

PHA Plans
**Streamlined 5-Year/Annual
Version**

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

OMB No. 2577-0226
(exp 05/31/2006)

This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937 that introduced 5-year and annual PHA Plans. The full PHA plan provides a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission and strategies for serving the needs of low-income and very low-income families. This form allows eligible PHAs to make a streamlined annual Plan submission to HUD consistent with HUD's efforts to provide regulatory relief to certain PHAs. Public reporting burden for this information collection is estimated to average 11.7 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

Privacy Act Notice. The United States Department of Housing and Urban Development, Federal Housing Administration, is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Information in PHA plans is publicly available.

Streamlined 5-Year Plan for Fiscal Years 2005 - 2009

Streamlined Annual Plan for Fiscal Year 2005

NOTE: This PHA Plan template (HUD-50075-SA) is to be completed in accordance with instructions contained in previous Notices PIH 99-33 (HA), 99-51 (HA), 2000-22 (HA), 2000-36 (HA), 2000-43 (HA), 2001-4 (HA), 2001-26 (HA), 2003-7 (HA), and any related notices HUD may subsequently issue. Full reporting for each component listed in the streamlined Annual Plan submitted with the 5-year plan is required.

Streamlined Five-Year PHA Plan

form HUD-50075-SF (04/30/2003)

Agency Identification

PHA Name: Housing Authority of the City of Milwaukee **PHA Number:**
 WI002

PHA Fiscal Year Beginning: (mm/yyyy) 01/2005

PHA Programs Administered:

Public Housing and Section 8	Section 8 Only	Public Housing Only
Number of public housing units:	Number of S8 units:	Number of public housing units:
Number of S8 units:		

PHA Consortia: (check box if submitting a joint PHA Plan and complete table)

Participating PHAs	PHA Code	Program(s) Included in the Consortium	Programs Not in the Consortium	# of Units Each Program
Participating PHA 1:				
Participating PHA 2:				
Participating PHA 3:				

Public Access to Information

Information regarding any activities outlined in this plan can be obtained by contacting:
 (select all that apply)

- Main administrative office of the PHA
- PHA development management offices
- PHA local offices

Display Locations For PHA Plans and Supporting Documents

The PHA Plans and attachments (if any) are available for public inspection at: (select all that apply)

- Main administrative office of the PHA
 - PHA development management offices
 - PHA local offices
 - Main administrative office of the local government
 - Main administrative office of the County government
 - Main administrative office of the State government
 - Public library
 - PHA website
 - Other (list below)
- All development offices and resident organizations have a copy of Agency Plan.
 Supporting documents are available at the main administrative office.

PHA Plan Supporting Documents are available for inspection at: (select all that apply)

- Main business office of the PHA
- PHA development management offices
- Other (list below)

Streamlined Five-Year PHA Plan

PHA Fiscal Years 2005 - 2009

[24 CFR Part 903.12]

A. Mission

State the PHA's mission for serving the needs of low-income, very low income, and extremely low-income families in the PHA's jurisdiction. (select one of the choices below)

The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.

The PHA's mission is: (state mission here)
Provide decent/quality, safe and affordable housing with transition options for those who desire them. "Transition option" is defined as the opportunity for residents to self-determine their interest in, and have access to, housing options that support long-term self-sufficiency.

B. Goals

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD-suggested objectives or their own, PHAs are strongly encouraged to identify quantifiable measures of success in reaching their objectives over the course of the 5 Years.

(Quantifiable measures would include targets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the spaces to the right of or below the stated objectives.

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

PHA Goal: Expand the supply of assisted housing
Objectives:

- Apply for additional rental vouchers:
- Reduce public housing vacancies:
- Leverage private or other public funds to create additional housing opportunities:
- Acquire or build units or developments
- Other (list below)

PHA Goal: Improve the quality of assisted housing
Objectives:

- Improve public housing management: (PHAS score) 93
- Improve voucher management: (SEMAP score) 100
- Increase customer satisfaction:
- Concentrate on efforts to improve specific management functions:

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

Renovate or modernize public housing units:

Demolish or dispose of obsolete public housing:

Provide replacement public housing:

Provide replacement vouchers:

Other: (list below)

PHA Goal: Increase assisted housing choices

Objectives:

Provide voucher mobility counseling:

Conduct outreach efforts to potential voucher landlords

Increase voucher payment standards

Implement voucher homeownership program:

Implement public housing or other homeownership programs:

Implement public housing site-based waiting lists:

Convert public housing to vouchers:

Other: (list below)

Develop new units for homeownership

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

PHA Goal: Provide an improved living environment

Objectives:

Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:

Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:

Implement public housing security improvements:

Designate developments or buildings for particular resident groups (elderly, persons with disabilities)

Other: (list below)

Work to restore HUD funding for activities/services previously funded through PHDEP. Additional pressure for funding for security has been jeopardized by decreases in operating subsidy and HUD Capital Fund.

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

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

Objectives:

Increase the number and percentage of employed persons in assisted families:

Provide or attract supportive services to improve assistance recipients' employability:

Provide or attract supportive services to increase independence for the elderly or

families with disabilities.

Other: (list below)

Enroll additional families in the "Make Your Money Talk" program.

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

PHA Goal: Ensure equal opportunity and affirmatively further fair housing

Objectives:

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

Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:

Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:

Other: (list below)

Other PHA Goals and Objectives: (list below)

- Sell 20 public housing units under the Section 5(h) homeownership program. 12/31/05
- Convert 20 Section 8 clients to homeownership under the Section 8(y) homeownership option. 12/31/05
- Continue the Highland HOPE VI redevelopment project including on-site rental and homeownership unit construction. 12/31/06
- Implement the Scattered Sites HOPE VI redevelopment program including the beginning of demolition of existing units and construction of new single family homes. 12/31/07
- Begin construction related to the Cherry Court redevelopment project. 12/31/06
- Complete the renovation of the VA SRO facility and complete initial occupancy. 7/1/05
- Enroll and graduate 20 families from the "Make Your Money Talk" program. 12/31/05
- Provide 30 educational scholarships. 12/31/05
- Continue construction of Westlawn porches. 12/31/05
- Submit funding applications, demolition/disposition applications and related program applications necessary to support the demolition and revitalization of the Convent Hill public housing development. 12/31/05
- Develop a plan to comply with the asset repositioning requirements of HUD's revised Operating Fund Rule. 12/31/05
- Develop and implement strategies to adjust HACM's Section 8 tenant-based Housing Choice Voucher Program utilization to respond to HUD funding policy. 12/31/05
- Submit a request for waivers necessary to set aside Section 8 Housing Choice Vouchers as project-based assistance in conjunction with the Cherry Court redevelopment program. 12/31/05
- Continue partnerships and MOA's with, and provide appropriate admissions preferences for clients referred to HACM's Section 8 Housing Choice Voucher Program by, META House, The Salvation Army, the Milwaukee Community Services Corps, Milwaukee Public Schools, the Ellsworth Project, Milwaukee Jobs Initiative and the YWCA.

12/31/05

- Continue partnerships and MOA's with, and provide appropriate admissions preferences for low income public housing for clients referred by, the Milwaukee Women's Center, Pathfinders and the Ellsworth Project. 12/31/05
- Continue partnerships with the Dominican Sisters and ACTS for the conversion of obsolete scattered sites public housing units to homeownership. 12/31/05
- Continue to participate in the city's Continuum of Care. 12/31/05
- Maintain "High Performer" status under HUD's public housing and Section 8 program assessment systems. 12/31/05
- Consider policy recommendations related to providing domestic violence preferences for the public housing and Section 8 HCV programs. 12/31/05
- Apply for grants from all potential funding sources to support HACM's public safety, resident education and resident employment programs. 12/31/05
- Establish replacement reserves to assist with the revitalization of Cherry Court and Convent Hill. 12/31/04
- Pursue borrowing funds through the Capital Funds Financing Program. 12/31/05
- Maximize the use of tax credits for the revitalization of Cherry Court by offering the Highland Park highrise, which was approved in 2003 for demolition, as a temporary relocation option for Cherry Court residents. 12/31/06

Streamlined Annual PHA Plan
PHA Fiscal Year 2005
[24 CFR Part 903.12(b)]

Table of Contents

Provide the following table of contents for the streamlined Annual Plan submitted with the Five-Year Plan, including all streamlined plan components, and additional requirements, together with the list of supporting documents available for public inspection.

A. ANNUAL STREAMLINED PHA PLAN COMPONENTS

1. Housing Needs
2. Financial Resources
3. Policies on Eligibility, Selection and Admissions
4. Rent Determination Policies
5. Capital Improvements Needs
6. Demolition and Disposition
7. Homeownership
8. Civil Rights Certifications (included with PHA Certifications of Compliance)
9. Additional Information
 - PHA Progress on Meeting 5-Year Mission and Goals
 - Criteria for Substantial Deviations and Significant Amendments
 - Other Information Requested by HUD
 - Resident Advisory Board Membership and Consultation Process
 - Resident Membership on the PHA Governing Board
 - PHA Statement of Consistency with Consolidated Plan
 - (Reserved)
10. Project-Based Voucher Program
11. Supporting Documents Available for Review
12. FY 2005 Capital Fund Program and Capital Fund Program Replacement Housing Factor, Annual Statement/Performance and Evaluation Report
13. Capital Fund Program 5-Year Action Plan
14. Other (List below, providing name for each item)
 - Admissions and Continued Occupancy Policy
 - Section 8 Administrative Plan
 - CFP One-Five Year Plan
 - 2000 CFP Final Report
 - 2001 CFP Final Report
 - 2002 CFP Final Report
 - 2003 CFP Annual Report 6-30-04
 - 2003 CFP Set-Aside Annual Report 6-30-04
 - 2001 RHF Annual Report 6-30-04
 - 2002 RHF Annual Report 6-30-04
 - 2003 RHF Final Report
 - Organizational Chart
 - Agency Plan Resolution

Public Hearing Notice and Comments
 Resident Advisory Board membership, agendas, minutes

B. SEPARATE HARD COPY SUBMISSIONS TO LOCAL HUD FIELD OFFICE

Form HUD-50077, PHA Certifications of Compliance with the PHA Plans and Related Regulations: Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans;

Certification by State or Local Official of PHA Plan Consistency with Consolidated Plan.

For PHAs APPLYING FOR CAPITAL FUND PROGRAM (CFP) GRANTS:

Form HUD-50070, Certification for a Drug-Free Workplace;

Form HUD-50071, Certification of Payments to Influence Federal Transactions;

Form SF-LLL & SF-LLLa, Disclosure of Lobbying Activities.

Executive Summary (optional)

[903.7(r)]. If desired, provide a brief overview of the contents of the streamlined 5-Year/Annual Plan.

1. Statement of Housing Needs [24 CFR Part 903.12 (b), 903.7(a)]

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

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

Housing Needs of Families on the PHA's Waiting Lists			
Waiting list type: (select one)			
Section 8 tenant-based assistance			
Public Housing (Family)			
Combined Section 8 and Public Housing			
Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	5,111		325
Extremely low income <=30% AMI	4,916	96.2%	
Very low income (>30% but <=50% AMI)	175	3.4%	
Low income (>50% but <80% AMI)	20	.4%	
Families with children	4,403	86.1%	
Elderly families	8	.2%	
Families with Disabilities	700	13.7%	
Race/ethnicity	4,496	88%	
Black			

Race/ethnicity White	571	11.2%	
Race/ethnicity Hispanic	340	6.7%	
Race/ethnicity American Indian	19	.4%	
Race/ethnicity Asian	20	.4%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	513	10%	
2 BR	3,025	59.2%	
3 BR	1,164	22.8%	
4 BR	340	6.7%	
5 BR	58	1.1%	
5+ BR	11	.2%	
Is the waiting list closed (select one)? No Yes			
If yes:			
How long has it been closed (# of months)? 1			
Does the PHA expect to reopen the list in the PHA Plan year? No Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? No Yes			

Housing Needs of Families on the PHA's Waiting Lists			
Waiting list type: (select one)			
Section 8 tenant-based assistance			
Public Housing (Elderly high-rise/disabled/singles)			
Combined Section 8 and Public Housing			
Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	1,213		260
Extremely low income <=30% AMI	1,099	90.6%	
Very low income (>30% but <=50% AMI)	103	8.5%	
Low income (>50% but <80% AMI)	11	.9%	
Families with children	N/A (Designated Housing Plan)		
Elderly families* (*includes near elderly)	292	24%	
Families with Disabilities	394	32.5%	
Families with Singles	527	43.5%	
Race/ethnicity Black	1,000	82.4%	
Race/ethnicity White	202	16.7%	
Race/ethnicity Hispanic	59	4.9%	

Race/ethnicity	2	.2%	
American Indian			
Race/ethnicity	7	.6%	
Asian			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	1,206	99.4%	
2 BR	7	.6%	
3 BR	NA		
4 BR	NA		
5 BR	NA		
5+ BR	NA		
Is the waiting list closed (select one)? No Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? No Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?			
No Yes			

Housing Needs of Families on the PHA's Waiting Lists			
Waiting list type: (select one)			
Section 8 tenant-based assistance			
Public Housing			
Combined Section 8 and Public Housing			
Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	567		250
Extremely low income <=30% AMI	529	93.3%	
Very low income (>30% but <=50% AMI)	38	6.7%	
Low income (>50% but <80% AMI)	0	.0%	
Families with children	400	70.55%	
Elderly families	1	.1%	
Families with Disabilities	1	.1%	
Race/ethnicity	506	89.23%	
Black			
Race/ethnicity	36	6.34%	
White			
Race/ethnicity	20	3.52%	
Hispanic			
Race/ethnicity	5	.91%	
Other			
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			

3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? No Yes			
If yes:			
How long has it been closed (# of months)? 56			
Does the PHA expect to reopen the list in the PHA Plan year? No Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?			
No Yes			

B. Strategy for Addressing Needs

Provide a brief description of the PHA's strategy for addressing the housing needs of families on the PHA's public housing and Section 8 waiting lists **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

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

Select all that apply

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

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

Select all that apply

- Apply for additional section 8 units should they become available
- Leverage affordable housing resources in the community through the creation of mixed - finance housing
- Pursue housing resources other than public housing or Section 8 tenant-based assistance.
- Other: (list below)
- Continue to actively participate in the city's Continuum of Care

Need: Specific Family Types: Families at or below 30% of median

Strategy 1: Target available assistance to families at or below 30 % of AMI

Select all that apply

- Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing
- Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant-based section 8 assistance
- Employ admissions preferences aimed at families with economic hardships
- Adopt rent policies to support and encourage work
- Other: (list below)

Need: Specific Family Types: Families at or below 50% of median

Strategy 1: Target available assistance to families at or below 50% of AMI

Select all that apply

- Employ admissions preferences aimed at families who are working
- Adopt rent policies to support and encourage work
- Other: (list below)
- Administer a preference for placement of families with a broad range of incomes regardless of source.

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

- Seek designation of public housing for the elderly
- Apply for special-purpose vouchers targeted to the elderly, should they become available
- Other: (list below)
- Work with the Continuum of Care to develop more permanent housing opportunities for homeless.
- Continue to work with HUD and HHS on the Interagency Cooperation Agreement and pilot program for assisted living conversion of elderly public housing.

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

- Seek designation of public housing for families with disabilities
- Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing
- Apply for special-purpose vouchers targeted to families with disabilities, should they become available
- Affirmatively market to local non-profit agencies that assist families with disabilities
- Other: (list below)
- Continue to work with Independence First to expand homeownership opportunities for individuals and families with disabilities and work with the Continuum of Care to expand opportunities through partnerships.

Need: Specific Family Types: Races or ethnicities with disproportionate housing needs

Strategy 1: Increase awareness of PHA resources among families of races and ethnicities with disproportionate needs:

Select if applicable

- Affirmatively market to races/ethnicities shown to have disproportionate housing needs
- Other: (list below)

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

- Counsel section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units
- Market the section 8 program to owners outside of areas of poverty /minority concentrations
- Other: (list below)
- Open Section 8 wait list.

Other Housing Needs & Strategies: (list needs and strategies below)

(2) Reasons for Selecting Strategies

Of the factors listed below, select all that influenced the PHA's selection of the strategies it will pursue:

- Funding constraints
- Staffing constraints
- Limited availability of sites for assisted housing
- Extent to which particular housing needs are met by other organizations in the community
- Evidence of housing needs as demonstrated in the Consolidated Plan and other

- information available to the PHA
- Influence of the housing market on PHA programs
- Community priorities regarding housing assistance
- Results of consultation with local or state government
- Results of consultation with residents and the Resident Advisory Board
- Results of consultation with advocacy groups
- Other: (list below)

2. Statement of Financial Resources

[24 CFR Part 903.12 (b), 903.7 (c)]

List on the following table the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan year. Note: the table assumes that Federal public housing or tenant based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2004 grants)		
a) Public Housing Operating Fund	6,872,800 (estimate)	Operations
a) Public Housing Capital Fund	7,480,345 (estimate)	
a) HOPE VI Revitalization	19,500,000	Scattered Sites Redevelopment
a) HOPE VI Demolition	42,000	Scattered Sites Demolition
a) Annual Contributions for Section 8 Tenant-Based Assistance	27,621,148	Section 8 Housing Assistance Payments and Administration
a) Resident Opportunity and Self-Sufficiency Grants	700,000	Employment and Supportive Services
a) Community Development Block Grant	0	
a) HOME	638,000	Housing Development
Other Federal Grants (list below)		
Replacement Housing Funds	1,260,190	Housing Development
HOPE VI Neighborhood Networks	200,000	Cherry Court
2. Prior Year Federal Grants (unobligated funds only) (list below)		
HOPE VI (Highland Park)	2,700,000	Highland redevelopment
ROSS Homeownership Support Services (FY02)	188,435	Homebuyer Counseling
ROSS RSDM	300,000	Supportive Services
HOPE VI Neighborhood Networks (FY02)	250,000	Highland Park
CFP (FY 03)	3,100,000	PH Modernization
Replacement Housing Factor Funds (02/01)	600,000	Public Housing Replacement
Homeland Security	225,000	Public Housing Public Safety
Continuum of Care	572,500	Single Room Occupancy facility
3. Public Housing Dwelling Rental Income (estimate)		
	10,150,000	

4. Other income (list below)		
Section 5(h) Sales	800,000 (estimate)	Homeownership
LIHTC	6,000,000	Cherry Court Redevelopment
Investment	150,000	Operations
Miscellaneous	250,000	Operations
4. Non-federal sources (list below)		
HACM-owned Housing	5,308,160	Operations
Total resources	\$94,908,578	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.12 (b), 903.7 (b)]

A. Public Housing

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

(1) Eligibility

- a. When does the PHA verify eligibility for admission to public housing? (select all that apply)
- When families are within a certain number of being offered a unit: (state number)
 - When families are within a certain time of being offered a unit: (state time)
 - Other: (describe)
 - Within 3-4 months of anticipated occupancy.
- b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?
- Criminal or Drug-related activity
 - Rental history
 - Housekeeping
 - Other (describe)
 - Any family member of the household's application who has been convicted of manufacture or production of methamphetamine in a public housing or Section 8 assisted property;
 - Any family member who has a lifetime registration under a State sex offender registration program;
 - Currently owes rent or other amounts to any housing authority in connection with the public housing or Section 8 programs;
 - Are illegally using a controlled substance or are abusing alcohol in a way that may interfere with the health, safety, or right to peaceful enjoyment of the premises by other

residents (may be waived if person demonstrates no longer engaging in drug-related criminal activity, has successfully completed a supervised drug or alcohol rehabilitation program; has otherwise been rehabilitated successfully; or is participating in a supervised drug or alcohol rehabilitation program);

Have engaged in or threatened abusive or violent behavior towards any HACM staff or resident;

Have committed fraud, bribery or any other corruption in connection with any Federal housing assistance program including the intentional misrepresentation of information related to their housing application or benefits derived there from;

Have failed to provide or supply requested information or failed to respond to written requests to declare their continued interest in the program.

- c. Yes No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- d. Yes No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- e. Yes No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

(2)Waiting List Organization

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

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

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

- PHA main administrative office
- PHA development site management office
- Other (list below)
- Via U.S. mail

- c. Site-Based Waiting Lists-Previous Year

- 1. Has the PHA operated one or more site-based waiting lists in the previous year? If yes, complete the following table; if not skip to d.

Site-Based Waiting Lists

Development Information: (Name, number, location)	Date Initiated	Initial mix of Racial, Ethnic or Disability Demographics	Current mix of Racial, Ethnic or Disability Demographics since Initiation of SBWL	Percent change between initial and current mix of Racial, Ethnic, or Disability demographics

2. What is the number of site based waiting list developments to which families may apply at one time? ___

3. How many unit offers may an applicant turn down before being removed from the site-based waiting list? ___

4. Yes No: Is the PHA the subject of any pending fair housing complaint by HUD or any court order or settlement agreement? If yes, describe the order, agreement or complaint and describe how use of a site-based waiting list will not violate or be inconsistent with the order, agreement or complaint below:

d. Site-Based Waiting Lists – Coming Year

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

1. How many site-based waiting lists will the PHA operate in the coming year? 2

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

3. Yes No: May families be on more than one list simultaneously
 If yes, how many lists? 2

4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?
 PHA main administrative office
 All PHA development management offices
 Management offices at developments with site-based waiting lists
 At the development to which they would like to apply
 Other (list below)

Through Friends of Housing Corporation

(3) Assignment

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

One

Two

Three or More

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

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

(4) Admissions Preferences

a. Income targeting:

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

b. Transfer policies:

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

Emergencies

Over-housed

Under-housed

Medical justification

Administrative reasons determined by the PHA (e.g., to permit modernization work)

Resident choice: (state circumstances below)

Other: (list below)

HACM's transfer policy includes transfer offers being made at a ratio of one transfer for every seven new admissions. In addition, transfers are prioritized within each of the following categories by date and time:

- Emergency transfers: where conditions pose an immediate threat to the life, health or safety of a family member (depending upon the nature/severity of an emergency, an emergency transfer(s) may take priority over a new admission);
- Incentive transfers: for families who live in a development where their income category (below or above 30% of area median) predominates and the family wishes to move to a development where their income category does not predominate;
- Immediate administrative transfers: permit family members needing accessible features to move to a unit with such a feature or to enable

modernization work to proceed;

- o Regular administrative transfers: are made to offer incentives to families willing to help meet certain HACM occupancy goals, to correct occupancy standards where the unit is an inappropriate size and composition of the family; for non-emergency but medically advisable transfers, to allow qualified residents to take advantage of HACM's designated housing plan (i.e. to transfer from a mixed population to an elderly-only high-rise building); and other transfers approved by HACM when a transfer is the only or best way of solving a serious problem.

d. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

- Working families and those unable to work because of age or disability
 - Veterans and veterans' families
 - Residents who live and/or work in the jurisdiction
 - Those enrolled currently in educational, training, or upward mobility programs
 - Households that contribute to meeting income goals (broad range of incomes)
 - Households that contribute to meeting income requirements (targeting)
 - Those previously enrolled in educational, training, or upward mobility programs
 - Victims of reprisals or hate crimes
 - Other preference(s) (list below)
- All preferences are ranked within date and time of application;
Most in need;
Broad range of income
Placement from HACM-owned non-subsidized housing (Veteran Developments)
Designated housing

3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on.

If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

- Date and Time
- Most in need;
- Broad range of income;
- Placement from HACM-owned non-subsidized housing;
- 1 Designated housing

Former Federal preferences:

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

Other preferences (select all that apply)

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

4. Relationship of preferences to income targeting requirements:

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

(5) Occupancy

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

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

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

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

(6) Deconcentration and Income Mixing

- a. Yes No: Does the PHA have any general occupancy (family) public housing developments covered by the deconcentration rule? If no, this section is complete. If yes, continue to the next question.
- b. Yes No: Do any of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments? If no, this section is complete. If yes, list these developments on the following table:

Deconcentration Policy for Covered Developments			
Development Name	Number of Units	Explanation (if any) [see step 4 at §903.2(c)(1)(iv)]	Deconcentration policy (if no explanation) [see step 5 at §903.2(c)(1)(v)]

B. Section 8

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

(1) Eligibility

- a. What is the extent of screening conducted by the PHA? (select all that apply)
 - Criminal or drug-related activity only to the extent required by law or regulation
 - Criminal and drug-related activity, more extensively than required by law or regulation
 - More general screening than criminal and drug-related activity (list factors):
 - Other (list below)
- b. Yes No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- c. Yes No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- d. Yes No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

- e. Indicate what kinds of information you share with prospective landlords? (select all that apply)
- Criminal or drug-related activity
 - Other (describe below)
 - Changes in regulations, policies, procedures and other pertinent information related to the program.

(2) Waiting List Organization

- a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (select all that apply)
- None
 - Federal public housing
 - Federal moderate rehabilitation
 - Federal project-based certificate program
 - Other federal or local program (list below)
- b. Where may interested persons apply for admission to section 8 tenant-based assistance? (select all that apply)
- PHA main administrative office
 - Other (list below)
- The waiting list is currently closed however, when it is open persons may apply through a telemarketing service, via the internet, or at a predetermined location that is announced at the opening of the waiting list. The application process will be publicly announced at least 60 days prior to opening the wait list. HACM may use a lottery system to create a wait list of 2000 applicants.

(3) Search Time

- a. Yes No: Does the PHA give extensions on standard 60-day period to search for a unit?
If yes, state circumstances below:
Initially vouchers are issued for 120 days.

(4) Admissions Preferences

- a. Income targeting

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

- b. Preferences

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

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

Former Federal preferences

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in your jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)
- Catastrophic life/imminent danger
- Families that have been ordered reinstated to the program due to "mitigating circumstances" by the hearing officer and no voucher is currently available.

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

1 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in your jurisdiction

Those enrolled currently in educational, training, or upward mobility programs
Households that contribute to meeting income goals (broad range of incomes)
Households that contribute to meeting income requirements (targeting)
Those previously enrolled in educational, training, or upward mobility programs
Victims of reprisals or hate crimes
Other preference(s) (list below)
Catastrophic life/imminent danger
Families that have been ordered reinstated to the program due to "mitigating circumstances" by the hearing officer and no voucher is currently available.

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

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

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

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

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

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

(5) Special Purpose Section 8 Assistance Programs

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

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

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

Through published notices
Other (list below)
Through partnerships with participating agencies, use of local media, program briefings, participation in landlord associations, newsletters, etc.

4. PHA Rent Determination Policies

[24 CFR Part 903.12(b), 903.7(d)]

A. Public Housing

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

(1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one of the following two)

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

b. Minimum Rent

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

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

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

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

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

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

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

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

For the earned income of a previously unemployed household member

For increases in earned income

Fixed amount (other than general rent-setting policy)

If yes, state amount/s and circumstances below:

Standard exclusion of \$2,000 per household for each public housing household with earned income with the deduction in effect for up to 12 months.

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

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

e. Ceiling rents

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

Yes for all developments
Yes but only for some developments
No

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

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

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

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

f. Rent re-determinations:

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

Never

At family option

Any time the family experiences an income increase

Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold) _____

Other (list below)

Households are required to report any increase in income greater than \$80.00 per month within 10 days of the date of the increase. As long as the family properly reports the increase, the additional income will not be used to determine rent until the next regularly scheduled annual eligibility recertification. Families are also required to report if a member has been added to the family through birth or adoption or court-awarded custody or a household member is leaving or has left the family unit.

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

(2) Flat Rents

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

The section 8 rent reasonableness study of comparable housing

Survey of rents listed in local newspaper

Survey of similar unassisted units in the neighborhood

Other (list/describe below)

Market comparability study

Fair market rents (FMR)

95th percentile rents

B. Section 8 Tenant-Based Assistance

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

(1) Payment Standards

Describe the voucher payment standards and policies.

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

At or above 90% but below 100% of FMR

100% of FMR

Above 100% but at or below 110% of FMR

Above 110% of FMR (if HUD approved; describe circumstances below)

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

all that apply)

FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area

The PHA has chosen to serve additional families by lowering the payment standard

Reflects market or submarket

Other (list below)

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

FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area

Reflects market or submarket

To increase housing options for families

Other (list below)

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

Annually

Other (list below)

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

Success rates of assisted families

Rent burdens of assisted families

Other (list below)

(2) Minimum Rent

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

\$0

\$1-\$25

\$26-\$50

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

HACM has set the minimum rent as \$50.00. However, if the family requests hardship exemption, HACM will suspend the minimum rent for the family beginning the month following the family's hardship request. The suspension will continue until the Housing Authority can determine whether hardship exists and whether the hardship is of a temporary or long-term nature. During suspension, the family will not be required to pay a minimum rent and the Housing Assistance Payment will be increased accordingly.

A hardship exists when the family has lost eligibility for or is awaiting an eligibility determination for a Federal, State or local assistance program including a family that includes a member who is a non-citizen lawfully admitted for permanent residence under the Immigration and Nationality Act who would be entitled to public benefits but for title IV of the Personal

Responsibility and Work Opportunity Act of 1996.

No hardship. If the Housing Authority determines there is no qualifying hardship, the minimum rent will be reinstated, including requiring back payment of minimum rent to the Housing Authority for the time of suspension.

5. Capital Improvement Needs

[24 CFR Part 903.12(b), 903.7 (g)]

Exemptions from Component 5: Section 8 only PHAs are not required to complete this component and may skip to Component 6.

A. Capital Fund Activities

Exemptions from sub-component 5A: PHAs that will not participate in the Capital Fund Program may skip to component 5B. All other PHAs must complete 5A as instructed.

(1) Capital Fund Program

- a. Yes No Does the PHA plan to participate in the Capital Fund Program in the upcoming year? If yes, complete items 12 and 13 of this template (Capital Fund Program tables). If no, skip to B.
- b. Yes No: Does the PHA propose to use any portion of its CFP funds to repay debt incurred to finance capital improvements? If so, the PHA must identify in its annual and 5-year capital plans the development(s) where such improvements will be made and show both how the proceeds of the financing will be used and the amount of the annual payments required to service the debt. (Note that separate HUD approval is required for such financing activities.).

Consistent with 9(g)(1) of the Housing Act of 1937, as amended, 42 USC 1437g(g)(1), HACM reserves its right, with respect to any allocation of Capital Funds, to exercise flexibility to the fullest extent permitted by law.

B. HOPE VI and Public Housing Development and Replacement Activities (Non-Capital Fund)

Applicability of sub-component 5B: All PHAs administering public housing. Identify any approved HOPE VI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

(1) Hope VI Revitalization

- a. Yes No: Has the PHA received a HOPE VI revitalization grant? (if no, skip to next component; if yes, provide responses to questions on chart below for each

grant, copying and completing as many times as necessary)

- b. Status of HOPE VI revitalization grant (complete one set of questions for each grant)

Development name: Lapham Park
Development (project) number: WI002005
Status of grant: (select the statement that best describes the current status)
Revitalization Plan under development
Revitalization Plan submitted, pending approval
Revitalization Plan approved
Activities pursuant to an approved Revitalization Plan underway

Development name: Highland Park
Development (project) number: WI002006A
Status of grant: (select the statement that best describes the current status)
Revitalization Plan under development
Revitalization Plan submitted, pending approval
Revitalization Plan approved
Activities pursuant to an approved Revitalization Plan underway

Development name: Scattered Sites
Development (project) number: WI 2-10, 2-20, 2-21, 2-24, 2-26, 2-27, 2-30 and 2-35
Status of grant: (select the statement that best describes the current status)
Revitalization Plan under development
Revitalization Plan submitted, pending approval
Revitalization Plan approved
Activities pursuant to an approved Revitalization Plan underway

- c. Yes No: Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year? If yes, list development name/s below:
Convent Hill
- d. Yes No: Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year? If yes, list developments or activities below:
Highland Park
Convent Hill
Cherry Court
- e. Yes No: Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement? If yes, list developments or activities below:

Scattered Sites (Replacement Housing Factor funds and HOME funds)

6. Demolition and Disposition

[24 CFR Part 903.12(b), 903.7 (h)]

Applicability of component 6: Section 8 only PHAs are not required to complete this section.

- a. Yes No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 or 24 (Hope VI) of the U.S. Housing Act of 1937 (42 U.S.C. 1437p) or Section 202/Section 33 (Mandatory Conversion) in the plan Fiscal Year? (If "No", skip to component 7; if "yes", complete one activity description for each development on the following chart.)

Demolition/Disposition Activity Description	
1a. Development name:	Scattered Sites
1b. Development (project) number:	WI 2-10, 2-21, 2-24, 2-26 and 2-30
2. Activity type:	Demolition Disposition
3. Application status (select one)	Approved Submitted, pending approval Planned application
4. Date application approved, submitted, or planned for submission:	12/12/2002
5. Number of units affected:	6
6. Coverage of action (select one)	Part of the development Total development
7. Timeline for activity:	a. Actual or projected start date of activity: 12/30/2003 b. Projected end date of activity: 6/30/2004

Demolition/Disposition Activity Description	
1a. Development name:	Scattered Sites
1b. Development (project) number:	WI 2-10, 2-20, 2-21, 2-24, 2-26, 2-27, 2-30 and 2-35
2. Activity type:	Demolition Disposition
3. Application status (select one)	Approved Submitted, pending approval Planned application
4. Date application approved, submitted, or planned for submission:	2/19/2004

5. Number of units affected: 71
6. Coverage of action (select one) Part of the development Total development
7. Timeline for activity: a. Actual or projected start date of activity: 6/01/2004 b. Projected end date of activity: 05/31/2009

Demolition/Disposition Activity Description

1a. Development name: Scattered Sites
1b. Development (project) number: WI002020
2. Activity type: Demolition Disposition
3. Application status (select one) Approved Submitted, pending approval Planned application
4. Date application approved, submitted, or planned for submission: 02/24/2004
5. Number of units affected: 8
6. Coverage of action (select one) Part of the development Total development
7. Timeline for activity: a. Actual or projected start date of activity: 06/01/2004 b. Projected end date of activity: 05/31/2009

Demolition/Disposition Activity Description

1a. Development name: Cherry Court
1b. Development (project) number: WI002009B
2. Activity type: Demolition Disposition
3. Application status (select one) Approved Submitted, pending approval Planned application
4. Date application approved, submitted, or planned for submission:
5. Number of units affected: 120
6. Coverage of action (select one) Part of the development Total development
7. Timeline for activity: a. Actual or projected start date of activity: 2/1/2005 b. Projected end date of activity: 6/1/2005

Demolition/Disposition Activity Description

1a. Development name: Highland Park
1b. Development (project) number: WI002006A

2. Activity type: Demolition Disposition
3. Application status (select one) Approved Submitted, pending approval Planned application
4. Date application approved, submitted, or planned for submission: <u>04/09/2003</u>
5. Number of units affected: 220
6. Coverage of action (select one) Part of the development Total development
7. Timeline for activity: a. Actual or projected start date of activity: <u>3/31/2007</u> b. Projected end date of activity: <u>6/30/2007</u>

Demolition/Disposition Activity Description	
1a. Development name: Westlawn (Silver Spring Neighborhood Center)	
1b. Development (project) number: WI002002	
2. Activity type: Demolition Disposition	
3. Application status (select one) Approved Submitted, pending approval Planned application	
4. Date application approved, submitted, or planned for submission: <u>06/02/2004</u>	
5. Number of units affected: 0 (non-dwelling)	
6. Coverage of action (select one) Part of the development Total development	
7. Timeline for activity: a. Actual or projected start date of activity: <u>06/02/2004</u> b. Projected end date of activity: <u>12/31/2004</u>	

Demolition/Disposition Activity Description	
1a. Development name: Parklawn (Family Investment Center)	
1b. Development (project) number: WI002007	
2. Activity type: Demolition Disposition	
3. Application status (select one) Approved Submitted, pending approval Planned application	
4. Date application approved, submitted, or planned for submission: <u>09/01/2004</u>	
5. Number of units affected: 0 (non-dwelling)	
6. Coverage of action (select one) Part of the development Total development	

7. Timeline for activity:
a. Actual or projected start date of activity: 09/01/2004
b. Projected end date of activity: 06/30/2005

Demolition/Disposition Activity Description

- 1a. Development name: Convent Hill
1b. Development (project) number: WI002003
2. Activity type: Demolition
Disposition
3. Application status (select one)
Approved
Submitted, pending approval
Planned application
4. Date application approved, submitted, or planned for submission: 6/30/2005
5. Number of units affected: 120
6. Coverage of action (select one)
Part of the development
Total development
7. Timeline for activity:
a. Actual or projected start date of activity: 3/31/2008
b. Projected end date of activity: 12/31/2008

Demolition/Disposition Activity Description

- 1a. Development name: Hillside Family Resource Center
1b. Development (project) number: WI002004
2. Activity type: Demolition
Disposition
3. Application status (select one)
Approved
Submitted, pending approval
Planned application
4. Date application approved, submitted, or planned for submission: 6/30/2005
5. Number of units affected: 0
6. Coverage of action (select one)
Part of the development
Total development
7. Timeline for activity:
a. Actual or projected start date of activity: 9/30/2005
b. Projected end date of activity: 12/30/2005

7. Section 8 Tenant Based Assistance--Section 8(y) Homeownership Program
[24 CFR Part 903.12(b), 903.7(k)(1)(i)]

- (1) Yes No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24

CFR part 982 ? (If "No", skip to the next component; if "yes", complete each program description below (copy and complete questions for each program identified.)

(2) Program Description

a. Size of Program

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

If the answer to the question above was yes, what is the maximum number of participants this fiscal year? 200

b. PHA-established eligibility criteria

Yes No: Will the PHA's program have eligibility criteria for participation in its Section 8 Homeownership Option program in addition to HUD criteria? If yes, list criteria below:
Minimum annual income of \$15,000 required.
Maintenance of minimum income required for continued eligibility.
HACM has agreed to partner with a local non-profit to offer homeownership vouchers to families with disabilities.

b. What actions will the PHA undertake to implement the program this year (list)?

Require all participants to attend homeownership counseling classes.
Review all mortgage approvals in an effort to identify predatory lenders.

(3) Capacity of the PHA to Administer a Section 8 Homeownership Program

The PHA has demonstrated its capacity to administer the program by (select all that apply):

a. Establishing a minimum homeowner downpayment requirement of at least 3 percent of purchase price and requiring that at least 1 percent of the purchase price comes from the family's resources.

b. Requiring that financing for purchase of a home under its Section 8 homeownership will be provided, insured or guaranteed by the state or Federal government; comply with secondary mortgage market underwriting requirements; or comply with generally accepted private sector underwriting standards.

c. Partnering with a qualified agency or agencies to administer the program (list name(s) and years of experience below).

d. Demonstrating that it has other relevant experience (list experience below).

HACM has administered a Section 5(h) program and sold more than 130 units since 1994.

8. Civil Rights Certifications

[24 CFR Part 903.12 (b), 903.7 (o)]

Civil rights certifications are included in the *PHA Plan Certifications of Compliance with the*

PHA Plans and Related Regulations: Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans, which is submitted to the Field Office in hard copy—see Table of Contents.

9. Additional Information

[24 CFR Part 903.12 (b), 903.7 (r)]

A. PHA Progress in Meeting the Mission and Goals Described in the 5-Year Plan

(Provide a statement of the PHA's progress against the goals and objectives established in the previous 5-Year Plan for the period FY 2004 - 2008.)

The Housing Authority of the City of Milwaukee (HACM) has developed its FY 2005 Agency Plan in accordance with applicable federal regulations utilizing the electronic template. HACM's five-year plan continues to employ the broad mission and goals outlined by the U.S. Department of Housing and Urban Development along with a series of program specific goals for the upcoming year. In addition to our FY05 goals, HACM is pleased to report the following progress with regard to achieving goals established in our current year plan.

Goal: Sell 20 public housing units under the Section 5(h) Homeownership Program. 12/31/04

Status: Through 8/31/04 HACM sold 27 units under the Section 5(h) program. Additional sales are anticipated which will contribute to HACM significantly exceeding this goal.

Goal: Convert 20 families from rental assistance to homeownership through the Section 8(y) Homeownership Program. 12/31/04.

Status: Through 8/31/04 HACM converted 15 Section 8 Housing Choice Voucher renters to homeownerships. Sixty-eight (68) Section 8(y) homeownership conversions have been completed since HACM began to offer the option. Five additional families have been pre-approved for mortgage financing and are searching for a home. HACM will achieve or exceed this goal.

Goal: Acquire, rehab and sell up to 20 units in conjunction with the Lapham Park HOPE VI program. 12/31/04

Status: Through 9/17/04 HACM had acquired 10 units for rehab under this program and sold three. HACM has begun construction on six new three bedroom homeownership units that will be financed from the Lapham HOPE VI grant and four additional rehab units will be acquired by 12/31/04. The remaining unit sales will be completed by 12/31/05.

Goal: Acquire, rehab and sell up to 10 units in conjunction with redevelopment of the Highland Park neighborhood. 12/31/04

Status: The HOPE VI redevelopment of the Highland Park public housing development is proceeding at or ahead of schedule as of 9/1/04. All of the 40 off-site single-family rental units were substantially complete and construction began on the on-site rental and homeownership units. HACM amended it's HOPE VI plan for the development of homeownership units to reflect "new construction" as the method of development of 24 planned units. Homes will be pre-sold through an on-going marketing effort. This goal will continue into 2006.

Goal: Complete and close out the Lapham Park HOPE VI grant. 12/31/04

Status: The only remaining work funded through the Lapham Park HOPE VI grant is the acquisition /construction of the homeownership units previously discussed. HACM anticipates that this work will be completed and the grant closed by 12/31/04.

Goal: Submit application (s) for funding, including HOPE VI, to revitalize scattered sites public housing. 12/31/04

Status: HACM received a \$19.5 million HOPE VI grant to support the redevelopment of 92 scattered sites public housing units and a \$250,000 grant for the construction of a Neighborhood Network Center in the Cherry Court public housing development.

Goal: Submit a disposition application for the revitalization of the Cherry Court public housing development using tax credits and HOPE VI funds in conjunction with scattered sites. 12/31/04

Status: After cost estimates were received, the Housing Authority decided that demolition and new construction was more feasible.

Goal: Identify potential funding sources and partnership opportunities and apply for funding to support the redevelopment of Convent Hill. 12/31/04

Status: Ongoing – HACM partnered with Friends of Housing Corporation to submit an application for HUD 202 funding for Convent Hill and will submit a HOPE VI application in response to the NOFA for 2004 HOPE VI funds. HACM will also apply for LIHTC funding during the next open application period. The State of Wisconsin included Convent Hill in its application for "Integrating Long Term Supports with Affordable Housing", which was not selected for funding.

Goal: Continue to work with the Dominican Sisters on a program to convert obsolete scattered sites public housing units. 12/31/04

Status: Ongoing – Eight units were converted to homeownership during 2004.

Goal: Enroll and graduate 20 additional families from the "Make Your Money Talk" program administered through a partnership with WWBIC. 12/31/04

Status: Ongoing

Goal: Provide up to 30 educational scholarships for public housing residents through the Endowment Fund. 12/31/04

Status: Ongoing – Sixteen scholarships have been awarded through 9/1/04.

Goal: Continue to work with the Milwaukee Women's Center and Shade Tree Family Resource Center for referral of up to five families each under the "Second Chance Program". 12/31/04

Status: Ongoing – HACM received and placed one client from the Milwaukee Women's Center. Shade Tree Family Resource Center ceased operation during 2004. HACM entered into an MOA with "Pathfinders" for up to five placements. Through 9/1/04, one client has been referred.

Goal: Continue to provide an admissions preference under HACM's Section 8 Housing Choice Voucher Program for clients referred by META House, the Salvation Army, the Milwaukee Community Services Corps, the YWCA and the Milwaukee Jobs Initiative. 12/31/04

Status: Ongoing – Through 9/1/04, 27 referrals had been processed through formal MOA's with the indicated agencies. HACM also entered into an MOA with Milwaukee Public Schools for the referral of up to 50 families through an initiative to address homelessness in MPS.

Goal: Set aside 23 vouchers from HACM's currently authorized allocation under the Section 8 Housing Choice Voucher program for project-based assistance for the Highland Park midrise building to be constructed in 2004. 12/31/04

Status: The final mixed finance agreement for the Highland Park midrise provided for 22 units to be supported with Section 8 project-based voucher assistance. HACM applied for waivers from HUD in August 2004, necessary to obtain final approval for the project-based voucher assistance for this project.

Goal: Open the Section 8 Housing Choice Voucher program wait list and use a lottery system to select 2000 families for placement on the waiting list. 12/31/04

Status: A major change in HUD funding for the Section 8 Housing Choice Voucher program was implemented in July 2004. The resulting reduction in funding for Housing Assistance Payments to landlords required HACM to reduce leasing and control program

turnover. The existing wait list was determined to be adequate to serve the program through 2005.

Goal: Maintain "High Performer" status under the Public Housing Assessment System (PHAS) and the Section 8 Management Assessment Program (SEMAP). 12/31/04

Status: HACM received a PHAS score of 92 and a SEMAP score of 100 to continue "High Performer" status for both programs.

Goal: Continue to participate in the City's Continuum of Care (COC), acquire an SRO facility and consider partnerships for the development of a permanent housing application in the 2004 funding application. 12/31/04

Status: HACM entered into an agreement with the Veterans Administration for access to a building on the VA campus, which will be renovated for use as a 13 unit Single room Occupancy facility. HUD approval of the facility was received in August and construction will begin in the fall of 2004.

HACM also partnered with Community Advocates to submit an application for 2004 COC funding for the construction of a new 22-unit permanent housing facility for chronically homeless individuals. HACM will serve as developer/construction manager for this project.

Goal: Continue to identify potential services and apply for grants to support HACM revitalization activities, public safety, education and employment for HACM residents. 12/31/04

Status: During 2004, HACM applied for funding from the Low Income Housing Tax Credit (LIHTC) program, HOPE VI, Homeland Security, ROSS, Replacement Housing Factor, U.S. Department of Health and Human Services and various local foundations. HACM also obtained a \$3.5 million line of credit to facilitate cash flow and provide gap financing for future redevelopment projects.

Goal: Continue to participate in the "Ellsworth Demonstration Program" and provide an admissions preference in the Section 8 Housing Choice Voucher Program for clients referred through this program. 12/31/04

Status: Ongoing – HACM expanded this initiative during 2004 to include placement of clients referred in "hard to lease" scattered sites public housing units. Three clients were placed through 9/1/04.

Goal: Identify funding and partnerships to assist with mixed-use development at Convent Hill, Hillside Terrace, Lapham Park and the Highland Park neighborhoods. 12/31/04

Status: Ongoing

Goal: Explore other organizational models to facilitate additional development opportunities. 12/31/04

Status: A request for proposals for an organizational assessment was published in August 2004. Firms will be interviewed and a contract awarded during the fourth quarter of 2004.

Goal: Streamline HACM's overall management and improve its operations through the implementation of new software. 12/31/04

Status: HACM purchased a new operating system in April 2004 and implementation began in August 2004.

In addition to the accomplishment of specific program goals, HACM is pleased to report the following:

- During 2004, HACM completed the sale of all 20 of the on-site homeownership units that were constructed as part of the Parklawn HOPE VI redevelopment program.
- Construction proceeded ahead of schedule for the Highland Park HOPE VI redevelopment program. All of the 40 off-site replacement rental housing units will be completed and occupied by 12/31/04 and the new Highland Park midrise will take occupancy in November 2004. Construction of the on-site family public housing rental units began, and these units will be completed in 2005. The first three on-site single-family homeownership units are also under construction and will serve as models for the pre-sale of the 24 on-site homeownership units. All of HACM's construction under this project has utilized universal design principles creating more than 170 new, accessible public housing units. In addition, the new Highland Park midrise will have a "green roof", the largest type of green roof on a residential facility in the Midwest.
- HACM began the first phase of construction of new porches and related site improvements at the Westlawn public housing development. HACM will use capital funds to continue this project in 2005.
- HACM closed the family public housing wait list in September 2004. More than 5000 families had applied and were on the wait list for public housing. With anticipated annual turnover of 350 units, it was not feasible to continue to add additional families to the wait list.
- HACM entered into an agreement with the Veterans Administration for access to and use of a historic building on the campus of the VA Medical Center as a 13-unit Single Room Occupancy (SRO) facility. HACM received a \$572,250 grant in 2002 through the City's Continuum of Care to develop this facility and will contribute \$500,000 from existing resources to finance the renovation of the facility.
- HACM received "bonus funding" under the Capital Fund as a result of achieving "High Performer" status under the Public Housing Assessment System. This

- funding was used for the Westlawn porch replacement project.
- HACM entered into a mixed finance agreement, which will support the future operation of the Highland Park midrise, that includes 46 public housing units, 22 Section 8 project-based voucher assisted units and 46 tax credit only units. The Highland Park LLC engaged Friends of Housing Corporation to manage the new facility.
- HACM received an allocation of Low Income Housing Tax Credits, which will provide \$6 million to support the redevelopment of the Cherry Court public housing development. The "new" Cherry Court facility will include 120 fully accessible rental units, including 70 public housing and 50 project-based Section 8 assisted units.
- HACM applied for 152 tenant-based Section 8 Housing Choice Vouchers as replacement housing for the reduction in public housing units associated with the Highland Park HOPE VI redevelopment program.
- HACM continued to work with, and support, its Resident Advisory Board (RAB). The RAB held its third annual Family Expo in May 2004, which provided workshops and resource information for public housing and Section 8 program participants.

In addition to this specific initiative, the Resident Advisory Board remained actively engaged in its principal task of monitoring HACM performance in achieving the objectives of the annual plan and making policy recommendations to the HACM Board. Through September 2004, the RAB met every month with at least a quorum of resident representatives in attendance. At its August meeting, the RAB hosted a presentation by the American Civil Liberties Union, Legal Action of Wisconsin and the Task Force on Domestic Violence, which recommended changes in HACM Admissions and Continued Occupancy Policy to incorporate a proposed "domestic violence" preference.

- HACM welcomed Ms. Felicia Beamon, a resident of the Highland Homes HOPE VI community, as a member of the HACM Board of Commissioners.
- HACM received a \$19.5 million HOPE VI grant for the revitalization of 92 obsolete scattered sites public housing units. The grant agreement was executed in September 2004 and major construction activities will begin in 2005.

B. Criteria for Substantial Deviations and Significant Amendments

(1) Amendment and Deviation Definitions

24 CFR Part 903.7(r)

PHAs are required to define and adopt their own standards of substantial deviation from the 5-year Plan and Significant Amendment to the Annual Plan. The definition of significant amendment is important because it defines when the PHA will subject a change to the policies or activities described in the Annual Plan to full public hearing and HUD review before implementation.

a. Substantial Deviation from the 5-Year Plan

b. Significant Amendment or Modification to the Annual Plan

HACM will amend or modify its agency plan upon the occurrence of any of the following events during the first nine months of the term of an approved plan:

- A federal statutory or regulatory change is made effective and, in the opinion of the Authority, has either substantial programmatic or financial effects on the programs administered by the Authority, or creates substantial obligations or administrative burdens beyond the programs under administration at the start of the Plan year.
- Any other event that the Authority's Board determines to be a significant amendment or modification of the approved annual plan.

C. Other Information

[24 CFR Part 903.13, 903.15]

(1) Resident Advisory Board Recommendations

a. Yes No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?

If yes, provide the comments below:

The residents asked about the following in Section 3:

- eligibility related to family members that have been convicted of the manufacture or production of methamphetamine;
- does the Housing Authority have any fair housing complaints pending;
- which developments does the Housing Authority currently maintain site-based waiting lists for;
- clarification regarding the admissions preference "placement from HACM-owned non-subsidized housing.

b. In what manner did the PHA address those comments? (select all that apply)

Considered comments, but determined that no changes to the PHA Plan were necessary.

The PHA changed portions of the PHA Plan in response to comments

List changes below:

Modified the language regarding the non-eligibility of family members convicted of the manufacture or production of methamphetamine to reflect that, in this context, it refers to the application process as opposed to a current resident that may be in a similar circumstance;

Answered "no" to the question of whether or not the Housing Authority had any fair housing complaints pending;

Listed the two developments, Highland Park midrise and Cherry Court, that the Housing Authority will maintain site-based waiting lists for tax credit units in the upcoming year; Staff explained to residents that the admissions preference for HACM-owned non-subsidized housing would apply to a resident of one of the three veteran developments that requires subsidized housing due to a change/reduction in income below the market-

rate minimum threshold.

Other: (list below)

(2) Resident Membership on PHA Governing Board

The governing board of each PHA is required to have at least one member who is directly assisted by the PHA, unless the PHA meets certain exemption criteria. Regulations governing the resident board member are found at 24 CFR Part 964, Subpart E.

a. Does the PHA governing board include at least one member who is directly assisted by the PHA this year?

Yes No:

If yes, complete the following:

Name of Resident Member of the PHA Governing Board: Felicia Beamon

Method of Selection:

Appointment

The term of appointment is (include the date term expires): 10/27/2006

Election by Residents (if checked, complete next section--Description of Resident Election Process)

Description of Resident Election Process

Nomination of candidates for place on the ballot: (select all that apply)

Candidates were nominated by resident and assisted family organizations

Candidates could be nominated by any adult recipient of PHA assistance

Self-nomination: Candidates registered with the PHA and requested a place on ballot

Other: (describe)

Eligible candidates: (select one)

Any recipient of PHA assistance

Any head of household receiving PHA assistance

Any adult recipient of PHA assistance

Any adult member of a resident or assisted family organization

Other (list)

Eligible voters: (select all that apply)

All adult recipients of PHA assistance (public housing and section 8 tenant-based assistance)

Representatives of all PHA resident and assisted family organizations

Other (list)

b. If the PHA governing board does not have at least one member who is directly assisted by the PHA, why not?

The PHA is located in a State that requires the members of a governing board to be salaried and serve on a full time basis

The PHA has less than 300 public housing units, has provided reasonable notice to the resident advisory board of the opportunity to serve on the governing board, and has not been notified by any resident of their interest to participate in the Board.

Other (explain):

Date of next term expiration of a governing board member: 6/13/2005

Name and title of appointing official(s) for governing board (indicate appointing official for the next available position):

Tom Barrett, Mayor

(3) PHA Statement of Consistency with the Consolidated Plan

[24 CFR Part 903.15]

For each applicable Consolidated Plan, make the following statement (copy questions as many times as necessary).

Consolidated Plan jurisdiction: (provide name here)

a. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply):

The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.

The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.

The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.

Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)

Redevelopment of the Highland Park neighborhood, including HOPE VI

Hope VI redevelopment of Scattered Sites public housing units

Cherry Court redevelopment

Revitalization of Convent Hill

Other: (list below)

- The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

Infrastructure improvements

Make vacant land available for PHA development

Development of affordable housing using HOME funds

(4) (Reserved)

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

10. Project-Based Voucher Program

- Yes No: Does the PHA plan to "project-base" any tenant-based Section 8 vouchers in the coming year? If yes, answer the following questions.
- Yes No: Are there circumstances indicating that the project basing of the units, rather than tenant-basing of the same amount of assistance is an appropriate option?

If yes, check which circumstances apply:

- Low utilization rate for vouchers due to lack of suitable rental units
- Access to neighborhoods outside of high poverty areas
- Other (describe below:)
- As part of the mixed finance plan to convert existing public housing.

- Indicate the number of units and general location of units (e.g. eligible census tracts or smaller areas within eligible census tracts):
50 units at the Cherry Court LLC

11. List of Supporting Documents Available for Review for Streamlined Five-Year/ Annual PHA Plans

PHAs are to indicate which documents are available for public review by placing a mark in the "Applicable & On Display" column in the appropriate rows. All listed documents must be on display if applicable to the program activities conducted by the PHA.

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
X	<i>PHA Certifications of Compliance with the PHA Plans and Related Regulations and Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans.</i>	Standard 5 Year and Annual Plans; streamlined 5 Year Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan.	5 Year Plans
X	Fair Housing Documentation Supporting Fair Housing Certifications: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	5 Year and Annual Plans
X	Housing Needs Statement of the Consolidated Plan for the jurisdiction(s) in which the PHA is located and any additional backup data to support statement of housing needs for families on the PHA's public housing and Section 8 tenant-based waiting lists.	Annual Plan: Housing Needs

X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O/ACOP), which includes the Tenant Selection and Assignment Plan [TSAP] and the Site-Based Waiting List Procedure.	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Any policy governing occupancy of Police Officers and Over-Income Tenants in Public Housing. Check here if included in the public housing A&O Policy.	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the method for setting public housing flat rents. Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development. Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies (if included in plan, not necessary as a supporting document) and written analysis of Section 8 payment standard policies. Check here if included in Section 8 Administrative Plan.	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation).	Annual Plan: Operations and Maintenance
X	Results of latest Public Housing Assessment System (PHAS) Assessment (or other applicable assessment).	Annual Plan: Management and Operations
X	Follow-up Plan to Results of the PHAS Resident Satisfaction Survey (if necessary)	Annual Plan: Operations and Maintenance and Community Service & Self-Sufficiency
X	Results of latest Section 8 Management Assessment System (SEMAP)	Annual Plan: Management and Operations
X	Any policies governing any Section 8 special housing types check here if included in Section 8 Administrative Plan	Annual Plan: Operations and Maintenance
X	Consortium agreement(s).	Annual Plan: Agency Identification and Operations/ Management
X	Public housing grievance procedures Check here if included in the public housing A & O Policy.	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures. Check here if included in Section 8 Administrative Plan.	Annual Plan: Grievance Procedures
X	The Capital Fund/Comprehensive Grant Program Annual Statement /Performance and Evaluation Report for any active grant year.	Annual Plan: Capital Needs
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grants.	Annual Plan: Capital Needs
X	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans, or any other approved proposal for development of public housing.	Annual Plan: Capital Needs
	Self-evaluation, Needs Assessment and Transition Plan required by regulations implementing Section 504 of the Rehabilitation Act and the Americans with Disabilities Act. See PIH Notice 99-52 (HA).	Annual Plan: Capital Needs
X	Approved or submitted applications for demolition and/or disposition of public housing.	Annual Plan: Demolition and Disposition
X	Approved or submitted applications for designation of public housing (Designated Housing Plans).	Annual Plan: Designation of Public Housing
X	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act, Section 22 of the US Housing Act of 1937, or Section 33 of the US Housing Act of 1937.	Annual Plan: Conversion of Public Housing

X	Documentation for required Initial Assessment and any additional information required by HUD for Voluntary Conversion.	Annual Plan: Voluntary Conversion of Public Housing
X	Approved or submitted public housing homeownership programs/plans.	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program (Section _____ of the Section 8 Administrative Plan)	Annual Plan: Homeownership
X	Public Housing Community Service Policy/Programs Check here if included in Public Housing A & O Policy	Annual Plan: Community Service & Self-Sufficiency
X	Cooperative agreement between the PHA and the TANF agency and between the PHA and local employment and training service agencies.	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan(s) for public housing and/or Section 8.	Annual Plan: Community Service & Self-Sufficiency
X	Section 3 documentation required by 24 CFR Part 135, Subpart E for public housing.	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports for public housing.	Annual Plan: Community Service & Self-Sufficiency
X	Policy on Ownership of Pets in Public Housing Family Developments (as required by regulation at 24 CFR Part 960, Subpart G). Check here if included in the public housing A & O Policy.	Pet Policy
X	The results of the most recent fiscal year audit of the PHA conducted under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings.	Annual Plan: Annual Audit
	Consortium agreement(s), if a consortium administers PHA programs.	Joint PHA Plan for Consortia
	Consortia Joint PHA Plans ONLY: Certification that consortium agreement is in compliance with 24 CFR Part 943 pursuant to an opinion of counsel on file and available for inspection	Joint PHA Plan for Consortia
	Other supporting documents (optional). List individually.	(Specify as needed)

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary					
PHA Name:			Grant Type and Number		Federal FY of Grant:
			Capital Fund Program Grant No:		
			Replacement Housing Factor Grant No:		
Original Annual Statement Reserve for Disasters/ Emergencies Revised Annual Statement (revision no:)					
Performance and Evaluation Report for Period Ending: Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations				
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures				
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant: (sum of lines 2 – 20)				
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

13. Capital Fund Program Five-Year Action Plan

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

PHA Name:			Grant Type and Number Capital Fund Program No: Replacement Housing Factor No:			Federal FY of Grant:	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan					
Part I: Summary					
PHA Name				Original 5-Year Plan Revision No:	
Development Number/Name/HA-Wide	Year 1	Work Statement for Year ² FFY Grant: PHA FY:	Work Statement for Year ³ FFY Grant: PHA FY:	Work Statement for Year ⁴ FFY Grant: PHA FY:	Work Statement for Year ⁵ FFY Grant: PHA FY:
	Annual Statement				
CFP Funds Listed for 5-year planning					
Replacement Housing Factor Funds					

13. Capital Fund Program Five-Year Action Plan

Capital Fund Program Five-Year Action Plan						
Part II: Supporting Pages—Work Activities						
Activities for Year 1	Activities for Year : ____			Activities for Year: ____		
	FFY Grant: PHA FY:			FFY Grant: PHA FY:		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See						
Annual						
Statement						
Total CFP Estimated Cost			\$	\$		

❖ **MILWAUKEE CONTINUUM OF CARE**
2005-2010 STRATEGIC PLAN

