Granted

For the following listed activities, this describes the information requested for HUD-50900.

- A: List activities continued from the prior plan year(s); specify the Plan Year in which the activity was first identified and implemented.
- B. Provide an update on the status of the activity.
- C. For the Plan Year, indicate if the Agency anticipates any changes, modifications or additions to Attachment C authorizations
- D. Describe if the Agency is using outside evaluators

HOUSING CHOICE VOUCHERS***HCV-1. Restrict portability moves out of Portage County for the Housing Choice Voucher Program.***

- A. Year Identified and Implemented: 2009
- B. The activity has been implemented and is a part of the “port-out” process for Housing Choice Voucher participants who are seeking to move to communities where payment standards exceed those of Portage Metropolitan Housing Authority, as a means of reducing impact on budgeted resources caused by portability moves outside of Ohio to high-rent communities where the receiving Housing Authority may not absorb the in-coming participant
- C. PMHA anticipates no change or modification to this authorization.
- D. No outside evaluator is being used for this activity

HCV-2. Amend the Homeownership Voucher Program to include households who are presently homeowners and under foreclosure.

- A. Year Identified and Implemented: 2010 (amended from original homeownership program authorization in 1999.)
- B. This activity is in place, awaiting referrals of qualified households. PMHA is seeking additional partners to make referrals, as well as address issues identified with requiring a professional home inspection in addition to an HQS inspection prior to the beginning of assistance. The 1999 Homeownership Program authorized in 1999 had essentially become the same as the Voucher Homeownership Program available to other, non-MTW housing authorities. The foreclosure activity is unique, however.
- C. PMHA does not expect to modify the feature during 2012.
- D. No outside evaluator is being used for this activity.

HCV-3. Initial rent burden cap of 50% of adjusted monthly income.

- A. Year Identified and Implemented: 1999
- B. The activity is an ongoing activity of the PMHA for over a decade. It is a feature that permits the Housing Choice Voucher participant to choose housing that may be more costly than otherwise permitted under HUD rules and the US Housing Act of 1937. No family is required to do so, but for those who can and are willing to adjust family expenditures to reflect desires for housing over other wants and needs.
- C. PMHA does not expect to modify this feature in 2012.
- D. No outside evaluator is being used for this activity.

HCV-4. Project-Based Voucher Program

- A. Year Identified and Implemented: 1999, with additional authorizations granted and implemented in 2009.
- B. The activity underwent significant change, through clarification and amendment, after a HUD audit determined additional authorizations were needed to ensure program success and compliance with all HUD regulations.
- C. This feature will be examined and reviewed to determine if it should be continued and additional units added to the program, or if a more efficient method of promoting supportive permanent housing can be devised.
- D. No outside evaluator is being used for this activity.

HCV-5. Alternative Housing Quality Standards Compliance

- A. Year Identified and Implemented: 2011
- B. The activity was implemented in 2011 as a means of ensuring HQS standards while minimizing the amount of intrusion upon Section 8 landlords and participants through multiple housing inspections by various government entities. PMHA, for one community, as won the contract to conducting ALL municipal rental housing inspections and as a result will continue to provide rental housing inspections for that community regardless of the permission to waive the Section 8 inspection.
- C. PMHA does not expect to modify this feature in 2012.
- D. No outside evaluator is being used for this activity.

PUBLIC HOUSING*PH-1. Escalating Minimum Rent*

- A. Year Identified and Approved by HUD: 2009
- B. The activity was implemented in 2009, and some families are paying a minimum rent of \$50 based on their longevity in Public Housing, others are paying \$25 a month based on their longevity.
- C. This activity was ended in 2011, as its implementation was unwieldy and not beneficial to the goals of the agency and the MTW Demonstration.
- D. No outside evaluator is being used for this activity.

PH-2. Maximum Rent

- A. Year Identified and Approved by HUD: 2009
- B. The activity was implemented in 2009 and several families are now paying the maximum rent. Families paying maximum rent demonstrate greater willingness to remain in Public Housing and to provide stability to PMHA rental communities than under the previous ceiling rents and the pure "income-based" rents.
- C. PMHA will evaluate the amounts used for the Maximum Rent feature, but it is not changing the policy or philosophy behind the activity.
- D. No outside evaluator is being used for this activity.

PH-3. Elderly and Disabled Rent Recertifications Biennially

- A. Year Identified and Approved by HUD: 2000
- B. The activity has been implemented since 2000, and provides both administrative relief to PMHA and additional convenience to individuals whose incomes are relatively fixed, and typically only increase by a minor amount each year. By

verifying income and adjusting rents upward accordingly, PMHA does sacrifice some income, but at the relief of office time to verify minimal changes. All affected households can choose to be certified annually, but will be assessed the appropriate rent those calculations determine.

- C. PMHA does not intend to change this policy.
- D. No outside evaluator is being used for this activity.

PH-4. Change in Employment Income

- A. Year Identified and Approved by HUD: 2009
- B. The activity permits relatively small changes in income, which can occur frequently, to have no effect on rental amounts. Rents are adjusted at the next annual re-certification rather than at each change event. It was implemented in 2009
- C. PMHA does not intend a change in this policy for 2012.
- D. No outside evaluator is being used for this activity.

PH-5. Rent Adjustment for Income Decreases

- A. Year Identified and Approved by HUD: 2009
- B. The activity was implemented in 2009, and has reduced administrative burden by not making adjustments for changes in rents when a decrease in income is of less than 30 day duration or is of less than \$1,000 in value.
- C. PMHA does not intend a change in this policy for 2012.
- D. No outside evaluator is being used for this activity.

PH-6. Overall Percentage of Income Amounts for Rent Calculations

- A. Year Identified and Approved by HUD: 2009
- B. This activity is in the midst of implementation. The purpose is to simplify rent calculations for improved transparency by both residents and PHA staff, as well as saving time. It is being implemented in conjunction with the several of the other rent-setting activities.
- C. This activity will continue. It will be evaluated as it continues to ensure affordability is not compromised.
- D. No outside evaluator is being used for this activity.

PH-7. Eliminate Allowance for Non-Reimbursed Childcare Expenses

- A. Year Identified and Approved by HUD:
- B. This activity is intertwined as part of the implementation described in #6 above, and is intended to simplify the rent calculation process.
- C. This activity will continue. It will be evaluated as it continues to ensure affordability is not compromised.
- D. No outside evaluator is being used for this activity.

PH-8. Deduction for Elderly or Disabled Adults

- A. Year Identified and Approved by HUD: 2009
- B. The amount has not been changed as of this writing. It may be changed by end 2011. This increase will provide some rent relief and was originally considered to offset a change in the medical deductions.
- C. It is unclear if this activity will be implemented in 2011, as an appropriate solution to the issue of verifying medical deductions that maintains affordability

for the most vulnerable tenants while eliminating verifications in a responsible manner has not yet been determined..

- D. No outside evaluator is being used for this activity.

PH-9. Providing Transitional Housing

- A. Year Identified and Approved by HUD: 1999
- B. This activity was implemented under local waivers granted by HUD prior to 1999, and has continued uninterrupted since 1999. This housing provides a critical niche in the housing continuum for Portage County. MTW implementation is 1999.
- C. PMHA may drop the two-year, transitional nature of the 42 units under this program, and have it become more appropriately termed "permanent supportive housing" in which services will be available to residents for one year, after which they remain in place but without a designated supportive services plan.
- D. No outside evaluator is being used for this activity.

PH-10. PMHA to Operate Group Homes as Public Housing

- A. Year Identified and Approved by HUD: 2009
- B. This activity was implemented several years before approval in 2009 and has been a continuing activity. It became a MTW activity when opinions offered by HUD suggested that a group home as Public Housing was not an allowed activity. This activity permits 8 individuals to continue to reside in a supportive, group home environment. As a result, PMHA considers for MTW purposes this activity to have been implemented in 2009. PMHA has a second property identified as a group home, Walnut House, which houses persons with mental illnesses. This property has 13 units of housing, but PMHA is requesting that this property be permitted to use one of those 13 units as a space for supportive services activities
- C. The Washington Group Home is being transitioned into a group home for young women aging out of foster care and other housing needy situations. Occupancy will include 6 units of housing in the form of 6 single bedroom units, along with 2 units being used for 24-hour supportive services and case management activity to promote individual self-sufficiency. Also, Walnut House has received designation for Neighborhood Networks and other self-sufficiency activities, and PMHA would like to dedicate one unit to support activities as needed. PMHA requests that the three supportive services spaces needed remain eligible for operating subsidy.
- D. No outside evaluator is being used for this activity.

PH-11 Deduction for Absent Child

- A. Year Identified and Approved by HUD: 2009
- B. The policy was not implemented, a decision reached after reviewing the documentation and work efforts needed to verify circumstances involved, the resulting impact on households and further policy discussion relating to desired results on low-income and participating households.
- C. The activity will not be implemented

PUBLIC HOUSING AND HOUSING CHOICE VOUCHER BOTH

B-1. Exclusion of overtime, bonuses and income from bank assets

- A. Year Identified and Implemented: 1999

- B. The activity is part of the overall rent reform initiatives created with the original Moving to Work application and agreement, and has simplified some aspects of rent calculations, as it relates to bank assets. The exclusion of overtime and bonuses has become relatively insignificant in general, as high unemployment rates have diminished opportunities for overtime. Bonuses has become virtually non-existent.
- C. PMHA will end this feature in 2012, in favor of a fully-implemented simplified rent calculation rent reform activity approved by HUD. PMHA will retain the exclusion of bank assets from rent calculations. Impact analysis will take place with the rent reform activity and the hardship policy will be reviewed.
- D. No outside evaluator is being used for this activity.

B-2 *Cap on dependent child deduction*

- A. Year Identified and Implemented: 1999.
- B. The activity continues as part of the overall rent reform activities of 1999. It has been unchanged since its inception. Families who have additional children are still provided vouchers at the appropriate size for the family, and thus increases to the family size do lead to more housing subsidy if the family is under-housed.
- C. This feature is not scheduled for change in 2011.
- D. No outside evaluator is being used for this activity.

B-3 *Utility Allowance Payments are used to repay participant debts owed to the Housing Authority.*

- A. Year Identified and Implemented: 2009
- B. The activity has been useful in reducing the administrative burden of sending out utility allowance checks to the same households that the housing authority is pursuing collection actions against, for the repayment of debts owed to the Housing Authority.
- C. For the Public Housing Program, this authorization will remain in use as is for 2012. For the Housing Choice Voucher Program, the Housing Authority will offer participants indebted to PMHA the opportunity to "sign over" utility allowance payments as part of a repayment agreement, but this will not be mandatory if the Proposed Activity 2 (*Capping Utility Reimbursement Checks to the Amounts Established Through the Public Utilities Commission's Percentage of Income Payment Plan Plus (PIPP Plus) Program*) described above is approved for 2012. PMHA will not re-capture utility allowance payments for Housing Choice Voucher participants that owe money to PMHA. By adopting this approach, affected participants will be able to maintain their on-going participation in PIPP Plus.
- D. No outside evaluator is being used for this activity.

B-4 *Pro-ration of the utility allowance schedule up to the percentage of pro-ration of funding as established by HUD due to appropriations.*

- A. Year Identified and Approved by HUD: 2009.
- B. The activity has not been implemented. The Housing Authority did not feel the 2011 pro-ration was a significant negative impact on the ability of the agency to serve an appropriate number of families.
- C. There is no change requested for this authorization. Utilization of this authority is dependent on the results of HUD appropriations by Congress. If HUD authorization is granted for Proposed Activity 2 (*Capping Utility Reimbursement Checks to the Amounts Established Through the Public Utilities Commission's Percentage of Income Payment Plan Plus (PIPP Plus) Program*), PMHA

anticipates that the authorization for B-4 will be unused for the Housing Choice Voucher Program. PMHA has not requested applying the Capped Utility Reimbursement feature to the Public Housing Program, and the B-4 authorization may still be used.

- D. No outside evaluator is being used for this activity.

B-5. *Single Fund Budgeting with Full Flexibility for Eligible Funds*

- A. Year Identified and Approved by HUD: 2009
- B. The activity is used in very limited ways in 2011, with funds used to co-fund family self-sufficiency/homeownership coordination, and the use of Capital funds to provide a minimal level of supportive service activity.
- C. There is no change requested for this authorization.
- D. No outside evaluator is being used for this activity.

B-6 *Income verifications conducted for approved government programs may be substituted for PMHA income verifications if performed within the previous 90 days.*

- A. Year Identified and Approved by HUD: 2009
- B. The activity was not implemented in 2011, postponed during 2011 as the TANF agency went through significant personnel changes within both management and personnel due to retirements and other turnover as well as personnel cuts caused by budgetary reasons.
- C. There is no change requested for this authorization. Whether the policy will be able to be implemented in 2012 is questionable, but the collaboration and activities involved in the PIPP Plus cap on utility allowance checks may open new opportunities as far as sharing the income verifications involved with that program.
- D. No outside evaluator is being used for this activity.

VII. Sources and Uses of Funding

A. List planned sources (Operating, Capital, HCV) and uses of MTW funds.

Portage Metropolitan Housing Authority anticipates receiving funds from the following HUD sources during 2012 for MTW activities:

- Public Housing Operating Subsidy to be used for conventional Public Housing operations: \$883,321, pending federal appropriations.
- Housing Choice Voucher Housing Assistance Payments to be used for lease-up and homeownership activities: \$9,693,706, pending federal appropriations.
- Capital Fund Formula Grant for approved modernization and administration expenses: \$395,245, pending federal appropriations.

Source of MTW Funds	Amount
HUD Operating Subsidy	\$883,321
HUD Capital Funds	\$395,245
HUD Housing Choice Voucher	\$9,693,706
Tenant Rents	\$527,555
TOTAL	\$11,499,827

Uses of Funds	Amount
Administrative	\$1,400,745
Tenant Services	\$52,555
Utilities	\$258,956
Maintenance	\$568,258
Insurance	\$128,643
HAP to Landlords	\$8,724,336
TOTAL	\$11,133,493

B. List planned sources and uses of State or local funds.

Portage Metropolitan Housing Authority plans to receive funding from the following sources of state and local funding:

- Shelter Plus Care, funds provided to fund rental housing assistance for disabled homeless persons. Those housed also receive mental health services addressing stability, healing and self sufficiency supportive services. PMHA anticipates \$184,380 for the 25 units of tenant-based assistance as a renewal of an existing grant. PMHA has also been given preliminary approval to apply for an additional 25 units of tenant-based assistance for a 5-year period worth \$873,000 for the entirety of the grant.
- City of Kent grant funds (if available and awarded in 2012) would promote security and community improvements at all PMHA-owned developments in the city limits. PMHA would expect to apply for \$10,000 in 2012.

C. List planned sources and uses of the COCC.

<u>Source</u>	<u>Amount</u>
Capital Grants	\$49,266
Management Fee	\$169,411
Asset Management Fee	\$36,600
Bookkeeping Fee	\$18,748
TOTAL	\$274,025

<u>Source</u>	<u>Amount</u>
Administrative Expenses	\$222,391
Maintenance Expenses	\$12,458
Utility Expenses	\$28,433
Insurance	\$4,256
Other	\$378
TOTAL	\$267,916

D. If using a cost allocation or fee for service approach that differs from 1937 Act requirements, describe the deviations and the reasons therefore.

Not applicable.

E. List or describe use of single-fund flexibility, if applicable, describe uses across traditional program lines or special circumstances in support of an MTW activity.

PMHA is not currently planning to use Single-Fund flexibility during 2012. It considers this flexibility valuable, however, as a tool to allow the housing authority to address potential shortfalls in funding caused by Congressional appropriations decisions, particularly in light of initial draft bills from both the House of Representatives and the US Senate indicating substantial shortfalls in funding for Public Housing Operating and Capital Fund purposes.

F. List reserve balances at the beginning of the Plan year.

PMHA opts not to provide this information in the Annual Plan.

G. In Plan Appendix, provide planned sources and uses by AMP

PMHA opts not to provide this information in the Annual Plan.

VIII. Administrative**A. Resolution signed by the Board of Commissioners adopting the Annual MTW Plan Certification of Compliance.**

The resolution is attached.

B. Description of any planned or ongoing Agency-directed evaluations of the demonstration.

Portage Metropolitan Housing Authority has no planned or on-going external evaluations of the Moving to Work Demonstration. Romaine Chritton, Housing and Special Projects Manager, and Pamela Nation, Section 8 Program Manager, compile and analyze data generated for and by the agency to assess the impacts of the activities and results of MTW policy choices.

Primary data used for this assessment is primarily income amounts and sources, rents and HAP assistance data, along with information related to time and activity of staff. PMHA has a good amount of historic background data from previous years' participation in the demonstration, although much of it is in paper form, making it burdensome for additional compilation. Changes in software have improved the ability to collect and analyze data.

Capital Fund 2011

Annual Statement/Performance and Evaluation Report
Capital Fund Program, Capital Fund Program Replacement Housing Factor and
Capital Fund Financing Program

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 4/30/2011

Part I: Summary PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number Capital Fund Program Grant No: OH12P031501-12 Date of CFFP: _____		FFY of Grant: 2012 FFY of Grant Approval:	
Type of Grant <input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Performance and Evaluation Report or Period Ending: _____					
<input type="checkbox"/> Reserve for Disasters/Emergencies		Revised Annual Statement (revision no:) Final Performance and Evaluation Report			
Line	Summary by Development Account	Total Estimated cost		Total Actual Cost 1	
		Original	Revised 2	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations (may not exceed 20% of line 20)	104,000.00	77,688.00	0.00	0.00
3	1408 Management Improvements	50,910.00	50,910.00	0.00	0.00
4	1410 Administration (may not exceed 10% of line 20)	52,000.00	38,844.00	0.00	0.00
5	1411 Audit	0.00	0.00	0.00	0.00
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00
7	1430 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	88,790.00	20,500.00	0.00	0.00
10	1460 Dwelling Structures	195,500.00	195,500.00	0.00	0.00
11	1465 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	1475 Non-dwelling Equipment	0.00	0.00	0.00	0.00
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1492 Moving to Work Demonstration	23,912.00	5,000.00	0.00	0.00
16	1495.1 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 PHA	0.00	0.00	0.00	0.00
18ba	9000 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)	3,888.00	0.00	0.00	0.00
20	Amount of Annual Grant: (sum of lines 2 - 19)	520,000.00	388,442.00	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	9,000.00	0.00	0.00	0.00
23	Amount of line 20 Related to Security - Soft Costs	2,500.00	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	59,500.00			
Signature of Executive Director		Date		Signature of Public Housing Director	
				Date	

- 1 To be completed for the Performance and Evaluation Report.
2 To be completed for the Performance and Evaluation Report or a Revised Annual Statement
3 PHAs with under 250 units in management may use 100% of CFP Grants for operations.
4 RHF funds shall be included here.

Annual Statement/Performance and Evaluation Report
 Capital Fund Program, Capital Fund Program Replacement Housing Factor and
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226
 Expires 4/30/2011

Part II: Supporting Pages

PHA Name:		Grant Type and Number				CFFP (Yes/No):		Federal FFY of Grant:	
Portage Metropolitan Housing Authority		Capital Fund Program Grant No: OH12P031501-12				2012			
		Replacement Housing Factor Grant No:							
Development Number Name/PHA - Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Costs		Total Actual Cost		Status of Work	
				Original	Revised 1	Funds Obligated 2	Funds Expended 2		
OH31000001 - EAST	Operations	1406		52,000.00	38,844.00				
OH31000002 - WEST	Operations	1406		52,000.00	38,844.00				
	Management Improvements								
OH31000001 - EAST	Resident Security	1408		1,250.00	1,250.00				
OH31000002 - WEST	Resident Security	1408		1,250.00	1,250.00				
OH31000001 - EAST	Coordinator Drug Elimination	1408		24,205.00	24,205.00				
OH31000002 - WEST	Coordinator Drug Elimination	1408		24,205.00	24,205.00				
	Administration								
OH31000001 - EAST	Salaries/Fringe Benefits	1410		26,000.00	38,844.00				
OH31000002 - WEST	Salaries/Fringe Benefits	1410		26,000.00					
OH31000001 - EAST	Advertising for Bids	1410							
OH31000002 - WEST	Advertising for Bids	1410							
	Non-dwelling Equipment								
OH31000001 - EAST		1475							
OH31000002 - WEST		1475							
	Fees and Costs	1430							
	Contingency	1502		3,888.00	0.00				

- ¹ To be completed for the Performance and Evaluation Report.
² To be completed for the Performance and Evaluation Report or a Revised Annual Statement
³ PHAs with under 250 units in management may use 100% of CFP Grants for operations.
⁴ RHF funds shall be included here.

Portage Metropolitan Housing Authority

2012 Annual MTW Plan

Annual Statement/Performance and Evaluation Report
Capital Fund Program, Capital Fund Program Replacement Housing Factor and
Capital Fund Financing Program

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 4/30/2011

Part II: Supporting Pages

PHA Name: Portage Metropolitan Housing Authority		Grant Type and Number CFFP (Yes/No): Capital Fund Program Grant No: OH12P031501-12 Replacement Housing Factor Grant No:				Federal FFY of Grant: 2012		
Development Number Name/PHA - Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Costs		Total Actual Cost		Status of Work
	OH31000001 - EAST SIDE			Original	Revised ¹	Funds Obligated ²	Funds Expended ²	
OH3100P Community Estates								
6443 - 6499 S. Fairfield St.	Replacement of Flooring	1460	all	95,500.00	95,500.00			
Ravenna, Ohio 44266	Repair Drainage (6466-6468)	1450	as needed	15,000.00	20,500.00			
	Concrete pad / sidewalks	1450	as needed	12,645.00	0.00			
	Landscaping	1450	as needed	15,000.00	0.00			
Eastowne Manor								
777 Eastowne Drive	Install ADA Bathing System	1460	as needed					
Ravenna, Ohio 44266	ADA Commode	1460	as needed	9,000.00	8,000.00			
	31000002 - WEST SIDE							
OH3100P Athena Gardens								
1645 - 1693 Athena Drive	Replacement of Flooring	1460	all	92,000.00	92,000.00			
Kent, Ohio 44240	Concrete Center Islands	1450	all	15,000.00	0.00			
	Concrete pads / sidewalks	1450	as needed	16,145.00	0.00			
	Landscaping	1450	as needed	15,000.00	0.00			

¹ To be completed for the Performance and Evaluation Report.

² To be completed for the Performance and Evaluation Report or a Revised Annual Statement

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

⁴ RHF funds shall be included here.

Capital Fund Program - Five -Year Action Plan

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

Part I: Summary

Portage Metropolitan Housing Authority - OH31

City of Kent - 44240, City of Ravenna - 44266
and Portage County, Ohio

X Original 5-Year Plan

___ Revision No:

A.	Development Number and Name	Work Statement for Year 1 FFY: 2012	Work Statement for Year 1 FFY: 2013	Work Statement for Year 1 FFY: 2014	Work Statement for Year 1 FFY: 2015	Work Statement for Year 1 FFY: 2016
B.	Physical Improvements Subtotal	Annual Statement	\$ 224,386.00	\$ 223,410.00	\$ 222,180.00	\$ 224,110.00
C.	Management Improvements		42,524.00	43,500.00	44,730.00	42,800.00
D.	PHA-Wide Non-dwelling Structures and Equipment		0.00	0.00	0.00	0.00
E.	Administration		38,844.00	38,844.00	38,844.00	38,844.00
F.	Other		5,000.00	5,000.00	5,000.00	5,000.00
G.	Operations		77,688.00	77,688.00	77,688.00	77,688.00
H.	Demolition		0.00	0.00	0.00	0.00
I.	Development		0.00	0.00	0.00	0.00
J.	Capital Fund Financing-Debt Service		0.00	0.00	0.00	0.00
K.	Total CFP Funds		\$ 388,442.00	\$ 388,442.00	\$ 388,442.00	\$ 388,442.00
L.	Total Non-CFP Funds		0.00	0.00	0.00	0.00
M.	Grand Total		\$ 388,442.00	\$ 388,442.00	\$ 388,442.00	\$ 388,442.00

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

Work Statement for Year 1 FFY 2012	Work Statement for Year: 2 FFY: 2013			Work Statement for Year: 2 FFY: 2013		
	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost
See Annual Statement	OH31000001 - EAST AMP			OH31000002 - WEST AMP		
	OH31-002P Scattered Sites			OH31-009P Heritage Knolls		
	Rehab Units - Marks	4 units	88,188.00	Siding/Insulation/Gutters/Down Spouts/Shutters/Doors		125,000.00
	Replace Furnaces & Ductwork - Marks	4 units	11,198.00	OH31-009P Heritage Knolls		
	Concrete Work	4 units	0.00	Replace Roofs/Gutters/Down Spouts	All	0.00
	OH31-004P Eastowne Manor					
	Install ADA Shower/Bath/Commode	1	0.00			
	Subtotal of Estimated Costs		\$ 99,386.00	Subtotal of Estimated Costs		\$ 125,000.00

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

Work Statement for Year 1 FFY 2011	Work Statement for Year: 3 FFY: 2014			Work Statement for Year: 3 FFY: 2014		
	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost
Annual Statement	OH31000001 - EAST AMP			OH31000002 - WEST AMP		
	OH31-001P Community Estates			OH31-001P Athena Gardens		
	Replace Roofs/Gutters/Downs	All	56,410.00	Replace Roofs/Gutters/Downs	All	0.00
				OH31-005P Townsquare Villas Siding/Insulation/Gutters/Down		
	OH31-004P Eastowne Manor			Spouts/Shutters	All	122,000.00
	Install ADA Shower/Bath/Commode	1	1,000.00	Replace Roofs	All	44,000.00
	OH31-010P Ravenna Single Family					
	Replace Appliances & Range Hoods	All	0.00			
	Subtotal of Estimated Costs		\$ 57,410.00	Subtotal of Estimated Costs		\$ 166,000.00

Capital Fund Program - Five -Year Action Plan

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

Part II: Supporting Pages - Physical Needs Work Statement(s)

Work Statement for Year 1 FFY 2011	Work Statement for Year: 4 FFY: 2015			Work Statement for Year: 4 FFY: 2015		
	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost
Annual	OH31000001 - EAST AMP			OH31000002 - WEST AMP		
Statement	OH31-015P Renaissance Place					
	Replace Flooring	All	125,500.00			
	Replace Appliances	All	12,180.00			
	OH31-002P Scattered Sites					
	1066 Williams Avenue					
	Interior and Exterior Renovations		75,500.00			
	OH31-004P Eastowne Manor					
	Install ADA Shower/Bath/Commode	1	9,000.00			
	Subtotal of Estimated Costs		\$ 222,180.00	Subtotal of Estimated Costs		\$ -

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Part II: Supporting Pages - Physical Needs Work Statement(s)						
Work Statement for Year 1 FFY 2011	Work Statement for Year: 5 FFY: 2016			Work Statement for Year: 5 FFY: 2016		
	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost
Annual	OH31000001 - EAST AMP			OH31000002 - WEST AMP		
Statement	OH31-002P Scattered Sites			OH31-002P Scattered Sites		
	128 Garden Court, Ravenna			514 Harrist Street, Kent		
	Rehab of unit as needed		18,500.00	Rehab of unit as needed		23,110.00
	3464 & 3466 State Route 183			220, 222 W. Elm Street, Kent		
	Rehab of unit as needed		27,500.00	Rehab of units as needed		22,500.00
	9876 Blanton			226, 228 W. Elm Street, Kent		
	Rehab of unit as needed		21,500.00	Rehab of units as needed		22,500.00
	9899 Blanton			3701 Duffield Street, Brimfield		
	Rehab of unit as needed		21,500.00	Rehab of unit as needed		33,500.00
				1347 Arcadia Road, Brimfield		
				Rehab of unit as needed		33,500.00
	Subtotal of Estimated Costs		\$ 89,000.00	Subtotal of Estimated Costs		\$ 135,110.00

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Part III: Supporting Pages - Management Needs Work Statement(s)

Work Statement for Year 1 FFY 2012	Work Statement for Year: 2 FFY: 2013		Work Statement for Year: 2 FFY: 2013	
	Development Number/Name General Description of Major Work Categories	Estimated Cost	Development Number/Name General Description of Major Work Categories	Estimated Cost
Annual Statement	OH31000001 - EAST AMP		OH31000002 - WEST AMP	
	Resident Security	1,250.00	Resident Security	1,250.00
	Coordinator of Social Service for Drug Elimination	19,524.00	Coordinator of Social Service for Drug Elimination	20,500.00
	Administration Salaries and Fringes	19,422.00	Administration Salaries and Fringes	19,422.00
	Operations	38,844.00	Operations	38,844.00
	Non-Dwelling Equipment - 1475		Non-Dwelling Equipment - 1475	
	Non-Dwelling Structures - 1470		Non-Dwelling Structures - 1470	
	31 - 02 Replace Sheds - 9	6,300.00	31 - 02 Replace Sheds - 9	6,300.00
	Subtotal of Estimated Costs	\$ 85,340.00	Subtotal of Estimated Costs	\$ 86,316.00

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Part III: Supporting Pages - Management Needs Work Statement(s)

Work Statement for Year 1 FFY 2012	Work Statement for Year: 3 FFY: 2014		Work Statement for Year: 3 FFY: 2014	
	Development Number/Name General Description of Major Work Categories	Estimated Cost	Development Number/Name General Description of Major Work Categories	Estimated Cost
Annual Statement	OH31000001 - EAST AMP		OH31000002 - WEST AMP	
	Resident Security	1,250.00	Resident Security	1,250.00
	Coordinator of Social Service for Drug Elimination	20,500.00	Coordinator of Social Service for Drug Elimination	20,500.00
	Administration Salaries and Fringes	19,422.00	Administration Salaries and Fringes	19,422.00
	Operations	38,844.00	Operations	38,844.00
	Subtotal of Estimated Costs	\$ 80,016.00	Subtotal of Estimated Costs	\$ 80,016.00

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Part III: Supporting Pages - Management Needs Work Statement(s)

Work Statement for Year 1 FFY 2012	Work Statement for Year: 4 FFY: 2015		Work Statement for Year: 4 FFY: 2015	
	Development Number/Name General Description of Major Work Categories	Estimated Cost	Development Number/Name General Description of Major Work Categories	Estimated Cost
Annual Statement	OH31000001 - EAST AMP		OH31000002 - WEST AMP	
	Resident Security	1,250.00	Resident Security	1,250.00
	Coordinator of Social Service for Drug Elimination	21,115.00	Coordinator of Social Service for Drug Elimination	21,115.00
	Administration Salaries and Fringes	19,422.00	Administration Salaries and Fringes	19,422.00
	Operations	38,844.00	Operations	38,844.00
	Subtotal of Estimated Costs	\$ 80,631.00	Subtotal of Estimated Costs	\$ 80,631.00

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Part III: Supporting Pages - Management Needs Work Statement(s)

Work Statement for Year 1 FFY 2012	Work Statement for Year: 5 FFY: 2016		Work Statement for Year: 5 FFY: 2016	
	Development Number/Name General Description of Major Work Categories	Estimated Cost	Development Number/Name General Description of Major Work Categories	Estimated Cost
Annual Statement	OH31000001 - EAST AMP		OH31000002 - WEST AMP	
	Resident Security	1,250.00	Resident Security	1,250.00
	Coordinator of Social Service for Drug Elimination	20,150.00	Coordinator of Social Service for Drug Elimination	20,150.00
	Administration Salaries and Fringes	19,422.00	Administration Salaries and Fringes	19,422.00
	Operations	38,844.00	Operations	38,844.00
	Subtotal of Estimated Costs	\$ 79,666.00	Subtotal of Estimated Costs	\$ 79,666.00