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Health, Housing & Human Services
CLACKAMAS COUNTY

COPY

**Richard Swift**
***Interim Director***

March 19, 2015

Housing Authority Board of Commissioners
Clackamas County

Members of the Board:

Public Hearing on the Proposed 2015-2020 Housing Authority of Clackamas County (HACC) Five-Year Plan

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| **Purpose/Outcomes** | A Public Hearing before the Housing Authority Board of Commissioners to review the past performance of the HACC, and to review the Proposed 2015-2020 HACC 5-Year Plan. |
| **Dollar Amount and Fiscal Impact** | $12,805,483 for Section 8 Voucher funds, $3,573,850 in Public Housing funds and $880,000 in Capital Grants Program funds during FY 2016. |
| **Funding Source** | U.S. Department of Housing and Urban Development - No County General Funds are involved. |
| **Safety Impact** | N/A |
| **Duration** | Effective July 1, 2015 and terminates on June 30, 2020 |
| **Previous Board Action** | 2010-2015 Five-Year Plan approved by the HACC Board on April 8, 2010 – Resolution No. 1874 |
| **Contact Person** | Chuck Robbins, Executive Director - (503) 655-8267 |
| **Contract No.** | |

**BACKGROUND:**
This hearing will satisfy a U.S. Department of Housing and Urban Development (HUD) requirement that the public be given an opportunity annually to review the performance of the Housing Authority of Clackamas County and comment on the goals and objectives of the 5-Year Plan. The Plan includes HACC's 5 year strategic goals, FY2016 HACC Annual Plan, Capital Fund Program (CFP) 5-Year Plan, and FY2016 CFP Annual Plan.

The HACC Annual Plan implements the goals and objectives of the HACC 5-Year plan and updates HUD regarding the Housing Authority's policies, rules, and requirements concerning its operations, programs, and services.

CFP funds are granted by HUD for the development, modernization, and management of Public Housing. Through the submission of the annual and 5-Year CFP Plans, HACC is applying for and seeking Capital Funds in the amount of $880,000 for FY2016.

The Plan meets the following requirements of the Quality Housing and Work Responsibility Act (QHWRA) of 1998.

- The Five-Year Plan was developed in consultation with the Resident Advisory Board (RAB).
- The RAB is made up of residents from Public Housing and Section 8 programs. The RAB met on January 13th, 2015 to review the Plan.
- HACC published a public notice opening the Five-Year Plan for public review and comments from January 23rd, 2015 through March 10th, 2015.
- The Plan was available at the HACC Administrative Office, HACC Property Management Offices, Clackamas County Oak Grove Library, and was posted on HACC's website.

The Public Hearing will consist of three parts:

1) A review of the past performance of the Housing Authority of Clackamas County;
2) A review of the Proposed 2015-2020 HACC 5-Year Plan; and
3) An open discussion period during which citizens may testify on the plan or HACC's programs and actions.

**RECOMMENDATION:**
Staff recommends that the HACC Board take the following actions:

1) Hold a Public Hearing to review past performance of the Housing Authority of Clackamas County and to review the proposed 2015-2020 Five-Year Plan;
2) Direct Housing Authority staff to make any changes necessary as a result of the Board's consideration of testimony to the Proposed Plan, and prepare for Board approval of the Final 2015-2020 Five-Year Plan; and
3) Place approval of the 2015-2020 Five-Year Plan on the HACC Board consent agenda for adoption at a special meeting scheduled for April 2, 2015.

Respectfully submitted,

Richard Swift, Interim Director

Attachments:

- Public Notice of the Public Hearing
- Proposed 2015-2020 5-Year Plan

# Housing Authority of Clackamas County (HACC)

## FY 2016 Annual Plan

Health, Housing & Human Services
CLACKAMAS COUNTY

**HACC Executive Director**
**Chuck Robbins**

Housing Authority of Clackamas County (HACC)

FY2016 Annual Plan

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## PUBLIC HEARING NOTICE

The Housing Authority of Clackamas County Board of Commissioners will hold a Public Hearing at the Public Services Building, located at 2051 Kaen Road, #409, Oregon City, OR 97045 on Thursday March 19th, 2015 at 6pm. The Public Hearing is scheduled to cover the Housing Authority of Clackamas County's (HACC) Draft Fiscal Year 2016 Annual & Five Year Plan.

HACC has developed its Plan in compliance with the Quality Housing and Work Responsibility Act of 1998 and Federal Register, Docket No. FR-4829-N-01.

The Public Meeting and Hearing will also include a review and opportunity to comment on the HACC Public Housing Capital Fund reports and grant expenditure requests.

**Reasonable accommodation will be provided for any individual with a disability**

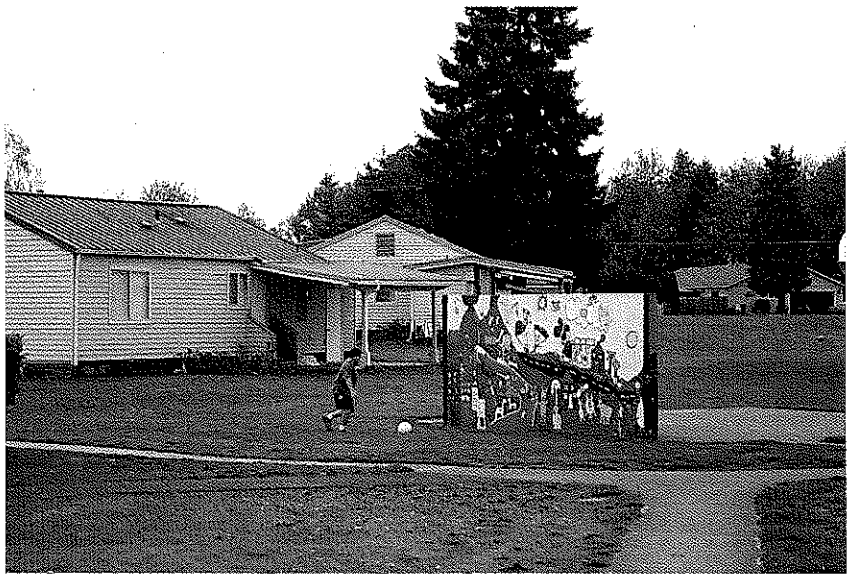
Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in this meeting may request assistance by contacting the 504 Coordinator, Elizabeth Miller. Determinations on requests for reasonable accommodation will be made on a case-by-case basis. All requests must be made at least 5 days before the meeting date.

The Draft Plan is available for review from January 23rd, 2015 through March 10th, 2015. Copies can be obtained online at http://www.clackamas.us/housingauthority/ and hard copies are kept for public review at HACC's administrative office located at 13930 South Gain Street, Oregon City, OR, HACC's Property Management Offices at 13900 South Gain Street, Oregon City, OR HACC's Hillside Manor Office at 2889 S.E. Hillside Court, Milwaukie, OR. HACC's Property Management offices are open Monday through Friday, 8:30 AM to 5 PM and the Administrative Building is open Monday through Thursday, 8 AM to 6 PM. The Plan can also be viewed at the Clackamas County Library, 16201 SE McLoughlin, Oak Grove, OR.

Written comments should be directed to Elizabeth Miller, Housing Authority of Clackamas County, P.O. Box 1510, Oregon City, OR 97045, or by email at emiller@clackamas.us. Comments must be received by March 10th, 2015.

# Housing Authority of Clackamas County

(HACC)



# FY 2016 Annual Plan

Effective Dates upon HUD Approval:

July 1st, 2015-June 30th 2016

| PHA 5-Year and Annual Plan | U.S. Department of Housing and Urban Development<br>Office of Public and Indian Housing | OMB No. 2577-0226<br>Expires 4/30/2011 |
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**1.0 PHA Information**

PHA Name: Housing Authority of Clackamas County PHA Code: OR001

PHA Type: ☐ Small ☒ High Performing ☐ Standard ☐ HCV (Section 8)

PHA Fiscal Year Beginning: (MM/YYYY): 07/2015

**2.0 Inventory** (based on ACC units at time of FY beginning in 1.0 above)

Number of PH units: 545 Number of HCV units: 1630

**3.0 Submission Type**

☒ 5-Year and Annual Plan ☐ Annual Plan Only ☐ 5-Year Plan Only

**4.0 PHA Consortia** ☐ PHA Consortia: (Check box if submitting a joint Plan and complete table below.)

| Participating PHAs | PHA Code | Program(s) Included in the Consortia | Programs Not in the Consortia | No. of Units in Each Program | |
|---|---|---|---|---|---|
| | | | | PH | HCV |
| PHA 1: | | | | | |
| PHA 2: | | | | | |
| PHA 3: | | | | | |

**5.0 5-Year Plan.** Complete items 5.1 and 5.2 only at 5-Year Plan update.

**5.1 Mission.** State the PHA's Mission for serving the needs of low-income, very low-income, and extremely low income families in the PHA's jurisdiction for the next five years:

The Housing Authority of Clackamas County's (HACC's) mission is to provide affordable, safe, decent and sanitary housing opportunities in a fiscally responsible manner to low-income people in Clackamas County.

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| 5.2 | **Goals and Objectives.** Identify the PHA's quantifiable goals and objectives that will enable the PHA to serve the needs of low-income and very low-income, and extremely low-income families for the next five years. Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5-Year Plan.<br><br>**HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.**<br><br>☒ PHA Goal: Expand the supply of assisted housing. Objectives:<br>☒ Apply for additional rental vouchers, as appropriate.<br>☒ Reduce public housing vacancies.<br>☒ Leverage private or other public funds to create additional housing opportunities.<br>☒ Acquire or build units or developments.<br><br>☒ PHA Goal: Improve the quality of assisted housing. Objectives:<br>☒ Maintain High Performer Status in public housing management.<br>☒ Maintain High Performer Status in voucher management.<br>☒ Improve welcoming environment.<br>☒ Concentrate on efforts to improve specific management functions: geographic inspections, self certification of repairs, photos of inspections, paperless scanning and attaching of documents.<br>☒ Renovate or modernize public housing units, as needed.<br>☒ Demolish or dispose of obsolete public housing, as appropriate.<br>☒ Provide replacement public housing, as available.<br>☒ Provide replacement vouchers, as available.<br><br>☒ PHA Goal: Increase assisted housing choices. Objectives:<br>☒ Provide voucher mobility counseling.<br>☒ Conduct outreach efforts to potential voucher landlords, **working with Fair Housing Council.**<br>☒ Increase voucher payment standards, as needed.<br>☒ Convert public housing to vouchers through development projects, as appropriate and available.<br><br>**HUD Strategic Goal: Improve community quality of life and economic vitality**<br><br>☒ PHA Goal: Provide an improved living environment. Objectives:<br>☒ Implement measures to de-concentrate poverty by bringing higher income public housing households into lower income developments: when reviews of projects and census tracts show that a concentration of poverty exists.<br>☒ Continue to encourage income mixing in public housing by assuring access for lower income families into higher income developments.<br>☒ Develop stronger working relationships with service providers who assist our residents who are elderly and/or disabled.<br>☒ Continue to review and Implement public housing security improvements.<br>☒ Designate developments or buildings for particular resident groups (elderly, persons with disabilities) as needed.<br>☒ Other: (list below) Provide or attract social services for youth to succeed in school.<br><br>**HUD Strategic Goal: Promote self-sufficiency and asset development of families and individuals**<br><br>☒ PHA Goal: Promote self-sufficiency and asset development of assisted households. Objectives:<br>☒ Increase the number and percentage of employed persons in assisted families.<br>☒ Provide or attract supportive services to improve assistance recipients' employability.<br>☒ Provide or attract supportive services to increase independence for the elderly or families with disabilities.<br>☒ Develop a strategy and protocol for cross training of staff members to ensure both public housing and Section 8 staff availability to provide the highest level of service to the clients we serve and the general public.<br><br>**HUD Strategic Goal: Ensure Equal Opportunity in Housing for all Americans**<br><br>☒ PHA Goal: Ensure equal opportunity and affirmatively further fair housing. Objectives:<br>☒ Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability.<br>☒ 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.<br>☒ Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required. |

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| 6.0 | **PHA Plan Update**<br><br>(a) Identify all PHA Plan elements that have been revised by the PHA since its last Annual Plan submission:<br><br>**Agency-Wide Updates**<br>1) The Housing Advisory Board is evaluating the development of additional affordable housing in Clackamas County.<br>2) HACC may submit a Move to Work (MTW) application in FY2015.<br>3) HACC may submit a Request for Proposal to encourage additional affordable housing that could include Shelter + Care, VASH Vouchers, or Project-Based Vouchers.<br><br>**Housing Choice Voucher Updates**<br>1) HACC received renewed funding for 1.5 FTE FSS staffing.<br>2) HACC was awarded 15 additional VASH vouchers.<br>3) HACC may open the Housing Choice Voucher waiting list.<br>4) HACC plans to update the lease agreement.<br>5) See Attachment A for policy changes to its Administrative Plan.<br><br>**Public Housing/Asset Management Updates**<br>1) HACC may open several Public Housing waiting lists.<br>2) HACC plans to update the lease agreement.<br>3) See Attachment B for policy changes to its Admissions and Continued Occupancy Policy (ACOP).<br><br>(b) Identify the specific location(s) where the public may obtain copies of the 5-Year and Annual PHA Plan. For a complete list of PHA Plan elements, see Section 6.0 of the instructions.<br>1) Housing Authority Administrative Office, 13930 S Gain Street, Oregon City, OR<br>2) Housing Authority Clackamas Heights Property Management Office, 13900 S Gain Street, Oregon City, OR<br>3) Housing Authority Hillside Property Management Office, 2889 Hillside Court, Milwaukie, OR<br>4) Housing Authority Website: http: //www.clackamas.us/hacc under Plans and Reports<br>5) Clackamas County Public Library located at 16201 S.E. McLoughlin, Oak Grove, OR |
| 7.0 | **Hope VI, Mixed Finance Modernization or Development, Demolition and/or Disposition, Conversion of Public Housing, Homeownership Programs, and Project-based Vouchers.** *Include statements related to these programs as applicable.*<br><br>**Development Updates**<br>• HACC completed renovation of the Easton Ridge Apartments in July 2014. The project converted to permanent financing in December 2014. The complex will operate as a Low Income Housing Tax Credit (LIHTC) property for the next 15 years.<br>• HCD (Housing Authority of Clackamas County & Community Development) issued a RFP for housing development in FY2014. HCD awarded 21 Project Based Vouchers, $1,300,000 in disposition funds and $1,500,000 in Community Development Home Funds on December 18, 2014, to Town Center Greens (owned by Central City Concern) for the development of 60 Supportive Housing units.<br>• HACC anticipates continuing its efforts to identify **Mixed Finance Modernization or Development** opportunities which could include the Rental Assistance Demonstration (RAD) program, and a combination of public housing and Project Based Section 8/Low Income Housing Tax Credit (LIHTC) units.<br>• HACC will increase rent at Easton Ridge by $50/month.<br>• HACC will evaluate and may proceed with a Physical Needs Assessment (PNA) of its Public Housing units.<br>• HACC will explore opportunities of expending remaining disposition funds for the development of additional affordable housing.<br>• HACC will submit an inventory removal application to HUD's Special Applications Center (SAC) in FY2015 for approval to sell a small corner of land at Oregon City View Manor for neighboring development. |
| 8.0 | **Capital Improvements.** Please complete Parts 8.1 through 8.3, as applicable.<br><br>N/A per 24 CFR Parts 903, 905, 941, *et al.* |
| 8.1 | **Capital Fund Program Annual Statement/Performance and Evaluation Report.** As part of the PHA 5-Year and Annual Plan, annually complete and submit the *Capital Fund Program Annual Statement/Performance and Evaluation Report,* form HUD-50075.1, for each current and open CFP grant and CFFP financing.<br><br>See **Attachment E**: 12 pages |
| 8.2 | **Capital Fund Program Five-Year Action Plan.** As part of the submission of the Annual Plan, PHAs must complete and submit the *Capital Fund Program Five-Year Action Plan,* form HUD-50075.2, and subsequent annual updates (on a rolling basis, e.g., drop current year, and add latest year for a five year period). Large capital items must be included in the Five-Year Action Plan.<br><br>See **Attachment F**: 5 pages |
| 8.3 | **Capital Fund Financing Program (CFFP).**<br>☐ Check if the PHA proposes to use any portion of its Capital Fund Program (CFP)/Replacement Housing Factor (RHF) to repay debt incurred to finance capital improvements.<br><br>**N/A** |

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| 9.0 | **Housing Needs**. Based on information provided by the applicable Consolidated Plan, information provided by HUD, and other generally available data, make a reasonable effort to identify the housing needs of the low-income, very low-income, and extremely low-income families who reside in the jurisdiction served by the PHA, including elderly families, families with disabilities, and households of various races and ethnic groups, and other families who are on the public housing and Section 8 tenant-based assistance waiting lists. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location.<br><br>See **Attachment C**: Housing Needs Table and Priority Housing Needs Table |

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| 9.1 | **Strategy for Addressing Housing Needs**. Provide a brief description of the PHA's strategy for addressing the housing needs of families in the jurisdiction and on the waiting list in the upcoming year. **Note: Small, Section 8 only, and High Performing PHAs complete only for Annual Plan submission with the 5-Year Plan.**<br><br>See **Attachment D**: Strategy for Addressing Housing Needs |
| 10.0 | **Additional Information**. Describe the following, as well as any additional information HUD has requested.<br><br>(a) Progress in Meeting Mission and Goals. Provide a brief statement of the PHA's progress in meeting the mission and goals described in the 5-Year Plan.<br><br>• HACC will participate in the Clackamas County Homeless Council. In this capacity, HACC will apply and receive Continuum of Care funds for the Shelter plus Care program and the Jannsen Transitional Housing Program.<br>• HACC will continue to work on homelessness in Clackamas County by participation in the Coordinated Housing Access program.<br>• HACC achieved High Performer rating on its Section Eight Management Assessment Program (SEMAP).<br>• HACC achieved High Performer rating in Public Housing.<br>• HACC will use Easton Ridge property to further provide affordable housing. Easton Ridge currently accepts Section 8 Vouchers, Shelter + Care and VASH participants.<br>• HACC will apply for and receive grant funding for 1.5 FTE for housing choice voucher family self-sufficiency coordinators.<br>• HACC utilized 90-93% of its HCV Housing Assistance grant due to sequestration funding cuts. HACC plans to get to 95-100% lease-up.<br>• HACC will maintain high occupancy rates in Public Housing at 98% or more in an effort to serve those on the waitlist as quickly as possible.<br>• HACC establish a landlord newsletter and Semi-Annual Landlord Trainings.<br>• HACC established higher payment standards for Lake Oswego and West Linn areas.<br>• VASH Vouchers are at 100% lease up.<br>• HACC is actively engaged in a multi-regional multi-state Workforce Grant to support PHA residents gain the life and employment skills necessary to attain self-sufficiency. HACC enrolled 67 participants and was only required to enroll 50.<br>• HACC is actively engaged in a Mobility grant project involving four regional Housing Authorities and PSU to develop a toolkit for residents to use when they move. The toolkit is aimed at transportation education when deciding on a location to move to.<br>• HCD (Housing Authority of Clackamas County & Community Development) issued a RFP for housing development in FY2014. HCD awarded 21 Project Based Vouchers, $1,300,000 in disposition funds and $1,500,000 in Community Development Home Funds on December 18, 2014, to Town Center Greens (owned by Central City Concern) for the development of 60 Supportive Housing units.<br><br>(b) Significant Amendment and Substantial Deviation/Modification. Provide the PHA's definition of "significant amendment" and "substantial deviation/modification"<br><br>Discretionary changes (changes which are not mandated by regulation) in the plans or policies of the HACC which fundamentally change the mission, goals, objectives, or plans of the agency and which require formal approval of the Board of Housing Authority Commissioners. Discretionary changes include Capital Fund items that have a total expense in excess of $250,000 in any single grant year. |

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| 11.0 | **Required Submission for HUD Field Office Review**. In addition to the PHA Plan template (HUD-50075), PHAs must submit the following documents. Items (a) through (g) may be submitted with signature by mail or electronically with scanned signatures, but electronic submission is encouraged. Items (h) through (i) must be attached electronically with the PHA Plan. **Note:** Faxed copies of these documents will not be accepted by the Field Office.<br><br>(a) Form HUD-50077, *PHA Certifications of Compliance with the PHA Plans and Related Regulations* (which includes all certifications relating to Civil Rights)<br>(b) Form HUD-50070, *Certification for a Drug-Free Workplace* (PHAs receiving CFP grants only)<br>(c) Form HUD-50071, *Certification of Payments to Influence Federal Transactions* (PHAs receiving CFP grants only)<br>(d) Form SF-LLL, *Disclosure of Lobbying Activities* (PHAs receiving CFP grants only)<br>(e) Form SF-LLL-A, *Disclosure of Lobbying Activities Continuation Sheet* (PHAs receiving CFP grants only)<br>(f) Resident Advisory Board (RAB) comments. Comments received from the RAB must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the recommendations and the decisions made on these recommendations.<br>(g) Challenged Elements<br>(h) Form HUD-50075.1, *Capital Fund Program Annual Statement/Performance and Evaluation Report* (PHAs receiving CFP grants only)<br>(i) Form HUD-50075.2, *Capital Fund Program Five-Year Action Plan* (PHAs receiving CFP grants only) |

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

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

# Instructions form HUD-50075

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

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

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

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

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

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

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

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

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

(a) Identify specifically which plan elements have been revised since the PHA's prior plan submission.

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

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

1. **Eligibility, Selection and Admissions Policies, including Deconcentration and Wait List Procedures.** Describe the PHA's policies that govern resident or tenant eligibility, selection and admission including admission preferences for both public housing and HCV and unit assignment policies for public housing; and procedures for maintaining waiting lists for admission to public housing and address any site-based waiting lists.

2. **Financial Resources.** A statement of financial resources, including a listing by general categories, of the PHA's anticipated resources, such as PHA Operating, Capital and other anticipated Federal resources available to the PHA, as well as tenant rents and other income available to support public housing or tenant-based assistance. The statement also should include the non-Federal sources of funds supporting each Federal program, and state the planned use for the resources.

3. **Rent Determination.** A statement of the policies of the PHA governing rents charged for public housing and HCV dwelling units.

4. **Operation and Management.** A statement of the rules, standards, and policies of the PHA governing maintenance management of housing owned, assisted, or operated by the public housing agency (which shall include measures necessary for the prevention or eradication of pest infestation, including cockroaches), and management of the PHA and programs of the PHA.

5. **Grievance Procedures.** A description of the grievance and informal hearing and review procedures that the PHA makes available to its residents and applicants.

6. **Designated Housing for Elderly and Disabled Families.** With respect to public housing projects owned, assisted, or operated by the PHA, describe any projects (or portions thereof), in the upcoming fiscal year, that the PHA has designated or will apply for designation for occupancy by elderly and disabled families. The description shall include the following information: **1)** development name and number; **2)** designation type; **3)** application status; **4)** date the designation was approved, submitted, or planned for submission, and; **5)** the number of units affected.

7. **Community Service and Self-Sufficiency.** A description of: **(1)** Any programs relating to services and amenities provided or offered to assisted families; **(2)** Any policies or programs of the PHA for the enhancement of the economic and social self-sufficiency of assisted families, including programs under Section 3 and FSS; **(3)** How the PHA will comply with the requirements of community service and treatment of income changes resulting from welfare program requirements. **(Note: applies to only public housing).**

8. **Safety and Crime Prevention.** For public housing only, describe the PHA's plan for safety and crime prevention to ensure the safety of the public housing residents. The statement must include: (i) A description of the need for measures to ensure the safety of public housing residents; (ii) A description of any crime prevention activities conducted or to be conducted by the PHA; and (iii) A description of the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities.

9. **Pets.** A statement describing the PHAs policies and requirements pertaining to the ownership of pets in public housing.

10. **Civil Rights Certification.** A PHA will be considered in compliance with the Civil Rights and AFFH Certification if: it can document that it examines its programs and proposed programs to identify any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with the local jurisdiction to implement any of the jurisdiction's initiatives to affirmatively further fair housing; and assures that the annual plan is consistent with any applicable Consolidated Plan for its jurisdiction.

11. **Fiscal Year Audit.** The results of the most recent fiscal year audit for the PHA.

12. **Asset Management.** A statement of how the agency will carry out its asset management functions with respect to the public housing inventory of the agency, including how the agency will plan for the long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs for such inventory.

13. **Violence Against Women Act (VAWA).** A description of: **1)** Any activities, services, or programs provided or offered by an agency, either directly or in partnership with other service providers, to child or adult victims of domestic violence, dating violence, sexual assault, or stalking; **2)** Any activities, services, or programs provided or offered by a PHA that helps child and adult victims of domestic violence, dating violence, sexual assault, or stalking, to obtain or maintain housing; and **3)** Any activities, services, or programs provided or offered by a public housing agency to prevent domestic violence, dating violence, sexual assault, and stalking, or to enhance victim safety in assisted families.

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

(a) **Hope VI or Mixed Finance Modernization or Development.** **1)** A description of any housing (including project number (if known) and unit count) for which the PHA will apply for HOPE VI or Mixed Finance Modernization or Development; and **2)** A timetable for the submission of applications or proposals. The application and approval process for Hope VI, Mixed Finance Modernization or Development, is a separate process. See guidance on HUD's website at: http://www.hud.gov/offices/pih/programs/ph/hope6/index.cfm

(b) **Demolition and/or Disposition.** With respect to public housing projects owned by the PHA and subject to ACCs under the Act: **(1)** A description of any housing (including project number and unit numbers [or addresses]), and the number of affected units along with their sizes and accessibility features) for which the PHA will apply or is currently pending for demolition or disposition; and **(2)** A timetable for the demolition or disposition. The application and approval process for demolition and/or disposition is a separate process. See guidance on HUD's website at: http://www.hud.gov/offices/pih/centers/sac/demo_dispo/index.cfm
**Note:** This statement must be submitted to the extent **that approved and/or pending** demolition and/or disposition has changed.

(c) **Conversion of Public Housing.** With respect to public housing owned by a PHA: **1)** A description of any building or buildings (including project number and unit count) that the PHA is required to convert to tenant-based assistance or that the public housing agency plans to voluntarily convert; **2)** An analysis of the projects or buildings required to be converted; and **3)** A statement of the amount of assistance received under this chapter to be used for rental assistance or other housing assistance in connection with such conversion. See guidance on HUD's website at: http://www.hud.gov/offices/pih/centers/sac/conversion.cfm

(d) **Homeownership.** A description of any homeownership (including project number and unit count) administered by the agency or for which the PHA has applied or will apply for approval.

(e) **Project-based Vouchers.** If the PHA wishes to use the project-based voucher program, a statement of the projected number of project-based units and general locations and how project basing would be consistent with its PHA Plan.

**8.0 Capital Improvements.** This section provides information on a PHA's Capital Fund Program. With respect to public housing projects owned, assisted, or operated by the public housing agency, a plan describing the capital improvements necessary to ensure long-term physical and social viability of the projects must be completed along with the required forms. Items identified in 8.1 through 8.3, must be signed where directed and transmitted electronically along with the PHA's Annual Plan submission.

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

(a) To submit the initial budget for a new grant or CFFP;

(b) To report on the Performance and Evaluation Report progress on any open grants previously funded or CFFP; and

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

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

1. At the end of the program year; until the program is completed or all funds are expended;

2. When revisions to the Annual Statement are made, which do not require prior HUD approval, (e.g., expenditures for emergency work, revisions resulting from the PHAs application of fungibility); and

3. Upon completion or termination of the activities funded in a specific capital fund program year.

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

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

**8.3 Capital Fund Financing Program (CFFP).** Separate, written HUD approval is required if the PHA proposes to pledge any

portion of its CFP/RHF funds to repay debt incurred to finance capital improvements. The PHA must identify in its Annual and 5-year capital plans the amount of the annual payments required to service the debt. The PHA must also submit an annual statement detailing the use of the CFFP proceeds. See guidance on HUD's website at: http://www.hud.gov/offices/pih/programs/ph/capfund/cffp.cfm

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

9.1 **Strategy for Addressing Housing Needs.** Provide a description of the PHA's strategy for addressing the housing needs of families in the jurisdiction and on the waiting list in the upcoming year. (**Note:** Standard and Troubled PHAs complete annually; Small and High Performers complete only for Annual Plan submitted with the 5-Year Plan).

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

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

(b) **Significant Amendment and Substantial Deviation/Modification.** PHA must provide the definition of "significant amendment" and "substantial deviation/modification". **(Note: Standard and Troubled PHAs complete annually; Small and High Performers complete only for Annual Plan submitted with the 5-Year Plan.)**

(c) PHAs must include or reference any applicable memorandum of agreement with HUD or any plan to improve performance. **(Note: Standard and Troubled PHAs complete annually).**

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

(a) Form HUD-50077, *PHA Certifications of Compliance with the PHA Plans and Related Regulations*

(b) Form HUD-50070, *Certification for a Drug-Free Workplace* **(PHAs receiving CFP grants only)**

(c) Form HUD-50071, *Certification of Payments to Influence Federal Transactions* **(PHAs receiving CFP grants only)**

(d) Form SF-LLL, *Disclosure of Lobbying Activities* **(PHAs receiving CFP grants only)**

(e) Form SF-LLL-A, *Disclosure of Lobbying Activities Continuation Sheet* **(PHAs receiving CFP grants only)**

(f) Resident Advisory Board (RAB) comments.

(g) Challenged Elements. Include any element(s) of the PHA Plan that is challenged.

(h) Form HUD-50075.1, ***Capital Fund Program Annual Statement/Performance and Evaluation Report*** **(Must be attached electronically for PHAs receiving CFP grants only).** See instructions in 8.1.

(i) Form HUD-50075.2, *Capital Fund Program Five-Year Action Plan* **(Must be attached electronically for PHAs receiving CFP grants only).** See instructions in 8.2.

## ATTACHMENT A

## Summary of Housing Choice Voucher Administrative Plan Policy Changes: FY2016

| | New Policy Summary | New Policy Language | Chapter |
|---|---|---|---|
| 1 | **TEMPORARY ADDENDUM DOCUMENT**<br><br>Renewal of Policy from 2013 | *On January 22, 2013, HUD issued Notice PIH 2013-03, allowing the PHA to adopted:*<br>*1. Allow households to self-certify assets of $5,000 or less.*<br>*2. Allow optional streamlined annual reexaminations for elderly families and disabled families on fixed incomes.*<br>*3. Allow PHAs to establish a payment standard of not more than 120 percent of the fair market rent (FMR) without HUD approval as a reasonable accommodation.* | **Addendum** |
| 2 | Families will be denied admission into the HCV Program if they are found owing another PHA money or having been terminated by another PHA for program violations. | *Any family member appears in HUD's Enterprise Income Verification (EIV) database system with debts owed to another PHA or has been terminated for program violations. Client's in EIV are placed in the database for 10 years or until debts are paid. Proof of payment from the PHA is needed for all debts owed to overturn a denial.*<br>*Any family member appears in HAPPY owing any PHA money.* | **Chapter 3** |
| 3 | Families who lived in Clackamas County at time of application get served before other families who applied while living outside of the Clackamas County | *The waiting list will be ordered by date and time of receipt of application, separated into three sections. The first section will be those families eligible for a preference as described below as 1-12 and will be maintained by time and date received. The second section will be those families whose initial application address is within Clackamas County. Families within this second section will carry the same weight except that preference will be given to elderly, disabled, or displaced single person families over other single person families. The third Section will be for all other families.* | **Chapter 4** |
| 4 | Orientations will be available On-Line | *Briefings also referred to as Orientations will be conducted in group meetings or may be done through an on-line training.* | **Chapter 5** |
| 5 | Briefing Materials available On-Line as well as in class. | *To eliminate waste and copying costs, all the required briefing packet items will be made available and discussed during group briefings and on-line. It is the client's choice which items they will choose to take home or get on-line. However a packet containing the following basic materials will be given directly to each client to take home: Voucher, Request for Tenancy Approval, Tenant Rent and Subsidy Worksheet, Utility Allowance Chart, Determination of Housing Assistance Payments, and Payment Standard chart.* | **Chapter 5** |
| 6 | Voucher search time increased from 60-90 days with one 30 day | *The initial voucher term will be 90 calendar days for all programs except VASH initial voucher term will be 120 calendar days.* | **Chapter 5** |

| | | | |
|---|---|---|---|
| | exte[illegible]n allowed for good cause. | *Extensions will be limited to no more than one 30 day extension as outlined under Extension of Voucher Term below.*<br>*HACC will not grant extensions on ports to other jurisdictions.* | |
| 6 | Utility Allowance Federally required change in policy | *The Utility Allowance for a family shall be the lower of: (1) the utility allowance amount for the family unit size; or (2) the utility allowance amount for the unit size of the unit rented by the family.* | **Chapter 6** |
| 7 | Inspections can be biennially instead of annually, done based on geographic location and not by annual recertification date, and photos may be taken at each inspection. | *HACC may conduct regular unit inspections every other year for all tenant-based HCV participants unless:*<br>o *The family had two consecutive failed inspections in the last two years;*<br>o *There is a concerning factor regarding inspections or unit status; or*<br>o *Family lives in a unit owned or managed by a landlord or property management company with a concerning inspection history.*<br>*As families are admitted onto the program, they may be placed on a biennially inspection schedule. Participated placed on a biennially schedule will remain on that schedule unless a concern arises, or HUD rules change, at which point they will be placed back on an annual schedule until the concern no longer exists.*<br>*HACC may at any time take photo's of units while doing inspections and is strongly encouraged to do so by HUD.*<br>*HACC is converting from Annual/Biennially inspections tied to Annual Recertification date to inspections based on geographic location. During the initial process, this may mean a client will get more than one inspection in a 12 month period.* | **Chapter 8** |
| 9 | Lease lengths may vary | *HACC prefers an initial lease term of at least one (1) year; however, it may approve a shorter initial lease term if the PHA determines that:*<br>• *Such shorter term would improve housing opportunities for tenants;*<br>• *Such shorter term is the prevailing local market practice; and*<br>*A lease term of less than six (6) months must be approved in writing by the Housing Services Manager* | **Chapter 9** |
| 8 | Marijuana is defined as a Controlled Substance | *HACC shall apply the standard of illegally using a controlled substance as defined in the Controlled Substance Act 21 U.S.C. Section 81 et. Seq.* | **Chapter 3 and 12 Denials and Terminations** |

## ATTACHMENT B

## Summary of Public Housing Policy Changes: FY2016

| | Summary | Revised Language or Policy | Document |
|---|---|---|---|
| 1 | Update Contact Information | Executive Director listed: Trell Anderson<br>Current Executive Director: Chuck Robbins, Executive Director | Lease: Section I-B |
| 2 | Late fee increase | Current late fee charge = $25<br>Proposed late fee charge = $50 | Lease: Section III-B.1 |
| 3 | Maintenance fee increase | Current Fee = $23 per hour<br>Proposed fee = $40 per hour | Lease: Section III-E.1 |
| 4 | Use of Marijuana | Insert: Smoking marijuana is strictly prohibited anywhere on property owned by HACC. | Lease: Section VI-Q.1 |
| 5 | Review of lease | During the next program year staff will conduct a comprehensive review of the Public Housing Lease to determine other changes needed to ensure that the lease meets all current landlord/tenant regulations. | Lease: Entire document |
| 6 | TEMPORARY ADDENDUM DOCUMENT<br><br>Renewal of Policy from 2013 | On January 22, 2013, HUD issued Notice PIH 2013-03, allowing the PHA to adopted:<br>1. Allow households to self-certify assets of $5,000 or less.<br>2. Allow optional streamlined annual reexaminations for elderly families and disabled families on fixed incomes. | ACOP: Chapter 16 |
| 7 | Prohibition of growing marijuana on public housing property | Oregon Measure 91 which was passed will is expected promulgated on July 1st, 2015. This new law will allow for the growing, possession and use of recreational marijuana. Because public housing is a federal program and public housing authority real property is regulated under the federal law, HACC will prohibit growing, possessing or using marijuana under the, "Controlled Substance Act (CSA), 21 U.S.C. Section 801 et. Seq.". This act categorizes marijuana as a Schedule 1 substance and therefore the manufacture, distribution, or possession of marijuana is a federal criminal offense. HACC shall apply the standard of illegally using a controlled substance as defined in the Controlled Substance Act 21 U.S.C. Section 81 et. Seq. | ACOP: Section 3-III.B. |

## Attachment C
## Housing Needs Table

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

| **Housing Needs of Families on the Waiting List: Housing Choice Voucher and Public Housing** | | |
|---|---|---|
| | # of Families | % of Total Families |
| Waiting List Total | 4,109 | 100% |
| Section 8 Waiting List | 1,387 | 34% |
| Public Housing Waiting List | 2,722 | 66% |
| Extremely Low Income <= 30% of AMI | 3,528 | 86% |
| Very Low Income <= 50% of AMI | 460 | 11% |
| Low Income <= 80% of AMI | 96 | 2% |
| Above 80% of AMI | 25 | 1% |
| Elderly | 305 | 7% |
| Non-Elderly | 3,804 | 93% |
| Disabled Head of Household | 1,144 | 28% |
| White | 2,989 | 73% |
| Black/African American | 285 | 19% |
| American Indian/Alaska Native | 156 | 4% |
| Asian | 104 | 3% |
| Native Hawaiian/Pacific Island | 46 | 1% |
| Hispanic | 339 | 8% |
| Non-Hispanic | 3,770 | 92% |
| **Characteristics by Bedroom Size (Public Housing Only)** | | |
| 0 BR | 0 | 0% |
| 1 BR | 754 | 28% |
| 2 BR | 559 | 21% |
| 3 BR | 862 | 32% |
| 4 BR | 547 | 20% |

** The Clackamas County average family size of 3 was used to for baseline AMI data.*
*** Elderly is defined as 65 years and over.*
**** Disability Status Reflects American Community Survey 2009 Data*

## Attachment C
## Priority Housing Needs Table

| PRIORITY HOUSING NEEDS (households) | | Priority | | Unmet Need |
|---|---|---|---|---|
| Renter | Small Related | 0-30% | H | 1,595 |
| | | 31-50% | H | 1,779 |
| | | 51-80% | H | 1,421 |
| | Large Related | 0-30% | H | 360 |
| | | 31-50% | H | 640 |
| | | 51-80% | H | 554 |
| | Elderly | 0-30% | H | 1,074 |
| | | 31-50% | H | 1,101 |
| | | 51-80% | H | 915 |
| | All Other | 0-30% | M | 1,446 |
| | | 31-50% | M | 1,415 |
| | | 51-80% | M | 1.156 |
| Non-Homeless Special Needs | Elderly | 0-80% | H | 11,446 |
| | Frail Elderly | 0-80% | H | 1,223 |
| | Severe Mental Illness | 0-80% | H | 2,879 |
| | Physical Disability | 0-80% | H | 575 |
| | Developmental Disability | 0-80% | H | 1,248 |
| | Alcohol/Drug Abuse | 0-80% | H | 3,069 |
| | HIV/AIDS | 0-80% | M | 278 |
| | Victims of Domestic Violence | 0-80% | H | 218 |

Non-Homeless Special Needs Data Source – Oregon Office of Housing & Community Service Report 2/19/10
All others - HUD CHAS database
2011-2016 Clackamas County Consolidated Plan

**Attachment D**
**Strategy for Addressing Housing Needs**

## Introduction

The Housing Authority of Clackamas County (HACC) is committed to affirmatively furthering fair housing and contributing to the elimination of impediments to fair housing choice as described in 24 CFR Part 570.601 and the Furthering Fair Housing Executive Order 11063, as amended by Executive Order 12259.

Currently the Clackamas County Housing and Community Division (HCD), is working with local Fair Housing Partners and is participating in a Regional Fair Housing Collaboration. HCD is comprised of HACC and Community Development (CD)

## LOCAL EFFORTS

HCD assembled a Fair Housing Partners group to identify goals and strategies to improve housing choices in Clackamas County. HCD's Fair Housing local partners include; the cities, towns and hamlets in Clackamas County, Clackamas County Social Services Division (SSD), Clackamas County Department of Transportation and Development (DTD), the Fair Housing Council of Oregon (FHCO) and, Legal Aid Services of Oregon (LASO).

Six (6) general fair housing goals were identified:

Goal I: Fair housing laws are enforced
Goal II: People and agencies/institutions know about fair housing
Goal III: Integrative patterns are promoted
Goal IV: Fair housing is attained regionally
Goal V: All rental housing is habitable
Goal VI: Actions are guided by local and regional data

## REGIONAL EFFORTS

Clackamas County meets quarterly with regional partners to coordinate fair housing efforts, data collection, training and events. Regional partners include: Multnomah County, Washington County, Clark County (WA), City of Portland, City of Gresham, and the City of Beaverton. In addition, there are several agencies that provide fair housing service in the county, including the United States Department of Housing and Urban Development, The Fair Housing Council of Oregon, Legal Aid Services of Oregon and Clackamas County Social Services Division, Housing Rights and Resources Program.

Regional partners intend to move to a regional Analysis of Impediments to Fair Housing study and regional data collection in order to plan more effective training events and strategies to reduce housing discrimination and increase housing choice for residents in the Portland metropolitan area housing market. Regional partners are also working to align their fair housing efforts with the public housing authorities plans to increase access to housing.

**Statewide Goals of the Fair Housing Council of Oregon:**

The Fair Housing Council of Oregon (FHCO) has contracts with the state of Oregon and with several local governments to provide fair housing training to tenants and landlords. FHCO has assembled a group of fair housing partners to coordinate fair housing activities, training and events. The first meeting was held on May 6, 2014 to discuss needs for education and outreach, audit testing needs (to find out if landlords are discriminating against protected classes of people) and, other identified by local agencies. FHCO is also being asked by partners to collect and analyze housing discrimination data to report out to partners.

**Oregon state laws have changed to prohibit source of income in Section 8**

Effective July 1, 2014, landlords cannot refuse to rent to an applicant, or treat an applicant or tenant differently, because the applicant is using a Section 8 voucher or other local, state, or federal rental housing assistance. Nor can landlords advertise "no Section 8." Landlords can still screen and reject any applicant, including those with a Section 8 voucher, for past conduct and ability to pay rent.

Prior to passage of House Bill 2639 in 2013, the "source of income" category explicitly excluded federal rent assistance, which primarily refers to the Section 8 Housing Choice Voucher program; this exclusion meant that Oregon landlords could refuse to rent to applicants, or even to consider them, just because they had a Section 8 voucher. The new law removed that exception and explicitly stated that Section 8 or any other local, state, or federal housing assistance is included in the source of income protection. Oregon Revised Statute 659A.421 (1) (d).

The new law also creates the Housing Choice Landlord Guarantee Program, to compensate landlords for damages incurred as a result of tenancies by Section 8 voucher holders.

**Clackamas County Actions Taken in 2013-2014 and Analysis of Impact**

| **Strategy** | Primary Partners (Lead in **BOLD**) | Accomplishments |
|---|---|---|
| **Commit to countywide and regional support to continue and enhance enforcement of fair housing laws** | **SSD**<br>HACC<br>CD | SSD has annual contracts with the Fair Housing Council of Oregon FHCO ($10,770) and Legal Aid Services of Oregon (LASO) ($81,250) to provide enforcement of fair housing laws. FHCO assisted 209 people with housing information. 31 (15%) were Latino and 12 (6%) were African American.<br>CD is meeting regularly with regional partners to discuss audit testing options. |

| | | |
|---|---|---|
| **Improve access to fair housing information** | SSD<br>**CD**<br>HACC | HCD has met with regional partners and the Fair Housing Council of Oregon to coordinate Fair Housing activities, develop a centralized resource and to develop fair housing materials in multiple languages and formats. |
| **Expand opportunities for tenants using Housing Choice Vouchers** | **HACC** | The Housing Authority of Clackamas County has landlord outreach materials posted on the HACC website: http://www.clackamas.us/housingauthority/<br><br>2014 Landlord Training Events:<br>April 7th, 2014- Oregon Landlord Tenant Law<br>May 30th, 2014- HB 2639 New Section 8 Law<br><br>Outreach for all of these events were done by the following:<br>• Direct email invitations to our landlord email list<br>• Announcements on the Metro Multi Family Calendar of events<br>• Fair Housing Council of Oregon Announcements<br>• Promoted on HACC Website<br>• Word of mouth through property management companies, etc<br><br>**Landlord Newsletters** were distributed to all landlords in Summer 2013, Fall -Winter 2013/14 and Spring 2014. The newsletters are posted at the HACC website. |
| **Ensure that the Housing Authority of Clackamas County includes wait list and housing recipients data for the annual Fair Housing report** | **HACC** | The April 2014 HACC waitlist for housing vouchers has 1,750 households. 287 (16%) are elderly and 633 (36%) have disabilities. 185 (10%) are Black, 94(5%) are Hispanic, 41(2%) are Native American and 45 (3%) are Asian or Pacific Islanders. 1,572 (90%) are in extremely low income households. |

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

ATTACHMENT E

U.S Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 06/30/2017

## Part I: Summary

| PHA Name: | Grant Type and Number | FFY of Grant: 2015 |
|---|---|---|
| Housing Authority of Clackamas County | Capital Fund Program Grant No: OR16P00150115 Replacement Housing Factor Grant No: | FFY of Grant Approval: |
| | Date of CFFP: | |

**Type of Grant**
[X ] 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[1] | |
|---|---|---|---|---|---|
| | | Original | Revised[2] | Obligated | Expended |
| 1 | Total Non-CFP Funds | $ - | $ - | $ - | $ - |
| 2 | 1406 Operations (may not exceed 20% of line 20)[3] | $ 175,775.00 | $ - | $ - | $ - |
| 3 | 1408 Management Improvements | $ 1,000.00 | $ - | $ - | $ - |
| 4 | 1410 Administration (may not exceed 10% of line 20) | $ 129,780.00 | $ - | $ - | $ - |
| 5 | 1411 Audit | $ 6,500.00 | $ - | $ - | $ - |
| 6 | 1415 Liquidated Damages | $ - | $ - | $ - | $ - |
| 7 | 1430 Fees and Costs | $ 22,500.00 | $ - | $ - | $ - |
| 8 | 1440 Site Acquisition | $ - | $ - | $ - | $ - |
| 9 | 1450 Site Improvement | $ 50,000.00 | $ - | $ - | $ - |
| 10 | 1460 Dwelling Structures | $ 397,500.00 | $ - | $ - | $ - |
| 11 | 1465.1 Dwelling Equipment - Nonexpendable | $ - | $ - | $ - | $ - |
| 12 | 1470 Nondwelling Structures | $ 25,000.00 | $ - | $ - | $ - |
| 13 | 1475 Nondwelling Equipment | $ 61,847.00 | $ - | $ - | $ - |
| 14 | 1485 Demolition | $ - | $ - | $ - | $ - |
| 15 | 1492 Moving to Work Demostration | $ - | $ - | $ - | $ - |
| 16 | 1495.1 Relocation Costs | $ 10,000.00 | $ - | $ - | $ - |
| 17 | 1499 Development Activities[4] | $ - | $ - | $ - | $ - |
| 18a | 1501 Collateralization of Debt Service paid by the PHA | $ - | $ - | $ - | $ - |
| 18ba | 9000 Collateralization or Debt Service paid Via System of Direct Payment | $ - | $ - | $ - | $ - |
| 19 | 1502 Contingency (may not exceed 8% of line 20) | $ - | $ - | $ - | $ - |
| 20 | Amount of Annual Grant: (sum of lines 2-19) | $ 879,902.00 | $ - | $ - | $ - |
| 21 | Amount of line 20 Related to LBP Activities | $ - | $ - | $ - | $ - |
| 22 | Amount of line 20 Related to Section 504 Activities | $ - | $ - | $ - | $ - |
| 23 | Amount of line 20 Related to Security -- Soft Costs | $ - | $ - | $ - | $ - |
| 24 | Amount of line 20 Related to Security -- Hard Costs | $ - | $ - | $ - | $ - |
| 25 | Amount of line 20 Related to Energy Conservation Measures | $25,000.00 | $ - | $ - | $ - |

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

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

U.S Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
**Expires 06/30/2017**

## Part I: Summary

| PHA Name: | Grant Type and Number | | FFY of Grant: 2015 |
|---|---|---|---|
| Housing Authority of Clackamas County | Capital Fund Program Grant No: **OR16P00150115**<br>Date of CFFP: | Replacement Housing Factor Grant No: | FFY of Grant Approval: |

**Type of Grant**
**[ X ] 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[1] | |
|---|---|---|---|---|---|
| | | Original | Revised[2] | Obligated | Expended |

| Signature of Executive Director | Date | Signature of Public Housing Director | Date |
|---|---|---|---|
| | | | |

ATTACHMENT E



## Part II: Supporting Pages

| PHA Name: Housing Authority of Clackamas County | Grant Type and Number: Capital Fund Program Grant No: OR16P00150115 CFFP (Yes/No:) Replacement Housing Factor Grant No: | Federal FY of Grant: 2015 |
|---|---|---|

| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Develpment Account No. | Qty | Total Estimated Cost | | Total Actual Cost | | Status of Work |
|---|---|---|---|---|---|---|---|---|
| | | | | Original | Revised [1] | Funds Obligated [2] | Funds Expended [2] | |
| **AMP-wide Operations** | 1. Operations | 1406 | 1 | $175,775.00 | $0.00 | $0.00 | $0.00 | |
| | **SUB-TOTAL** | **1406** | | **$175,775.00** | **$0.00** | **$0.00** | **$0.00** | |
| **AMP-wide Mgmt. Improve.** | 1. STAFF: Resident Services Salary & Benefits | 1408 | 100% | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 2. STAFF: Asset Manager Salary & Benefits | 1408 | 5% | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 3. STAFF: Youth Services Salary & Benefits/Activities/Contracts | 1408 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 4. STAFF: Service Coordinator Salary & Benefits | 1408 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 5. TRAINING: Staff Training Improvement | 1408 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 6. Travel for Resident Services Specialist(s) | 1408 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 7. Software: Operating Systems & Office Software - Soft Costs | 1408 | 1 | $1,000.00 | $0.00 | $0.00 | $0.00 | |
| | 8. TRAINING: Resident Training related to Agency Plan resident partnership process | 1408 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **SUB-TOTAL** | **1408** | | **$1,000.00** | **$0.00** | **$0.00** | **$0.00** | |
| **AMP-wide Admin.** | 1. Central Office Cost Center (COCC) Salary & Benefits | 1410 | 100% | $87,750.00 | $0.00 | $0.00 | $0.00 | |
| | 2. CFP Capital Improvement Specialist Salary & Benefits - A&E Design Work | 1410 | 35% | $42,030.00 | $0.00 | $0.00 | $0.00 | In-house A&E work exempted from 10% max Admin costs per - 968.112 (n) (2) (ii) |
| | **SUB-TOTAL** | **1410** | | **$129,780.00** | **$0.00** | **$0.00** | **$0.00** | |
| **Audit** | 1. Financial Audit | 1411 | 100% | $6,500.00 | $0.00 | $0.00 | $0.00 | |
| | **SUB-TOTAL** | **1411** | | **$6,500.00** | **$0.00** | **$0.00** | **$0.00** | |
| **AMP-wide Fees & Costs** | 1. Architectural, Engineering, Consulting Services | 1430 | 1 | $15,000.00 | $0.00 | $0.00 | $0.00 | |
| | 2. Asbestos/Mold Testing/Remediation: Dev. 001 - 021 | 1430 | 1 | $7,500.00 | $0.00 | $0.00 | $0.00 | |
| | 3. Printing RFP's, Bid documents, other project related expenses | 1430 | 50 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **SUB-TOTAL** | **1430** | | **$22,500.00** | **$0.00** | **$0.00** | **$0.00** | |

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

ATTACHMENT E

**Part II: Supporting Pages**

| Name: Housing Authority of Clackamas County | Grant Type and Number: Capital Fund Program Grant No: OR16P00150115; Replacement Housing Factor Grant No: | CFFP (Yes/No:) | Federal FY of Grant: 2015 |
|---|---|---|---|

| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Develpment Account No. | Qty. | Total Estimated Cost | | Total Actual Cost | | Status of Work |
|---|---|---|---|---|---|---|---|---|
| | | | | Original | Revised [1] | Funds Obligated [2] | Funds Expended [2] | |
| **AMP-wide Site Improve.** | 1. PHA-Wide Sitework, site paving, fencing, landscaping, site utilities at vacancy and 504 Accessibility Accommodations | 1450 | 25 | $0.00 | $0.00 | $0.00 | $0.00 | CFP Modernization at vacancy or at accommodation request - AMP to be determined at vacancy or upon accommodation request and modernization to be completed in phases |
| | **SUB-TOTAL** | **1450** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| **AMP-wide Dwelling Improve.** | 1. PHA-Wide Dwelling Improvements to include cabinets, flooring, doors, garage doors, plumbing, HVAC, siding, chimney removal, windows, roofs, kitchens, attached porches and patios at vacancy, and 504 Accessibility Accommodations | 1460 | 10 | $0.00 | $0.00 | $0.00 | $0.00 | CFP Modernization at vacancy or at accommodation request - AMP to be determined at vacancy or upon accommodation request and modernization to be completed in phases |
| | **SUB-TOTAL** | **1460** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| **AMP-wide Dwelling Equipment** | 1. Ranges & Refrigerators | 1465 | 0 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **SUB-TOTAL** | **1465** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| **AMP-1 Non Dwelling Structures** | Community Center Dwelling | 1470 | | | $0.00 | $0.00 | $0.00 | |
| | a. Dwelling Renovation (Flooring, HVAC, Windows, Siding, Cabinets, Paint, etc.) | 1470 | 1 | $25,000.00 | $0.00 | $0.00 | $0.00 | |
| | **SUB-TOTAL** | **1470** | | **$25,000.00** | **$0.00** | **$0.00** | **$0.00** | |
| **PHA-wide Non-Dwelling Equipment** | 1. Computers & Equipment | 1475 | 2 | $12,500.00 | $0.00 | $0.00 | $0.00 | |
| | 2. Maintenance Vehicles & Equip | 1475 | 1 | $49,347.00 | $0.00 | $0.00 | $0.00 | |
| | 3. Copier | 1475 | | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **SUB-TOTAL** | **1475** | | **$61,847.00** | **$0.00** | **$0.00** | **$0.00** | |
| **PHA-wide Relocation Costs** | 1. Relocation costs due to modernization activities | 1495 | 25 | $10,000.00 | $0.00 | $0.00 | $0.00 | |
| | **SUB-TOTAL** | **1495** | | **$10,000.00** | **$0.00** | **$0.00** | **$0.00** | |
| | **Asset Management Properties (AMP)** | | | | | | | |
| **AMP 2 - DEV 007 Scattered Sites** | 1. SITEWORK | 1450 | | | | | | |
| | a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.) | 1450 | 1 | $20,000.00 | $0.00 | $0.00 | $0.00 | |
| | **DEV #007 1450 SUB TOTAL** | **1450** | | **$20,000.00** | **$0.00** | **$0.00** | **$0.00** | |
| | 1. DWELLING STRUCTURES | 1460 | | | | | | |
| | a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.) | 1460 | 1 | $72,500.00 | $0.00 | $0.00 | $0.00 | |
| | b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.) | 1460 | 1 | $5,000.00 | $0.00 | $0.00 | $0.00 | |
| | **DEV #007 1460 SUB TOTAL** | **1460** | | **$77,500.00** | **$0.00** | **$0.00** | **$0.00** | |
| | **DEV #007 TOTAL** | | | **$97,500.00** | **$0.00** | **$0.00** | **$0.00** | |

[1] To be completed for the Performance and Evaluation Report or a Revised Annual statement

[2] To be completed for the Performance and Evaluation Report

ATTACHMENT E

## Part II: Supporting Pages

| PHA Name: Housing Authority of Clackamas County | Grant Type and Number: Capital Fund Program Grant No: OR16P00150115; Replacement Housing Factor Grant No: | CFFP (Yes/No:) | Federal FY of Grant: 2015 |
|---|---|---|---|

| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Develpment Account No. | Qty | Total Estimated Cost | | Total Actual Cost | | Status of Work |
|---|---|---|---|---|---|---|---|---|
| | | | | Original | Revised [1] | Funds Obligated [2] | Funds Expended [2] | |
| AMP 2 - DEV 010 Scattered Sites | a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.) | 1450 | | $0.00 | $0.00 | $0.00 | $0.00 | |
| | DEV #010 1450 SUB TOTAL | 1450 | | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 1. DWELLING STRUCTURES | 1460 | | | | | | |
| | a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.) | 1460 | 1 | $75,000.00 | $0.00 | $0.00 | $0.00 | |
| | b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.) | 1460 | 1 | $5,000.00 | $0.00 | $0.00 | $0.00 | |
| | DEV #010 1460 SUB TOTAL | 1460 | | $80,000.00 | $0.00 | $0.00 | $0.00 | |
| | DEV #010 TOTAL | | | $80,000.00 | $0.00 | $0.00 | $0.00 | |
| AMP 2 - DEV 012 Scattered | 1. SITEWORK | 1450 | | | | | | |
| | a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.) | 1450 | 1 | $20,000.00 | $0.00 | $0.00 | $0.00 | |
| | DEV #012 1450 SUB TOTAL | 1450 | | $20,000.00 | $0.00 | $0.00 | $0.00 | |
| | 1. DWELLING STRUCTURES | 1460 | | | | | | |
| | a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.) | 1460 | 1 | $75,000.00 | $0.00 | $0.00 | $0.00 | |
| | b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.) | 1460 | 1 | $5,000.00 | $0.00 | $0.00 | $0.00 | |
| | DEV #012 1460 SUB TOTAL | 1460 | | $80,000.00 | $0.00 | $0.00 | $0.00 | |
| | DEV #012 TOTAL | | | $100,000.00 | $0.00 | $0.00 | $0.00 | |
| AMP 2 - DEV 019 Scattered | a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.) | 1450 | | $0.00 | $0.00 | $0.00 | $0.00 | |
| | DEV #019 1450 SUB TOTAL | 1450 | | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 1. DWELLING STRUCTURES | 1460 | | | | | | |
| | a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.) | 1460 | 1 | $75,000.00 | $0.00 | $0.00 | $0.00 | |
| | b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.) | 1460 | 1 | $5,000.00 | $0.00 | $0.00 | $0.00 | |
| | DEV #019 1460 SUB TOTAL | 1460 | | $80,000.00 | $0.00 | $0.00 | $0.00 | |
| | DEV #019 TOTAL | | | $80,000.00 | $0.00 | $0.00 | $0.00 | |
| AMP 2 - DEV 020 Scattered | a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.) | 1450 | 1 | $10,000.00 | $0.00 | $0.00 | $0.00 | |
| | DEV #020 1450 SUB TOTAL | 1450 | | $10,000.00 | $0.00 | $0.00 | $0.00 | |
| | 1. DWELLING STRUCTURES | 1460 | | | | | | |
| | a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.) | 1460 | 1 | $75,000.00 | $0.00 | $0.00 | $0.00 | |
| | b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.) | 1460 | 1 | $5,000.00 | $0.00 | $0.00 | $0.00 | |
| | DEV #020 1460 SUB TOTAL | 1460 | | $80,000.00 | $0.00 | $0.00 | $0.00 | |
| | DEV #020 TOTAL | | | $90,000.00 | $0.00 | $0.00 | $0.00 | |
| | | | | | | | | |
| | GRAND TOTAL | | | $879,902.00 | $0.00 | $0.00 | $0.00 | |

[1] To be completed for the Performance and Evaluation Report or a Revised Annual statement

[2] To be completed for the Performance and Evaluation Report

## Part III: Implemetation Schedule for Capital Fund Financing Program

**PHA Name:**
Housing Authority of Clackamas County

**Federal FY of Grant:**
**2015**

| Development Number Name/HA-Wide Activities | All Funds Obligated (Quarter Ending Date) | | All Funds Expended (Quarter Ending Date) | | Reasons for Revised Target Dates [1] |
|---|---|---|---|---|---|
| | Original | Actual | Original | Actual | |
| PHA-Wide Operations | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Mgmt. Improvem'ts | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Admin. | 9/9/2017 | | 9/9/2019 | | |
| Costs | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Site Improvements | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Dwelling Improvements | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Dwelling Equipment | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Non-Dwelling Equipment | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Relocation | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Contingency | 9/9/2017 | | 9/9/2019 | | |
| Heights | 9/9/2017 | | 9/9/2019 | | |
| 003 - Hillside park | 9/9/2017 | | 9/9/2019 | | |
| 004 - OCVM | 9/9/2017 | | 9/9/2019 | | |
| 005 - Hillside Manor | 9/9/2017 | | 9/9/2019 | | |
| 007 - Scattered Site | 9/9/2017 | | 9/9/2019 | | |
| 010 - Scattered Site | 9/9/2017 | | 9/9/2019 | | |
| 012 - Scattered Site | 9/9/2017 | | 9/9/2019 | | |
| 019 - Scattered Site | 9/9/2017 | | 9/9/2019 | | |
| 020 - Scattered Site | 9/9/2017 | | 9/9/2019 | | |
| | | | | | |

[1] Obligation and expenditure end dated can only be revised with HUD approval pursuant to Section 9j of the U.S. Housing act of 1937, as amended.

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

ATTACHMENT E

U.S Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 06/30/2017

## Part I: Summary

| PHA Name: | Grant Type and Number | FFY of Grant: 2015 |
|---|---|---|
| Housing Authority of Clackamas County | Capital Fund Program Grant No: OR16R00150115 Replacement Housing Factor Grant No: | FFY of Grant Approval: |
| | Date of CFFP: | |

**Type of Grant**
[X ] Original Annual Statement [ ] Reserve for Disasters/Emergencies [ ] Revised Annual Statement (revision no: 01 )
[ ] Performance and Evaluation Report for Period Ending: [ ] Final Performance and Evaluation Report

| Line | Summary by Development Account | Total Estimated Cost | | Total Actual Cost[1] | |
|---|---|---|---|---|---|
| | | Original | Revised[2] | Obligated | Expended |
| 1 | Total Non-CFP Funds | $ - | $ - | $ - | $ - |
| 2 | 1406 Operations (may not exceed 20% of line 20)[3] | $ - | $ - | $ - | $ - |
| 3 | 1408 Management Improvements | $ - | $ - | $ - | $ - |
| 4 | 1410 Administration (may not exceed 10% of line 20) | $ - | $ - | $ - | $ - |
| 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 | 1492 Moving to Work Demostration | $ - | $ - | $ - | $ - |
| 16 | 1495.1 Relocation Costs | $ - | $ - | $ - | $ - |
| 17 | 1499 Development Activities[4] | $ 29,467.00 | $ - | $ - | $ - |
| 18a | 1501 Collateralization of Debt Service paid by the PHA | $ - | $ - | $ - | $ - |
| 18ba | 9000 Collateralization or Debt Service paid Via System of Direct Payment | $ - | $ - | $ - | $ - |
| 19 | 1502 Contingency (may not exceed 8% of line 20) | $ - | $ - | $ - | $ - |
| 20 | Amount of Annual Grant: (sum of lines 2-19) | $ 29,467.00 | $ - | $ - | $ - |
| 21 | Amount of line 20 Related to LBP Activities | $ - | $ - | $ - | $ - |
| 22 | Amount of line 20 Related to Section 504 Activities | $ - | $ - | $ - | $ - |
| 23 | Amount of line 20 Related to Security -- Soft Costs | $ - | $ - | $ - | $ - |
| 24 | Amount of line 20 Related to Security -- Hard Costs | $ - | $ - | $ - | $ - |
| 25 | Amount of line 20 Related to Energy Conservation Measures | $ - | $ - | $ - | $ - |

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

ATTACHMENT E

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

U.S Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
**Expires 06/30/2017**

## Part I: Summary

| PHA Name: | Grant Type and Number | | FFY of Grant: 2015 |
|---|---|---|---|
| Housing Authority of Clackamas County | Capital Fund Program Grant No: OR16R00150115<br>Date of CFFP: | Replacement Housing Factor Grant No: | FFY of Grant Approval: |

**Type of Grant**
[ X ] 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[1] | |
|---|---|---|---|---|---|
| | | Original | Revised[2] | Obligated | Expended |

| Signature of Executive Director | Date | Signature of Public Housing Director | Date |
|---|---|---|---|
| | | | |

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

ATTACHMENT E

U.S Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 06/30/2017

## Part II: Supporting Pages

| PHA Name: Housing Authority of Clackamas County | Grant Type and Number: Capital Fund Program Grant No: OR16R00150115; Replacement Housing Factor Grant No: | CFFP (Yes/No:) | Federal FY of Grant: 2015 |
|---|---|---|---|

| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Develpment Account No. | Qty | Total Estimated Cost | | Total Actual Cost | | Status of Work |
|---|---|---|---|---|---|---|---|---|
| | | | | Original | Revised [1] | Funds Obligated [2] | Funds Expended [2] | |
| AMP-wide Operations | 1. Operations | 1406 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | SUB-TOTAL | 1406 | | $0.00 | $0.00 | $0.00 | $0.00 | |
| AMP-wide Mgmt. Improve. | 1. STAFF: Resident Services Salary & Benefits | 1408 | 100% | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 2. STAFF: Asset Manager Salary & Benefits | 1408 | 5% | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 3. STAFF: Youth Services Salary & Benefits/Activities/Contracts | 1408 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 4. STAFF: Service Coordinator Salary & Benefits | 1408 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 5. TRAINING: Staff Training Improvement | 1408 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 6. Travel for Resident Services Specialist(s) | 1408 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 7. Software: Operating Systems & Office Software - Soft Costs | 1408 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 8. TRAINING: Resident Training related to Agency Plan resident partnership process | 1408 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | SUB-TOTAL | 1408 | | $0.00 | $0.00 | $0.00 | $0.00 | |
| AMP-wide Admin. | 1. Central Office Cost Center (COCC) Salary & Benefits | 1410 | 100% | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 2. CFP Capital Improvement Specialist Salary & Benefits - A&E Design Work | 1410 | 35% | $0.00 | $0.00 | $0.00 | $0.00 | In-house A&E work exempted from 10% max Admin costs per - 968.112 (n) (2) (ii) |
| | SUB-TOTAL | 1410 | | $0.00 | $0.00 | $0.00 | $0.00 | |
| Audit | 1. Financial Audit | 1411 | 100% | $0.00 | $0.00 | $0.00 | $0.00 | |
| | SUB-TOTAL | 1411 | | $0.00 | $0.00 | $0.00 | $0.00 | |
| AMP-wide Fees & Costs | 1. Architectural, Engineering, Consulting Services | 1430 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 2. Asbestos/Mold Testing/Remediation: Dev. 001 - 021 | 1430 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 3. Printing RFP's, Bid documents, other project related expenses | 1430 | 50 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | SUB-TOTAL | 1430 | | $0.00 | $0.00 | $0.00 | $0.00 | |

1 To be completed for the Performance and Evaluation Report or a Revised Annual statement

2 To be completed for the Performance and Evaluation Report

ATTACHMENT E

**Part II: Supporting Pages**

| PHA Name: Housing Authority of Clackamas County | Grant Type and Number: Capital Fund Program Grant No: OR16R0015011; Replacement Housing Factor Grant No: | CFFP (Yes/No:) | Federal FY of Grant: 2015 |
|---|---|---|---|

| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Develpment Account No. | Qty | Total Estimated Cost | | Total Actual Cost | | Status of Work |
|---|---|---|---|---|---|---|---|---|
| | | | | Original | Revised [1] | Funds Obligated [2] | Funds Expended [2] | |
| **AMP-wide Site Improve.** | 1. PHA-Wide Sitework, site paving, fencing, landscaping, site utilities at vacancy and 504 Accessibility Accommodations | 1450 | 25 | $0.00 | $0.00 | $0.00 | $0.00 | CFP Modernization at vacancy or at accommodation request - AMP to be determined at vacancy or upon accommodation request and modernization to be completed in phases |
| | **SUB-TOTAL** | **1450** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| **AMP-wide Dwelling Improve.** | 1. PHA-Wide Dwelling Improvements to include cabinets, flooring, doors, garage doors, plumbing, HVAC, siding, chimney removal, windows, roofs, kitchens, attached porches and patios at vacancy, and 504 Accessibility Accommodations | 1460 | 10 | $0.00 | $0.00 | $0.00 | $0.00 | CFP Modernization at vacancy or at accommodation request - AMP to be determined at vacancy or upon accommodation request and modernization to be completed in phases |
| | **SUB-TOTAL** | **1460** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| **AMP-wide Dwelling Equipment** | 1. Ranges & Refrigerators | 1465 | 0 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **SUB-TOTAL** | **1465** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| **AMP-3 Non Dwelling Structures** | Community Center Dwelling | 1470 | | | $0.00 | $0.00 | $0.00 | |
| | a. Dwelling Renovation (Flooring, HVAC, Windows, Siding, Cabinets, Paint, etc.) | 1470 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **SUB-TOTAL** | **1470** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| **PHA-wide Non-Dwelling Equipment** | 1. Computers & Equipment | 1475 | 2 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 2. Maintenance Vehicles & Equip | 1475 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | 3. Copier | 1475 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **SUB-TOTAL** | **1475** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| **PHA-wide Relocation Costs** | 1. Relocation costs due to modernization activities | 1495 | 25 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **SUB-TOTAL** | **1495** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| | **Asset Management Properties (AMP)** | | | | | | | |
| **AMP 1 - DEV 001 Clackamas Heights** | 1. SITEWORK | 1450 | | | | | | |
| | a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.) | 1450 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **DEV #001 1450 SUB TOTAL** | **1450** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| | 1. DWELLING STRUCTURES | 1460 | | | | | | |
| | a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.) | 1460 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **DEV #001 1460 SUB TOTAL** | **1460** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| | **DEV #007 TOTAL** | | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| **AMP 2 - DEV 007 Scattered Sites** | 1. SITEWORK | 1450 | | | | | | |
| | a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.) | 1450 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **DEV #007 1450 SUB TOTAL** | **1450** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| | 1. DWELLING STRUCTURES | 1460 | | | | | | |
| | a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.) | 1460 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.) | 1460 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **DEV #007 1460 SUB TOTAL** | **1460** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| | **DEV #007 TOTAL** | | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |

1 To be completed for the Performance and Evaluation Report or a Revised Annual statement

2 To be completed for the Performance and Evaluation Report

ATTACHMENT E

**Part II: Supporting Pages**

| PHA Name: Housing Authority of Clackamas County | Grant Type and Number: Capital Fund Program Grant No: OR16R00150115 CFFP (Yes/No:) Replacement Housing Factor Grant No: | Federal FY of Grant: 2015 |
|---|---|---|

| Development Number Name/HA-Wide Activities | General Description of Major Work Categories | Develpment Account No. | Qty | Total Estimated Cost | | Total Actual Cost | | Status of Work |
|---|---|---|---|---|---|---|---|---|
| | | | | Original | Revised 1 | Funds Obligated 2 | Funds Expended 2 | |
| AMP 2 - DEV 010 Scattered Sites | a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.) | 1450 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **DEV #010 1450 SUB TOTAL** | **1450** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| | 1. DWELLING STRUCTURES | 1460 | | | | | | |
| | a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.) | 1460 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.) | 1460 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **DEV #010 1460 SUB TOTAL** | **1460** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| | **DEV #010 TOTAL** | | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| AMP 2 - DEV 012 Scattered | 1. SITEWORK | 1450 | | | | | | |
| | a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.) | 1450 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **DEV #012 1450 SUB TOTAL** | **1450** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| | 1. DWELLING STRUCTURES | 1460 | | | | | | |
| | a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.) | 1460 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.) | 1460 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **DEV #012 1460 SUB TOTAL** | **1460** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| | **DEV #012 TOTAL** | | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| AMP 2 - DEV 019 Scattered | a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.) | 1450 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **DEV #019 1450 SUB TOTAL** | **1450** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| | 1. DWELLING STRUCTURES | 1460 | | | | | | |
| | a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.) | 1460 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.) | 1460 | 1 | $0.00 | $0.00 | $0.00 | $0.00 | |
| | **DEV #019 1460 SUB TOTAL** | **1460** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| | **DEV #019 TOTAL** | | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | |
| | **DEVELOPMENT ACTIVITIES** | | | | | | | |
| **AMP 1 - Dev 01 Clackamas Heights** | Accumulation for future PH units @ Clackamas Heights | 1499 | 1 | $29,740.00 | $0.00 | $0.00 | $0.00 | |
| | **Dev #01 1499 SUB TOTAL** | **1499** | | **$29,467.00** | **$0.00** | **$0.00** | **$0.00** | |
| | **GRAND TOTAL** | | | **$29,467.00** | **$0.00** | **$0.00** | **$0.00** | |

1 To be completed for the Performance and Evaluation Report or a Revised Annual statement

2 To be completed for the Performance and Evaluation Report

ATTACHMENT E



## Part III: Implemetation Schedule for Capital Fund Financing Program

**PHA Name:**
Housing Authority of Clackamas County

**Federal FY of Grant:**
2015

| Development Number Name/HA-Wide Activities | All Funds Obligated (Quarter Ending Date) | | All Funds Expended (Quarter Ending Date) | | Reasons for Revised Target Dates [1] |
|---|---|---|---|---|---|
| | Original | Actual | Original | Actual | |
| PHA-Wide Operations | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Mgmt. Improvem'ts | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Admin. | 9/9/2017 | | 9/9/2019 | | |
| Costs | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Site Improvements | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Dwelling Improvements | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Dwelling Equipment | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Non-Dwelling Equipment | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Relocation | 9/9/2017 | | 9/9/2019 | | |
| PHA-Wide Contingency | 9/9/2017 | | 9/9/2019 | | |
| Heights | 9/9/2017 | | 9/9/2019 | | |
| 003 - Hillside park | 9/9/2017 | | 9/9/2019 | | |
| 004 - OCVM | 9/9/2017 | | 9/9/2019 | | |
| 005 - Hillside Manor | 9/9/2017 | | 9/9/2019 | | |
| 007 - Scattered Site | 9/9/2017 | | 9/9/2019 | | |
| 010 - Scattered Site | 9/9/2017 | | 9/9/2019 | | |
| 012 - Scattered Site | 9/9/2017 | | 9/9/2019 | | |
| 019 - Scattered Site | 9/9/2017 | | 9/9/2019 | | |
| 020 - Scattered Site | 9/9/2017 | | 9/9/2019 | | |
| Development | 9/9/2017 | | 9/9/2019 | | |

[1] Obligation and expenditure end dated can only be revised with HUD approval pursuant to Section 9j of the U.S. Housing act of 1937, as amended.

# Capital Fund Program - Five Year Action Plan

ATTACHMENT F

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
Expires 8/30/2011

## Part I: Summary

PHA Name/Number: **Housing Authority of Clackamas Co.** | Locality: **Oregon City/Clackamas/Oregon** | ☑ Original 5-Year Plan ☐ Revision No:

| A | Development Number and Name | Work Statement for year 1 FFY 2015 | Work Statement of Year 2 FFY 2016 | Work Statement of Year 3 FFY 2017 | Work Statement of Year 4 FFY 2018 | Work Statement of Year 5 FFY 2019 |
|---|---|---|---|---|---|---|
| | 001 | ANNUAL | $ 7,500.00 | $ 7,500.00 | $ - | |
| | 002 | | $ 450,300.00 | $ 465,300.00 | $ 450,000.00 | $ 447,652.00 |
| | 003 | STATEMENT | $ - | $ - | $ 7,500.00 | $ - |
| | 004 | | $ - | $ - | $ - | $ 7,500.00 |
| | 005 | | $ - | $ - | $ - | $ - |
| B | Physical Improvements Subtotal | | $ 457,800.00 | $ 472,800.00 | $ 457,500.00 | $ 455,152.00 |
| C | Management Improvements | | $ 51,752.00 | $ 50,252.00 | $ 54,002.00 | $ 54,800.00 |
| D | AMP-Wide Non-dwelling Structures and Equipment | | $ - | $ - | | |
| E | Administration | | $ 134,450.00 | $ 135,950.00 | $ 137,500.00 | $ 139,050.00 |
| F | Other | | $ 60,000.00 | $ 45,000.00 | $ 55,000.00 | $ 55,000.00 |
| G | Operations | | $ 175,900.00 | $ 175,900.00 | $ 175,900.00 | $ 175,900.00 |
| H | Demolition | | $ - | $ - | $ - | $ - |
| I | Development | | $ - | $ - | $ - | $ - |
| J | Capital Fund Financing Debt Service | | $ - | $ - | $ - | $ - |
| K | Total CFP Funds | | $ 879,902.00 | $ 879,902.00 | $ 879,902.00 | $ 879,902.00 |
| L | Total Non-CFP Funds | | | | | |
| M | Grand Total | | $ 879,902.00 | $ 879,902.00 | $ 879,902.00 | $ 879,902.00 |



form **HUD-50075.2** (4/2008)

ATTACHMENT F

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

| Work Statement for Year 1 FFY | Work Statement for Year: 2 FFY: 2016 | | | | Work Statement for Year: 3 FFY: 2017 | | | |
|---|---|---|---|---|---|---|---|---|
| | Development Name/Number | General Description of Major Work Categories | Qty | Estimated Cost | Development Name/Number | Major Work Categories | Qty | Estimated Cost |
| See Annual Statement | AMP-1 Clackamas Heights | Non-Dwelling Structure: playgrounds | 1 | $ 7,500.00 | AMP-3 Hillside Park | Non-Dwelling Structure: playgrounds | 1 | $ 7,500.00 |
| | | **Sub-Total AMP-1** | | **$ 7,500.00** | | **Sub-Total AMP-1** | | **$ 7,500.00** |
| | AMP-2 Scattered Sites | Sitework, site paving, fencing landscaping, site utilities at vacancy and 504 Accessibility Accommodations Sitework modern. full remodel (units TBD) | 5 | $ 50,000.00 | AMP-2 Scattered Sites | Sitework, site paving, fencing landscaping, site utilities at vacancy and 504 Accessibility Accommodations Sitework modern. full remodel (units TBD) | 5 | $ 40,000.00 |
| | | Dwell Improve-cabinets, flooring, doors, garage doors, plumb, HVAC, siding chimney removal, windows, roofs, kitchens, attached porches and patios at vacancy, and 504 Accessibility Accommodations Dwelling modern. full remodel (units TBD) | 5 | $ 400,300.00 | | Dwell Improve-cabinets, flooring, doors, garage doors, plumb, HVAC, siding chimney removal, windows, roofs, kitchens, attached porches and patios at vacancy, and 504 Accessibility Accommodations Dwelling modern. full remodel (units TBD) | 5 | $ 425,300.00 |
| | | **Sub-Total AMP-2** | | **$ 450,300.00** | | **Sub-Total AMP-2** | | **$ 465,300.00** |
| | | **Physical Needs Subtotal** | | **$ 457,800.00** | | **Physical Needs Subtotal** | | **$ 472,800.00** |
| | AMP Other | A/E & Consulting | 1 | $ 30,000.00 | AMP Other | A/E & Consulting | 1 | $ 20,000.00 |
| | | AMP-Wide Relocation Costs | 3 | $ 10,000.00 | | AMP-Wide Relocation Costs | 3 | $ 10,000.00 |
| | | Asbestos Testing/Abatement | 5 | $ 10,000.00 | | Asbestos Testing/Abatement | 5 | $ 7,500.00 |
| | | Mold Testing/Remediation | 5 | $ 10,000.00 | | Mold Testing/Remediation | 5 | $ 7,500.00 |
| | | **Sub-Total Other** | | **$ 60,000.00** | | **Sub-Total Other** | | **$ 45,000.00** |
| | | **2016 Grand Total** | | **$ 517,800.00** | | **2017 Grand Total** | | **$ 517,800.00** |

ATTACHMENT F

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
Expires 8/30/2011

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

| Work Statement for Year 1 FFY | Work Statement for Year: 5 FFY: 2018 | | | | Work Statement for Year: 5 FFY: 2019 | | | |
|---|---|---|---|---|---|---|---|---|
| | Development Name/Number | Major Work Categories | Qty | Estimated Cost | Development Name/Number | Major Work Categories | Qty | Estimated Cost |
| See Annual Statement | AMP-4 OCVM | Non-Dwelling Structure: playgrounds | 1 | $ 7,500.00 | AMP-4 OCVM | Non-Dwelling Structure: playgrounds | 1 | $ 7,500.00 |
| | | **Sub-Total AMP-1** | | **$ 7,500.00** | | **Sub-Total AMP-1** | | **$ 7,500.00** |
| | AMP-2 Scattered Sites | Sitework, site paving, fencing landscaping, site utilities at vacancy and 504 Accessibility Accommodations Sitework modern. full remodel (units TBD) | 5 | $ 50,000.00 | AMP-2 Scattered Sites | Sitework, site paving, fencing landscaping, site utilities at vacancy and 504 Accessibility Accommodations Sitework modern. full remodel (units TBD) | 5 | $ 30,000.00 |
| | | Dwell Improve-cabinets, flooring, doors, garage doors, plumb, HVAC, siding chimney removal, windows, roofs, kitchens, attached porches and patios at vacancy, and 504 Accessibility Accommodations Dwelling modern. full remodel (units TBD) | 5 | $ 400,000.00 | | Dwell Improve-cabinets, flooring, doors, garage doors, plumb, HVAC, siding chimney removal, windows, roofs, kitchens, attached porches and patios at vacancy, and 504 Accessibility Accommodations Dwelling modern. full remodel (units TBD) | 5 | $ 417,652.00 |
| | | **Sub-Total AMP-2** | | **$ 450,000.00** | | **Sub-Total AMP-2** | | **$ 447,652.00** |
| | | **Physical Needs Subtotal** | | **$ 457,500.00** | | **Physical Needs Subtotal** | | **$ 455,152.00** |
| | AMP Other | A/E & Consulting | 1 | $ 20,000.00 | AMP Other | A/E & Consulting | 1 | $ 20,000.00 |
| | | AMP-Wide Relocation Costs | 3 | $ 10,000.00 | | AMP-Wide Relocation Costs | 3 | $ 10,000.00 |
| | | Asbestos Testing/Abatement | 5 | $ 12,500.00 | | Asbestos Testing/Abatement | 5 | $ 12,500.00 |
| | | Mold Testing/Remediation | 5 | $ 12,500.00 | | Mold Testing/Remediation | 5 | $ 12,500.00 |
| | | **Sub-Total Other** | | **$ 55,000.00** | | **Sub-Total Other** | | **$ 55,000.00** |
| | | **2018 Grand Total** | | **$ 512,500.00** | | **2019 Grand Total** | | **$ 510,152.00** |

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

| Work Statement for Year 1 FFY | Work Statement for Year: 2 FFY: 2016 | | | Work Statement for Year: 3 FFY: 2017 | | |
|---|---|---|---|---|---|---|
| | Development Name/Number | General Description of Major Work Categories | Estimated Cost | Development Name/Number | General Description of Major Work Categories | Estimated Cost |
| See Annual Statement | **Management Improvements 1408** | Service Coordinator | $ - | **Management Improvements 1408** | Service Coordinator | $ - |
| | | Asset Manager | $ - | | Asset Manager | $ - |
| | | Youth Services Coordinator | $ - | | Youth Services Coordinator | $ - |
| | | Travel for Resident Service Specialist | $ - | | Travel for Resident Service Specialist | $ - |
| | | Computer Software (Soft Costs) | $ 2,000.00 | | Computer Software (Soft Costs) | $ 2,000.00 |
| | | Computer Systems/Maint Equipment | $3,000.00 | | Computer Systems/Maint Equipment | $5,000.00 |
| | | Maint Vehicle Truck/Van/Equip | $46,752.00 | | Maint Vehicle Truck/Van/Equip | $43,252.00 |
| | | **Sub-Total Management Improv. - 1408** | **$ 51,752.00** | | **Sub-Total Management Improv. - 1408** | **$ 50,252.00** |
| | **Adminstration 1410** | Central Office Cost Center (COCC) | $ 84,250.00 | **Adminstration 1410** | Central Office Cost Center (COCC) | $ 84,250.00 |
| | | Salary & Benefits | | | Salary & Benefits | |
| | | CFP Capital Improvement Coordinator | | | CFP Capital Improvement Coordinator | |
| | | Salary & Beneifts A&E Services | $ 43,700.00 | | Salary & Beneifts A&E Services | $ 45,200.00 |
| | | **Sub-Total Administration - 1410** | **$ 127,950.00** | | **Sub-Total Administration - 1410** | **$ 129,450.00** |
| | **Audit 1411** | Financial Audit | $ 6,500.00 | **Audit 1411** | Financial Audit | $ 6,500.00 |
| | | **Sub-Total Administration - 1411** | **$ 6,500.00** | | **Sub-Total Administration - 1411** | **$ 6,500.00** |
| | | **2016 Grand Total** | **$ 186,202.00** | | **2017 Grand Total** | **$ 186,202.00** |

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

| Work Statement for Year 1 FFY | Work Statement for Year: 4 FFY: 2018 | | | Work Statement for Year: 5 FFY: 2019 | | |
|---|---|---|---|---|---|---|
| | Development Name/Number | General Description of Major Work Categories | Estimated Cost | Development Name/Number | General Description of Major Work Categories | Estimated Cost |
| See Annual Statement | **Management Improvements 1408** | Service Coordinator | $ - | **Management Improvements 1408** | Service Coordinator | $ - |
| | | Asset Manager | $ - | | Asset Manager | $ - |
| | | Youth Services Coordinator | $ - | | Youth Services Coordinator | $ - |
| | | Travel for Resident Service Specialist | $ - | | Travel for Resident Service Specialist | $ - |
| | | Computer Software (Soft Costs) | $ 2,000.00 | | Computer Software (Soft Costs) | $ 2,000.00 |
| | | Computer Systems/Maint Equipment | $7,500.00 | | Computer Systems/Maint Equipment | $7,500.00 |
| | | Maint Vehicle Truck/Van/Equip | $44,502.00 | | Maint Vehicle Truck/Van/Equip | $45,300.00 |
| | | **Sub-Total Management Improv. - 1408** | **$ 54,002.00** | | **Sub-Total Management Improv. - 1408** | **$ 54,800.00** |
| | **Adminstration 1410** | Central Office Cost Center (COCC) | $ 84,250.00 | **Adminstration 1410** | Central Office Cost Center (COCC) | $ 84,250.00 |
| | | Salary & Benefits | | | Salary & Benefits | |
| | | CFP Capital Improvement Coordinator | | | CFP Capital Improvement Coordinator | |
| | | Salary & Beneifts A&E Services | $ 46,750.00 | | Salary & Beneifts A&E Services | $ 48,300.00 |
| | | **Sub-Total Administration - 1410** | **$ 131,000.00** | | **Sub-Total Administration - 1410** | **$ 132,550.00** |
| | **Audit 1411** | Financial Audit | $ 6,500.00 | **Audit 1411** | Financial Audit | $ 6,500.00 |
| | | **Sub-Total Administration - 1411** | **$ 6,500.00** | | **Sub-Total Administration - 1411** | **$ 6,500.00** |
| | | **2018 Grand Total** | **$ 191,502.00** | | **2019 Grand Total** | **$ 193,850.00** |

| PHA Certifications of Compliance with PHA Plans and Related Regulations | U.S. Department of Housing and Urban Development<br>Office of Public and Indian Housing<br>**Expires 4/30/2011** |
|---|---|

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

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

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

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

PHA Name _____ PHA Number/HA Code _____

_____ 5-Year PHA Plan for Fiscal Years 20____ - 20____

_____ Annual PHA Plan for Fiscal Years 20____ - 20____

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. **Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

| Name of Authorized Official | Title |
|---|---|
| Signature | Date |

# Certification for a Drug-Free Workplace

U.S. Department of Housing and Urban Development

Ap Name

Program/Activity Receiving Federal Grant Funding

Acting on behalf of the above named Applicant as its Authorized Official, I make the following certifications and agreements to the Department of Housing and Urban Development (HUD) regarding the sites listed below:

I certify that the above named Applicant will or will continue to provide a drug-free workplace by:

a. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the Applicant's workplace and specifying the actions that will be taken against employees for violation of such prohibition.

b. Establishing an on-going drug-free awareness program to inform employees ---

(1) The dangers of drug abuse in the workplace;

(2) The Applicant's policy of maintaining a drug-free workplace;

(3) Any available drug counseling, rehabilitation, and employee assistance programs; and

(4) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.

c. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph a.;

d. Notifying the employee in the statement required by paragraph a. that, as a condition of employment under the grant, the employee will ---

(1) Abide by the terms of the statement; and

(2) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;

e. Notifying the agency in writing, within ten calendar days after receiving notice under subparagraph d.(2) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federalagency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant;

f. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph d.(2), with respect to any employee who is so convicted ---

(1) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or

(2) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;

g. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs a. thru f.

**2. Sites for Work Performance.** The Applicant shall list (on separate pages) the site(s) for the performance of work done in connection with the HUD funding of the program/activity shown above: Place of Performance shall include the street address, city, county, State, and zip code. Identify each sheet with the Applicant name and address and the program/activity receiving grant funding.)

Check here ☐ if there are workplaces on file that are not identified on the attached sheets.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

**Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

| Na Authorized Official | Title |
|---|---|
| Signature<br>X | Date |

# DISCLOSURE OF LOBBYING ACTIVITIES

Approved by OMB
0348-0046

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352
(See reverse for public burden disclosure.)

| 1. Type of Federal Action: | 2. Status of Federal Action: | 3. Report Type: |
|---|---|---|
| ☐ a. contract<br>b. grant<br>c. cooperative agreement<br>d. loan<br>e. loan guarantee<br>f. loan insurance | ☐ a. bid/offer/application<br>b. initial award<br>c. post-award | ☐ a. initial filing<br>b. material change<br>**For Material Change Only:**<br>year _____ quarter _____<br>date of last report _____ |

| | |
|---|---|
| **4. Name and Address of Reporting Entity:**<br>☐ Prime ☐ Subawardee<br>Tier _____, *if known*:<br><br>**Congressional District**, *if known*: 4c | **5. If Reporting Entity in No. 4 is a Subawardee, Enter Name and Address of Prime:**<br><br>**Congressional District**, *if known*: |
| **6. Federal Department/Agency:** | **7. Federal Program Name/Description:**<br><br>CFDA Number, *if applicable*: _____ |
| **8. Federal Action Number**, *if known*: | **9. Award Amount**, *if known*:<br>$ |
| **10. a. Name and Address of Lobbying Registrant** (*if individual, last name, first name, MI*): | **b. Individuals Performing Services** (*including address if different from No. 10a*) (*last name, first name, MI*): |
| **11.** Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure. | Signature: _____<br>Print Name: _____<br>Title: _____<br>Telephone No.: _____ Date: _____ |
| **Federal Use Only:** | Authorized for Local Reproduction<br>Standard Form LLL (Rev. 7-97) |

# INSTRUCTIONS FOR COMPLETION OF SF-LLL, DISCLOSURE OF LOBBYING ACTIVITIES

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal action, or a material change to a previous filing, pursuant to title 31 U.S.C. section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.

2. Identify the status of the covered Federal action.

3. Identify the appropriate classification of this report. If this is a followup report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.

4. Enter the full name, address, city, State and zip code of the reporting entity. Include Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or subaward recipient. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants and contract awards under grants.

5. If the organization filing the report in item 4 checks "Subawardee," then enter the full name, address, city, State and zip code of the prime Federal recipient. Include Congressional District, if known.

6. Enter the name of the Federal agency making the award or loan commitment. Include at least one organizational level below agency name, if known. For example, Department of Transportation, United States Coast Guard.

7. Enter the Federal program name or description for the covered Federal action (item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans, and loan commitments.

8. Enter the most appropriate Federal identifying number available for the Federal action identified in item 1 (e.g., Request for Proposal (RFP) number; Invitation for Bid (IFB) number; grant announcement number; the contract, grant, or loan award number; the application/proposal control number assigned by the Federal agency). Include prefixes, e.g., "RFP-DE-90-001."

9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in item 4 or 5.

10. (a) Enter the full name, address, city, State and zip code of the lobbying registrant under the Lobbying Disclosure Act of 1995 engaged by the reporting entity identified in item 4 to influence the covered Federal action.

    (b) Enter the full names of the individual(s) performing services, and include full address if different from 10 (a). Enter Last Name, First Name, and Middle Initial (MI).

11. The certifying official shall sign and date the form, print his/her name, title, and telephone number.

According to the Paperwork Reduction Act, as amended, no persons are required to respond to a collection of information unless it displays a valid OMB Control Number. The valid OMB control number for this information collection is OMB No. 0348-0046. Public reporting burden for this collection of information is estimated to average 10 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0046), Washington, DC 20503.

# Certification of Payments to Influence Federal Transactions

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

Applicant Name

Program/Activity Receiving Federal Grant Funding

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

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

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

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

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

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate.

**Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

| Name of Authorized Official | Title |
|---|---|
| Signature | Date (mm/dd/yyyy) |

# Civil Rights Certification

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

## Civil Rights Certification

## Annual Certification and Board Resolution

*Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairman or other authorized PHA official if there is no Board of Commissioner, I approve the submission of the Plan for the PHA of which this document is a part and make the following certification and agreement with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:*

The PHA certifies that it will carry out the public housing program of the agency in conformity with title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990, and will affirmatively further fair housing.

PHA Name

PHA Number/HA Code

| I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802) | |
|---|---|
| | |
| Name of Authorized Official | Title |
| Signature | Date |

# Certification by State or Local Official of PHA Plans Consistency with the Consolidated Plan

I, Click to Enter Official's Name the Click to Enter Official's Title certify that the Five Year and Annual PHA Plan of the Click to Enter HA Name is consistent with the Consolidated Plan of Click to Enter Juristiction Name prepared pursuant to 24 CFR Part 91.

Signed / Dated by Appropriate State or Local Official