

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

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# PHA Plans

5 Year Plan for Fiscal Years 2005 - 2009

Annual Plan for Fiscal Year 2009

<b>ANNUAL PLAN FY 2009</b>
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**HOUSING AUTHORITY OF THE CITY OF  
FORT MYERS**

**Fiscal Year beginning 04/01/2009**

Submit to HUD January 15, 2009

**NOTE: THIS PHA PLANS TEMPLATE (HUD 50075) IS TO BE COMPLETED IN  
ACCORDANCE WITH INSTRUCTIONS LOCATED IN APPLICABLE PIH NOTICES**

## PHA Plan Agency Identification

**PHA Name:** Housing Authority of the City of Fort Myers  
**PHA Number:** FL047

**PHA Fiscal Year Beginning:** (mm/yyyy) 04/2009

**PHA Programs Administered:**

**Public Housing and Section 8**     **Section 8 Only**     **Public Housing Only**  
Number of public housing units: 557    Number of S8 units:: 1755 vouchers

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

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

### Public Access to Information

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

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

### Display Locations for PHA Plans and Supporting Documents

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

- Main administrative office of the PHA
- PHA development management offices
- PHA local offices
- Main administrative office of the local government
- Main administrative office of the County government
- Main administrative office of the State government
- Public library
- PHA website
- Other (list below)

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

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

**5-YEAR PLAN**  
**PHA FISCAL YEARS 2005 - 2009**  
[24 CFR Part 903.5]

**A. Mission**

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

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

**The Housing Authority of the City of Fort Myers, a professional housing management governmental corporation, owns, manages, develops and administers federal state and local housing and social programs for low, very low and moderate income families while successfully implementing national housing policies incorporating family self-sufficiency as a main component for transitioning families from welfare to work. The Authority's focus is twofold. It will work with the community to administer successful Section 8 voucher and project-based assisted housing programs. It will also work to change the face of public housing by transforming the most severely distressed public housing in Fort Myers from sources of urban blight to engines of urban renewal creating paradigm shifts in public housing culture, values and behavior through establishing positive incentives for resident self-sufficiency, providing comprehensive services that empower residents, while lessening concentrations of poverty, promoting mixed-income communities and assuring equal access to safe quality housing for low, very low and moderate income families throughout the community.**

**B. Goals**

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD-suggested objectives or their own, **PHAS ARE STRONGLY ENCOURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS.** (Quantifiable measures would include targets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the spaces to the right of or below the stated objectives.

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

- PHA Goal: Expand the supply of assisted housing  
Objectives:
- Apply for additional rental vouchers:
  - Reduce public housing vacancies:

- Leverage private or other public funds to create additional housing opportunities:
- Acquire or build units or developments
- Other (list below) Increase Home Ownership Participation by five annually
  
- PHA Goal: Improve the quality of assisted housing
  - Objectives:
  - Improve public housing management: (PHAS score)
  - Improve voucher management: (SEMAP score)
  - Increase customer satisfaction:
  - Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections)
    - Develop a Vacancy Reduction Plan to report, track and provide funding for units damaged beyond normal repair and provide for cyclical painting
  - Renovate or modernize public housing units:
  - Demolish or dispose of obsolete public housing:
  - Provide replacement public housing:
  - Provide replacement vouchers:
  - Other: (list below)
  
- PHA Goal: Increase assisted housing choices
  - Objectives:
  - Provide voucher mobility counseling:
  - Conduct outreach efforts to potential voucher landlords
  - Increase voucher payment standards
  - Implement voucher homeownership program
  - Implement public housing or other homeownership programs:
  - Implement public housing site-based waiting lists:
  - Convert public housing to vouchers:
  - Other: (list below)
    - Expand Homeownership Program

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

- PHA Goal: Provide an improved living environment
  - Objectives:
  - Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
  - Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
  - Implement public housing security improvements:
  - Designate developments or buildings for particular resident groups (elderly, persons with disabilities)

- Other: (list below) Promote and Expand homeownership opportunities

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

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

Objectives:

- Increase the number and percentage of employed persons in assisted families:
- Provide or attract supportive services to improve assistance recipients' employability:
- Provide or attract supportive services to increase independence for the elderly or families with disabilities.
- Other: (list below)

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

- PHA Goal: Ensure equal opportunity and affirmatively further fair housing

Objectives:

- Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability:
- Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:
- Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
- Other: (list below)

**Other PHA Goals and Objectives: (list below)**

**PHA Strategic Goal: Offer Housing Counseling to Residents**

- HACFM Goal: Provide Housing Counseling to assist Public Housing and Section 8 residents to purchase and maintain homes and rentals.

Objectives:

- Become a HUD Certified Housing Counseling Agency.
- Offer Housing Counseling on site to Public Housing and Section 8 families to address pre and post purchase and rental.
- Provide or attract supportive services to increase the availability of housing counseling programs for interested families.
- Other: (list below)

**PHA Strategic Goal: Implement HOPE VI Plan to revitalize HACFM housing**

HACFM Goal: Implement Mixed Finance development plans for replacing aging obsolete public housing units.

Objectives:

Implement HOPE VI PHASE I plan with developer to build 120 units under Low Income Housing Tax Credit restrictions with 96 units under ACC Public Housing and 24 LIHTC only units

Finalize and implement permanent financing for PHASE I

Construct high quality buildings

Other: (list below)

- HOPE VI Relocation of Flossie Riley residents
- Include Replacement Housing Factor Funds in the project
- Continue planning next phases of HOPE VI plan, including:
  - Southward Village Community Center major renovation
  - New Administration Building

## **TOWARD ACHIEVING HACFM GOALS & OBJECTIVES:**

### **I. Increase the availability of decent, safe, and affordable housing.**

- Continue to implement the \$20 Million HUD HOPE VI grant to revitalize Public Housing that was awarded as follows:
  - Formalized contract with developer Norstar with Renaissance Preserve as co-developer
  - Devised a limited liability partnership
  - Relocated Michigan Court residents
  - Completed Demolition of Michigan Court
  - Determined that the site on which Phase I will be built on will be leased from HACFM to the partnership under a long-term ground lease
  - Formalized permanent financing for Phase I
- Continue developing additional public/private partnerships for HOPE VI project
- Continue to inspect Public Housing units to develop costs & extent of needed renovations
- Renovated Public Housing to upgrade flooring with carpeting and vinyl in Southward and Palmetto
- Undertook Asset Management reevaluation of all developments
- Began site based wait lists for Public Housing developments as part of Asset Management functions in conjunction with the HOPE VI plan
- Continue operating Horizons, purchased in Oct 2000 for fair market rental, providing 180 units.
- Maintained a High Occupancy Rate of Rental Units by:
  - Evaluating the success of using outside maintenance service contractors to supplement in-house efforts.
  - Continued active marketing of vacancies.
  - Revised Intake procedures to develop a Pre-App
  - Developed automated system for processing applications
  - Implemented flat rents
  - Developed a Vacancy Reduction Plan to earmark funding for repairs for units damaged beyond normal and cyclical painting
- Continue to administer the Section 8 program taken over from the City in late 2006 with 1533 vouchers and now the program has 1755 vouchers, a 15% increase
- Utilized the 300 relocation vouchers in connection with the HOPE VI Program for relocating residents of Michigan Court and Flossie Riley units.
- Became a HUD Certified Housing Counseling Agency in March, 2008

- Provided Housing Counseling to Public Housing and Sec 8 residents on pre and post purchase and rental
- Developed a network of supportive service agencies that also provide Housing Counseling to Public Housing and Sec 8 residents on site at HACFM

## **II. Improve community quality of life and economic vitality**

- Community Service: Continue providing residents information on the program as mandatory. Held meetings posted notices throughout HACFM developments notifying residents of HUD regulations. Provided for the Resident Initiatives Coordinator of FMHA to attend all Resident Council Meetings and interact with residents to provide follow up and explain service requirements. Maintain records of resident service.
- Neighborhood Appearance: As in 2006, the Housing Authority continued City Trash pick up, providing larger containers for trash in an effort to improve neighborhood appearance. Stepped up enforcement of lease violations having to do with littering; improved perimeter lighting; and painted Public Housing development exteriors to improve curb-appeal of properties.
- Safety: The HACFM continued to vigorously enforce evictions and stepped up lease violations to continue to ensure safety and security of residents.
- Quality of Life: Submitted and received HOPE VI grant. Also implemented Section 8 Homeownership Program. HACFM also became a Certified Housing Counseling Agency in 3/08.

## **III. Promote self-sufficiency and asset development of families and individuals**

- Awarded both HUD Public Housing and HCV Family Self Sufficiency grants in 2008
- HACFM approved as a HUD Certified Housing Counseling agency in March 2008.
- Continue to link residents to services provided by outside agencies through Elderly Service Coordinator and through Family ROSS grant program and Neighborhood Network Center programs
- Improved residents transportation needs by meeting with local transportation provider to tailor routes for Public Housing residents
- Continued to provide opportunities for adult and juvenile education and development towards self-sufficiency for families through:
  - A. ROSS Elderly Service Coordinator (2001, 2002, 2003 & 2004 & FY 2005 & 2006, 07 & 08)
  - B. ROSS Neighborhood Networks Grant – awarded two HUD NN Center grants – one in FY 2003 and

one in FY 2006 for \$300,000 for an additional 3 years of operation.

C. Awarded a Neighborhood Network Center Grant for Palmetto Court in 2008

D. ROSS Family Grant – awarded two HUD Ross Family Grants, one in FY 2004 and one for FY 2006 Family Homeownership Grant in the amount of \$250,000. Awarded HUD FY 2007 grant in the amount of \$250,000.

- Maintain successful HUD certified Public Housing FSS Program with 11 families enrolled currently
- Maintain successful HUD certified HCV FSS Program with 65 families enrolled currently
- Applied for and received FSS Coordinator Grants in 2005 and 2006 and 2007 and applied for Public Housing FSS Coordinator Grant in FY 2008
- Implemented Section 8 FSS Program that currently has 76 clients participating.
- Developed active FSS Task Force of Local Service Providers
- Continue to maintain information on file on local programs that promote resident self-sufficiency and linked these programs with residents
- Partnered with Boys & Girls Club to implement an after-school program at Palmetto Court Neighborhood Network Center.
- Partnered with Next Level Church to provide backpacks to youth and Thanksgiving groceries for families in Palmetto Court.

**Annual PHA Plan**  
**PHA Fiscal Year 2009**  
[24 CFR Part 903.7]

**i. Annual Plan Type:**

Select which type of Annual Plan the PHA will submit.

- Standard Plan**
- Troubled Agency Plan**

**ii. Executive Summary of the Annual PHA Plan**

[24 CFR Part 903.7 9 (r)]

Provide a brief overview of the information in the Annual Plan, including highlights of major initiatives and discretionary policies the PHA has included in the Annual Plan.

**The Housing Authority has developed its Annual and 5 yr Plans to address affordable housing needs for low income residents of the City of Fort Myers by operating safe, secure housing and providing programs that support and encourage economic self-sufficiency opportunities for residents. As part of its planning, the Housing Authority developed and reviewed a set of goals and objectives designed to provide a comprehensive approach to accomplishing its overall mission. One facet of the Plan provides for an on-going review of all HACFM operations to improve service delivery, achieve maximum fiscal prudence and maximize revenue from both conventional and non-conventional sources. Another facet of the plan provides for managing existing and future assets to ensure a trend of increasing positive cash flow for the Housing Authority, which is significant in relation to HUD's reductions of Capital and Operating funding.**

**Since FY 2005, the HACFM has maintained the HUD "Elderly Only Designation" for three of its developments, Bonair Towers, Royal Palm Tower, and Flossie M. Riley Garden Apartments, granted in 2004. Relocation vouchers are being issued to residents of Flossie M. Riley Garden Apartments in connection with the HOPE VI project to revitalize PUBLIC HOUSING units.**

**The HACFM continues to follow all HUD mandates concerning involuntary resident participation in the Community Service Program. Residents are notified in meetings, by mail and by notices posted throughout the HOUSING AUTHORITY. Staff reports eligible residents service hours and maintains a listing of community activities for resident participation.**

**The HOPE VI grant in the amount of \$20 million awarded to the HACFM in October, 2005 involves public / private partnerships that reach out to all segments of the community. During 2006 and 2007, the HACFM addressed resident relocation, submitted the Community Supportive Services segment, and formalized a contract with new developers to implement all facets of the HOPE VI Project. During 2007 & 2008, Sec 8 vouchers were used to help relocate many residents in Michigan Court Demolition was ongoing during 2008 on Michigan Court and administrative service offices were**

repositioned. Permanent Financing for Phase I has been secured, and a Limited Liability Partnership formed as the ownership entity.

In conjunction with Asset Management initiatives, the Public Housing waiting lists are now site based effective July, 2007. During 2008, waiting lists for each of the developments increased significantly. Palmetto Court increased 77% from 59 to 253; and Southward Village increased 54% from 118 to 257.

The HACFM's certified Public Housing Family Self Sufficiency Program is highly successful. Currently 11 PUBLIC HOUSING families are participating along with an active task force of local service partners. The HACFM applied for HUD ROSS (Resident Opportunity for Self Sufficiency) FSS Grants in 2005 & 2006 & 2007 and 2008 to fund the Program Director's salary. 2005 & 2006 & 2007 Grants were awarded and 2008 is pending. The HACFM was awarded a three year 2004 HUD ROSS Family grant to assist in funding the Family Self-Sufficiency program activities. A 2006 HUD ROSS application for an additional 3 year award in the amount of \$250,000 was awarded during 2007, and a 2007 grant for \$250,000 was awarded for an additional 3 years.

The HACFM developed a Housing Counseling Program in early 2008 and applied for and received HUD Certification. Staff has attended training for individual development and certification. HACFM applied for a 2008 Housing Counseling grant in the amount of \$76,876 to staff the counseling program.

The HACFM received a Neighborhood Network Center grant for Michigan Court to offer computer technology to residents and improve their path to self-sufficiency. The Center was serving approximately 1,000 residents per month during 2005, 2006 & 2007. The HACFM applied for and received a new FY 2006 Neighborhood Network Center Grant in the amount of \$300,000 for the new location in the Community Supportive Services (CSS) building in connection with the HOPE VI project. The HACFM also applied for and received a Neighborhood Network Center Grant for Palmetto Court in the amount of \$150,000.

Since late 2006, the HACFM assumed implementation of the HUD Section 8 Voucher program. The program went up almost 15% from 1533 vouchers to 1755 in 2007 and 2008. In addition, 300 Sec 8 relocation vouchers were utilized in conjunction with the HOPE VI project. Currently there are 24 Portable Vouchers we are administering and 3 Homeownership Vouchers. The recent SEMAP score gave "High Performer Status" to HACFM. The department is currently running a 100% lease up. It is also assisting property owners who lose their homes due to landlord foreclosure, thus forcing Section 8 families to look for rental housing elsewhere. The 2008 Sec 8 waiting list has 2253 families, a 70% increase over the 698 in 2007. The waiting list has been closed since January 11, 2008. Staff training, a Landlord Outreach Program and Program Auditing are HACFM priorities along with working with families regarding foreclosures. The department runs a successful HCV FSS Program. There are currently 65 voucher participants in the Section 8 FSS program.

From 2003 through 2006, the Average Unadjusted Income for HACFM's 3 family Public Housing developments rose from \$8668 in 2003 to \$8753 in 2004 to \$9538 in 2005 to \$10,811 in 2006. In 2007, with 2 family developments, Southward Village & Palmetto only, the Average Unadjusted Income was \$11,260. The average unadjusted income for

these two HACFM Public Housing family developments for 2008 is \$10,810, down from 2007's \$11,260 and nearly equal to 2006's \$10,811. The average unadjusted income for Southward compares at 99% and Palmetto compares at 102%, making both these family developments are well within the HUD guidelines for Income Deconcentration.

During 2008, the percentage of extremely low-income families on the Public Housing family site based waiting lists increased to 90% in Southward Village and to 92% in Palmetto Ct, reversing the trend from 2006 and 2007 where it dropped slightly from 89% in 2006 to 84%. The number of families with children on the PUBLIC HOUSING wait lists dropped from a high of 83% in 2006 to 70% in 2007 to 69% at Palmetto Ct and 60% at Southward Village, still higher than the 58% it was on the 2005 waiting list.

In the coming year, the HACFM will continue to work with the community to implement the HOPE VI project. HACFM and the developer will move forward to complete the revitalization of Michigan Court. Flossie M. Riley residents will be relocated. Construction of the New Administration Building and major renovation of the Southward Village Community Center (the Carrie Robinson Center) will begin. HACFM will assist residents with its newly Certified Housing Counseling Program and will deal with landlord foreclosures that force tenants to move out in the Section 8 voucher program. Additionally HACFM will ensure on-going tenant file auditing, and will continue focusing on increasing resident involvement, providing safety and security, and improving neighborhood appearance. Operationally, HACFM will provide elevator modernization and a new fire sprinkler system at Royal Palm Towers. HACFM will continue as well to review all operations and establish viable options in an effort to manage existing and future assets with an overall goal of self-sufficiency.

**iii. Annual Plan Table of Contents**

[24 CFR Part 903.7 9 (r)]

Provide a table of contents for the Annual Plan, including attachments, and a list of supporting documents available for public inspection.

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### Attachments

Indicate which attachments are provided by selecting all that apply. Provide the attachment's name (A, B, etc.) in the space to the left of the name of the attachment. Note: If the attachment is provided as a **SEPARATE** file submission from the PHA Plans file, provide the file name in parentheses in the space to the right of the title.

#### Required Attachments:

- Admissions Policy for Deconcentration – Included under Section 3
- FY 2009 Capital Fund Program Annual Statement – fl047a01
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)
- List of Resident Advisory Board Members – Included under Section 18
- List of Resident Board Member – Included under Section 18
- Community Service Description of Implementation - Included in Section 12
- Information on Pet Policy – Included under Section 14
- Section 8 Homeownership Capacity Statement, if applicable – Included in Section 11
- Description of Homeownership Programs, if applicable – Included in Section 11

#### Optional Attachments:

- PHA Management Organizational Chart
- FY 2009 Capital Fund Program 5 Year Action Plan – Attachment fl047a01

- Public Housing Drug Elimination Program (PHDEP) Plan
- Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text) (Note: **Included under Section 18 A**)
- Other (List below, providing each attachment name)  
Project-Based Voucher Program – Included in Section 11

**Supporting Documents Available for Review**

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

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans
X	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	Schedule of flat rents offered at each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
X	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
X	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
X	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
X	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
X	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
X	Policies governing any Section 8 Homeownership program <input checked="" type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
	The most recent Public Housing Drug Elimination Program	Annual Plan: Safety and

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	(PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U. S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)
X	Resident Advisory Board Comments on FY 2009 An Plan	Annual Plan Sec 18 A

## **1. Statement of Housing Needs**

[24 CFR Part 903.7 9 (a)]

### **A. Housing Needs of Families in the Jurisdiction/s Served by the PHA**

Based upon the information contained in the Consolidated Plan/s applicable to the jurisdiction, and/or other data available to the PHA, provide a statement of the housing needs in the jurisdiction by completing the following table. In the "Overall" Needs column, provide the estimated number of renter families that have housing needs. For the remaining characteristics, rate the impact of that factor on the housing needs for each family type, from 1 to 5, with 1 being "no impact" and 5 being "severe impact." Use N/A to indicate that no information is available upon which the PHA can make this assessment.

<b>Housing Needs of Families in the Jurisdiction by Family Type – City of Fort Myers, Florida</b>							
Family Type	Overall	Afford-ability	Supply	Quality	Accessibility	Size	Location
Income <= 30% of AMI	2098	5	5	N/A	N/A	N/A	N/A
Income >30% but <=50% of AMI	1506	5	5	N/A	N/A	N/A	N/A
Income >50% but <80% of AMI	1459	4	4	N/A	N/A	N/A	N/A
Elderly	665	5	5	N/A	N/A	N/A	N/A
Families with Disabilities	585			N/A	N/A	N/A	N/A
Race/Ethnicity White/Non Hispanic	2772	5	5	N/A	N/A	N/A	N/A
Race/Ethnicity Black/Non Hispanic	1844	5	5	N/A	N/A	N/A	N/A
Race/Ethnicity Hispanic	955	5	5	N/A	N/A	N/A	N/A

Housing Needs of Families in the Jurisdiction by Family Type – City of Fort Myers, Florida							
Family Type	Overall	Afford- -ability	Supply	Quality	Accessibility	Size	Location
Race/Ethnicity							

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction/s  
Indicate year:
- U.S. Census data: the Comprehensive Housing Affordability Strategy (“CHAS”) dataset
- American Housing Survey data  
Indicate year:
- Other housing market study  
Indicate year:
- Other sources: (list and indicate year of information)

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

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

Housing Needs of Families on the Waiting List			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input checked="" type="checkbox"/> <b>Public Housing Site-Based</b> or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction: <b>PALMETTO COURT</b>			
<b>Palmetto Court</b>	# of families	% of total families	Annual Turnover
Waiting list total	253		247
Extremely low income <=30% AMI	230	91%	
Very low income (>30% but <=50% AMI)	22	8.6%	
Low income (>50% but <80% AMI)	1	0.4%	

Housing Needs of Families on the Waiting List			
Families with children	174	69%	
Elderly families	6	2%	
Families with Disabilities	3	9%	
<u>Race/ethnicity</u> White	68	27%	
<u>Race/ethnicity</u> Black	184	73%	
<u>Race/ethnicity</u> Amer. Indian	1	0.4%	
<u>Race/ethnicity</u> Hispanic	30	12%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	66	26%	
2 BR	91	36%	
3 BR	79	31%	
4 BR	15	6%	
5 BR	2	1%	
5+ BR			
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes: How long has it been closed (# of months)? Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Waiting list type: (select one) <input type="checkbox"/> Section 8 tenant-based assistance <input type="checkbox"/> Public Housing <input type="checkbox"/> Combined Section 8 and Public Housing <input checked="" type="checkbox"/> <b>Public Housing Site-Based</b> or sub-jurisdictional waiting list (optional) If used, identify which development/subjurisdiction: <b>SOUTHWARD VILLAGE</b>			

<b>Housing Needs of Families on the Waiting List</b>			
<b>Southward Village</b>	<b># of families</b>	<b>% of total families</b>	<b>Annual Turnover</b>
Waiting list total	257		35
Extremely low income <=30% AMI	229	89.93%	
Very low income (>30% but <=50% AMI)	26	10%	
Low income (>50% but <80% AMI)	2	0.07%	
Families with children	155	60%	
Elderly families	7	2.7%	
Families with Disabilities	15	6%	
<u>Race/ethnicity</u> White	54	21%	
<u>Race/ethnicity</u> Black	200	78%	
<u>Race/ethnicity</u> American Indian/ Alaska Native	2	0.6%	
<u>Race/ethnicity</u> Asian/Pac Islander	1	0.4%	
<u>Race/ethnicity</u> Hispanic	34	13%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	96	37%	
2 BR	111	43%	
3 BR	36	14%	
4 BR	11	4%	
5 BR	3	1%	
5+ BR			

<b>Housing Needs of Families on the Waiting List</b>	
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	
If yes:	
How long has it been closed (# of months)?	
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes	
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes	

<b>Housing Needs of Families on the Waiting List</b>			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input checked="" type="checkbox"/> <b>Public Housing Site-Based</b> or sub-jurisdictional waiting list (optional)			
If used, identify which development/sub jurisdiction: <b>ROYAL PALM (ELDERLY)</b>			
<b>Royal Palm</b>	# of families	% of total families	Annual Turnover
Waiting list total	46		18
Extremely low income <=30% AMI	35	76%	
Very low income (>30% but <=50% AMI)	8	17%	
Low income (>50% but <80% AMI)	3	7%	
Families with children	2	4%	
Elderly families	27	59%	
Families with Disabilities	10	22%	
<u>Race/ethnicity</u> White	0	20%	
<u>Race/ethnicity</u> Black	37	80%	
<u>Race/ethnicity</u> American Indian/ Alaska Native	0	0%	
<u>Race/ethnicity</u> Hispanic	8	17%	

Housing Needs of Families on the Waiting List			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	46	100%	
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes: How long has it been closed (# of months)? Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Housing Needs of Families on the Waiting List			
Waiting list type: (select one) <input type="checkbox"/> Section 8 tenant-based assistance <input type="checkbox"/> Public Housing <input type="checkbox"/> Combined Section 8 and Public Housing <input checked="" type="checkbox"/> <b>Public Housing Site-Based</b> or sub-jurisdictional waiting list (optional) If used, identify which development/subjurisdiction: <b>BONAIR TOWERS (ELDERLY)</b>			
Bonair Towers	# of families	% of total families	Annual Turnover
Waiting list total	19		34
Extremely low income <=30% AMI	13	68.42%	
Very low income (>30% but <=50% AMI)	5	26.32%	
Low income (>50% but <80% AMI)	1	5.21%	
Families with children	0	0%	

<b>Housing Needs of Families on the Waiting List</b>			
Elderly families	17	89%	
Families with Disabilities	2	11%	
Race/ethnicity White	14	74%	
Race/ethnicity Black	5	26%	
Race/ethnicity American Indian/ Alaska Native	0	0%	
Race/ethnicity - Hispanic	4	21%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	12	63%	
2 BR	7	37%	
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)?			
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

<b>Housing Needs of Families on the Waiting List</b>			
Waiting list type: (select one)			
<input checked="" type="checkbox"/> <b>Section 8 tenant-based assistance</b>			
<input type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
<b>Section 8 Tenant Based</b>	# of families	% of total families	Annual Turnover
Waiting list total	2253		0

<b>Housing Needs of Families on the Waiting List</b>			
Extremely low income <=30% AMI	1218	54%	
Very low income (>30% but <=50% AMI)	890	40%	
Low income (>50% but <80% AMI)	145	67%	
Families with children	1777	79%	
Elderly families	240	11%	
Families with Disabilities	236	10%	
<u>Race/ethnicity</u> (white)	1127	50%	
<u>Race/ethnicity</u> (Black)	1096	49%	
<u>Race/ethnicity</u> (Other)	30	1%	
<u>Race/ethnicity</u> (Hispanic)	576	26%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes If yes: How long has it been closed (# of months)? Since Jan 11, 2008 Does the PHA expect to reopen the list in the PHA Plan year? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes – Victims of Hate Reprisals or Victims of Disaster area as a result of Hurricanes or fire.			

**C. Strategy for Addressing 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**, and the Agency's reasons for choosing this strategy.

**(1) Strategies**

**Need: Shortage of affordable housing for all eligible populations**

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

Select all that apply

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

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select all that apply

- Employ admissions preferences aimed at families who are working
- Adopt rent policies to support and encourage work
- Other: (list below)

**Need: Specific Family Types: The Elderly**

**Strategy 1: Target available assistance to the elderly:**

Select all that apply

- Seek designation of public housing for the elderly
- Apply for special-purpose vouchers targeted to the elderly, should they become available
- Other: (list below)

**Need: Specific Family Types: Families with Disabilities**

**Strategy 1: Target available assistance to Families with Disabilities:**

Select all that apply

- Seek designation of public housing for families with disabilities
- Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing
- Apply for special-purpose vouchers targeted to families with disabilities, should they become available
- Affirmatively market to local non-profit agencies that assist families with disabilities
- Other: (list below)

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

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

Select if applicable

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

**Strategy 2: Conduct activities to affirmatively further fair housing**

Select all that apply

- Counsel section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units
- Market the section 8 program to owners outside of areas of poverty /minority concentrations
- Other: (list below)
- The Housing Authority actively cooperates with the City of Fort Myers in efforts to remove impediments to fair housing choice.
  - Promote Fair Housing through seminars, training, posters and pamphlets

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

**Need: Relocate residents living in Public Housing Flossie M. Riley and Michigan Court affected in the HOPE VI revitalization Plan.**

**Strategy 1:** Utilize 300 Sec 8 relocation vouchers for resident relocation in connection with the HOPE VI revitalization plan.

**(2) Reasons for Selecting Strategies**

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

- Funding constraints
- Staffing constraints
- Limited availability of sites for assisted housing
- Extent to which particular housing needs are met by other organizations in the community
- Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
- Influence of the housing market on PHA programs
- Community priorities regarding housing assistance
- Results of consultation with local or state government
- Results of consultation with residents and the Resident Advisory Board
- Results of consultation with advocacy groups

Other: (list below) Considerations connected with the HACFM HUD approved HOPE VI Plan being implemented.

## **2. Statement of Financial Resources**

[24 CFR Part 903.7 9 (b)]

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

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2007 grants)</b>		
a) Public Housing Operating Fund	2,400,000	
b) Public Housing Capital Fund	915,000	
c) HOPE VI Revitalization	3,600,000	
d) HOPE VI Demolition	440,000	
e) Annual Contributions for Section 8 Tenant-Based Assistance	10,600,000	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants	355,000	
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
CFP FFY 2008	1,753,678	
CFPFY 2007	1,300,000	
<b>3. Public Housing Dwelling Rental Income</b>	1,115,000	

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
4. Other income (list below)		
4. Non-federal sources (list below)		
<b>Total resources</b>	<b>22,478,678</b>	

### **3. PHA Policies Governing Eligibility, Selection, and Admissions**

[24 CFR Part 903.7 9 (c)]

#### **A. Public Housing**

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

##### **(1) Eligibility**

a. When does the PHA verify eligibility for admission to public housing? (select all that apply)

- When families are within a certain number of being offered a unit: (state number)
- When families are within a certain time of being offered a unit: (state time)
- Other: (describe) **At the time of application**

b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?

- Criminal or Drug-related activity
- Rental history
- Housekeeping
- Other (describe)

c.  Yes  No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

d.  Yes  No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

e.  Yes  No: Does the PHA access FBI criminal records from the FBI for screening purposes? (Either directly or through an NCIC-authorized source)

**(2)Waiting List Organization**

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

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

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

- PHA main administrative office
- PHA development site management office
- Other (list below)

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

1. How many site-based waiting lists will the PHA operate in the coming year?4

2.  Yes  No: Are any or all of the PHA’s site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD-approved site based waiting list plan)?

If yes, how many lists? **4**

**The lists were implemented as part of the HACFM Asset Management program in conjunction with the HOPE VI project.**

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

4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?

- PHA main administrative office
- All PHA development management offices
- Management offices at developments with site-based waiting lists
- At the development to which they would like to apply
- Other (list below)

**Assessment of Site-Based Waiting List Development  
Demographic Characteristics**

<b>Development Information: (Name, Number, Location)</b>	<b>Date Initiated</b>	<b>Initial Mix of Racial, Ethnic or Disability Demographics</b>	<b>Current Mix of Ethnic or Disability Demographics since Initiation of SBWL (2008)</b>	<b>Percent change between Initial and current mix of Racial, Ethnic or Disability Demographics</b>
Southward Village FL 047-001	07/01/2007	14% White 86% Black  11% Hispanic 89% non-Hispanic	21% White 78% Black 1% Amer Indian 13% Hispanic 87% Non Hispanic	+7% -8% +1% +2% -2%
Bonair Towers FL047-002	04/01/2007	79% White 19% Black 2% American Indian / Alaska Native 47% Hispanic 53% non-Hispanic	74% White 26% Black 0 American Indian/ Alaska Native 21% Hispanic 79% non-Hispanic	-5% +7% -2% -26% +26%
Palmetto Court FL047-003	07/01/2007	16% White 84% Black 15% Hispanic 85% non-Hispanic	27% White 73% Black 12% Hispanic 88% non-Hispanic	+11% -11% -3% +3% %
Royal Palm Towers FL047-004	04/01/2007	88% White 8% Black 4% American Indian/Alaska Native 41% Hispanic 59% non-Hispanic	80% White 20% Black 0 American Indian/ Alaska Native 17% Hispanic 83% non-Hispanic	-8% +12% -4% -24% +24%

**(3) Assignment**

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

---

- One
- Two
- Three or More

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

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

**(4) Admissions Preferences**

a. Income targeting:

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

b. Transfer policies:

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

- Emergencies
- Over-housed
- Under-housed
- Medical justification
- Administrative reasons determined by the PHA (e.g., to permit modernization work)
- Resident choice: (state circumstances below)
- Other: (list below) **The HACFM has a policy on transfers**

c. Preferences

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

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

Former Federal preferences:

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

Other preferences: (select below)

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

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

1 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

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

4. Relationship of preferences to income targeting requirements:

- The PHA applies preferences within income tiers

- Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

**(5) Occupancy**

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

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

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

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

**(6) Deconcentration and Income Mixing**

Yes  No: Does the PHA have any general occupancy (family) public housing developments covered by the deconcentration rule? If no, this section is complete. If yes, continue to the next question.

Yes  No: Do any of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments? If no, this section is complete. If yes, list these developments on the following table:

Development Name:	Number of Units	Explanation (if any) (See Step 4 at '903.2 (c) (1) (iv))	Deconcentration Policy (if no explanation) (see Step 5 at '903.2 (c) (1) (v))
None apply			

a.  Yes  No: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?

b.  Yes  No: Did the PHA adopt any changes to its **admissions policies** based on the results of the required analysis of the need to promote deconcentration of poverty or to assure income mixing?

c. If the answer to b was yes, what changes were adopted? (select all that apply)

Adoption of site-based waiting lists  
If selected, list targeted developments below:

Employing waiting list “skipping” to achieve deconcentration of poverty or income mixing goals at targeted developments  
If selected, list targeted developments below:

Employing new admission preferences at targeted developments  
If selected, list targeted developments below:

Other (list policies and developments targeted below)

d.  Yes  No: Did the PHA adopt any changes to **other** policies based on the results of the required analysis of the need for deconcentration of poverty and income mixing?

e. If the answer to d was yes, how would you describe these changes? (Select all that apply)

- Additional affirmative marketing
- Actions to improve the marketability of certain developments
- Adoption or adjustment of ceiling rents for certain developments
- Adoption of rent incentives to encourage deconcentration of poverty and income-mixing
- Other (list below)

f. Based on the results of the required analysis, in which developments will the PHA make special efforts to attract or retain higher-income families? (Select all that apply)

- Not applicable: results of analysis did not indicate a need for such efforts
- List (any applicable) developments below:

g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower-income families? (select all that apply)

- Not applicable: results of analysis did not indicate a need for such efforts
- List (any applicable) developments below:

## DECONCENTRATION OF POVERTY AND INCOME-MIXING

The HACFM has site based waiting list for all public housing developments except for Flossie M. Riley Garden Apartments designated for the elderly which is slated for demolition and the waiting list has been discontinued.

Gross annual income is used for income limits at admission and for income-mixing purposes.

Skipping of a family on the waiting list specifically to reach another family with a lower or higher income is not to be considered an adverse action to the family. Skipping can be applied within developments until the target threshold is met.

The PHA uses gathered tenant income information in its assessment of public housing developments to determine the appropriate designation to be assigned to the project for the purpose of assisting the HACFM in its deconcentration goals.

## **Deconcentration and Income-Mixing Goals**

**Admission policies related to the deconcentration efforts of the HACFM do not impose specific quotas. Therefore, the HACFM will not set specific quotas, but will strive to achieve deconcentration and income-mixing in its developments through evaluation of income per development and skipping of a family on a waiting list if necessary to reach another family with a higher or lower income in its site based lists.**

### **Project Designation Methodology**

**The HACFM determines and compares tenant incomes at all of its family PUBLIC HOUSING developments. On analyzing its findings, the HACFM will apply the policies, measures and incentives listed herein to bring higher income families into lower income developments and lower income families into higher income developments.**

**Our goal is to have eligible families with higher incomes occupy dwelling units in projects occupied predominantly by eligible families having lower incomes, and eligible families with lower incomes occupy dwelling units in projects predominantly occupied by eligible families having higher incomes. The waiting list statistics indicate there is sufficient extremely low income and very low income persons to balance incomes in developments designated higher income developments.**

**The HACFM uses the “Aggregate Average Method” to achieve its deconcentration objectives. Resident income is reviewed annually. Using the incomes of all families in all developments as a baseline, the HACFM then determines the average income of all of its resident families, by development. This information is kept on file in the HACFM. The HACFM will designate higher income developments those with average income above the aggregate average, and will designate lower income developments those with average income below the aggregate average.**

The Housing Authority of the City of Fort Myers has currently 2 PUBLIC HOUSING family developments, namely Southward Village and Palmetto Court.

**The average unadjusted income for these two HACFM Public Housing family developments is \$10,810, down from 2007’s \$11,260 and nearly equal to 2006’s**

**\$10,811. The average unadjusted income for Southward compares at 99% and Palmetto compares at 102%, making both these family developments well within the HUD guidelines.**

# UNITS	DEV.	PERCENT	AVERAGE INCOME
199	Southward	99%	\$10,692
99	Palmetto	102%	\$11,049
298	Total Avg. Unadjusted Income	\$10,810	

### **B. Section 8**

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

#### **(1) Eligibility**

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

e. Indicate what kinds of information you share with prospective landlords? (Select all that apply)

- Criminal or drug-related activity  
 Other (describe below) **Information from a tenant file will be released to a prospective landlord upon receipt of a written request from the landlord.**

**(2) Waiting List Organization**

a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (Select all that apply)

- None  
 Federal public housing  
 Federal moderate rehabilitation  
 Federal project-based certificate program  
 Other federal or local program (list below)

b. Where may interested persons apply for admission to Section 8 tenant-based assistance? (Select all that apply)

- PHA main administrative office  
 Other (list below)

**(3) Search Time**

a.  Yes  No: Does the PHA give extensions on standard 60-day period to search for a unit?

If yes, state circumstances below: **Families that submit a “Written Request for Extension” prior to their first 60 day expiration will be granted.**

**(4) Admissions Preferences**

a. Income targeting

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

b. Preferences

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

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

Former Federal preferences

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in your jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below) – Victims of Federally declared disaster areas
- Other preference(s) (list below) – {30% of AMI

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

1      Date and Time

Former Federal preferences

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

Other preferences (select all that apply)

- 4 Working families and those unable to work because of age or disability
- Veterans and veterans' families

- Residents who live and/or work in your jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- 3 Victims of reprisals or hate crimes
- 1 Other preference(s) (list below) – Victims of Federally declared disaster areas
- 2 Other preference(s) (list below) – {30% of AMI

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

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

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

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

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

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

#### **(5) Special Purpose Section 8 Assistance Programs**

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

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

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

- Through published notices
- Other (list below)  
**Community Based Media**

#### **4. PHA Rent Determination Policies**

[24 CFR Part 903.7 9 (d)]

## A. Public Housing

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

### (1) Income Based Rent Policies

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

a. Use of discretionary policies: (select one)

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

---or---

- The PHA employs discretionary policies for determining income based rent (If selected, continue to question b.)

b. Minimum Rent

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

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

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

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

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

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

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

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

- For the earned income of a previously unemployed household member
- For increases in earned income
- Fixed amount (other than general rent-setting policy)  
If yes, state amount/s and circumstances below:
  
- Fixed percentage (other than general rent-setting policy)  
If yes, state percentage/s and circumstances below:
  
- For household heads
- For other family members
- For transportation expenses
- For the non-reimbursed medical expenses of non-disabled or non-elderly families
- Other (describe below)

e. Ceiling rents

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

- Yes for all developments
- Yes but only for some developments
- No

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

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

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

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

Other (list below)

f. Rent re-determinations:

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

- Never
- At family option
- Any time the family experiences an income increase
- Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold) \_\_\_\_\_
- Other (list below)

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

## **(2) Flat Rents**

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

- The section 8 rent reasonableness study of comparable housing
- Survey of rents listed in local newspaper
- Survey of similar unassisted units in the neighborhood
- Other (list/describe below)

## **B. Section 8 Tenant-Based Assistance**

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

### **(1) Payment Standards**

Describe the voucher payment standards and policies.

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

- At or above 90% but below 100% of FMR
- 100% of FMR
- Above 100% but at or below 110% of FMR
- Above 110% of FMR (if HUD approved; describe circumstances below)

b. If the payment standard is lower than FMR, why has the PHA selected this standard? (Select all that apply)

- FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area
- The PHA has chosen to serve additional families by lowering the payment standard
- Reflects market or submarket
- Other (list below)

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

- FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area
- Reflects market or submarket
- To increase housing options for families
- Other (list below)

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

- Annually (last review August 27, 2008)
- Other (list below)

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

- Success rates of assisted families
- Rent burdens of assisted families
- Other (list below)

## **(2) Minimum Rent**

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

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

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

## **5. Operations and Management**

[24 CFR Part 903.7 9 (e)]

Exemptions from Component 5: High performing and small PHAs are not required to complete this section. Section 8 only PHAs must complete parts A, B, and C(2)

**A. PHA Management Structure**

Describe the PHA’s management structure and organization.

(Select one)

- An organization chart showing the PHA’s management structure and organization is attached.
- A brief description of the management structure and organization of the PHA follows:  
**The HACFM is governed by a 7 member board appointed by the Mayor of the City of Fort Myers. The Board hires a full-time executive director who manages the Authority’s day to day operations with a qualified staff.**

**B. HUD Programs under PHA Management**

List Federal programs administered by the PHA, number of families served at the beginning of the upcoming fiscal year, and expected turnover in each. (Use “NA” to indicate that the PHA does not operate any of the programs listed below.)

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	616	50 - 100
Section 8 Vouchers	1755	350
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers (list individually)	300 relocation vouchers	300
Public Housing Drug Elimination Program (PHDEP)		
Other Federal Programs(list individually)		
FSS Program PUBLIC HOUSING	11 Families	5-8 families
FSS Program Sec 8	65 Families	5-8 families
Capital Fund Program	557 Units	50 – 100 Units
Ross Elderly Service Coordinator Program	289 Units	90 Units
ROSS Neighborhood Network Ctr Program	300-350 Unduplicated families	300-400

ROSS Family Program	75 families	3-40
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### C. Management and Maintenance Policies

List the PHA's public housing management and maintenance policy documents, manuals and handbooks that contain the Agency's rules, standards, and policies that govern maintenance and management of public housing, including a description of any measures necessary for the prevention or eradication of pest infestation (which includes cockroach infestation) and the policies governing Section 8 management.

(1) Public Housing Maintenance and Management: (list below)

**HACFM Admissions and Occupancy Policy Manual**  
**Housing Counseling Program**  
**PUBLIC HOUSING FSS Program**  
**HACFM Maintenance Policy**  
**Utility Study**

(2) Section 8 Management: (list below)

**HACFM Section 8 Administrative Plan**  
**Landlord Outreach Program**  
**Housing Counseling Program**  
**HCV FSS Program**

## 6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

Exemptions from component 6: High performing PHAs are not required to complete component 6. Section 8-Only PHAs are exempt from sub-component 6A.

### A. Public Housing

1.  Yes  No: Has the PHA established any written grievance procedures in addition to federal requirements found at 24 CFR Part 966, Subpart B, for residents of public housing?

If yes, list additions to federal requirements below:

2. Which PHA office should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)

- PHA main administrative office  
 PHA development management offices  
 Other (list below)

### B. Section 8 Tenant-Based Assistance

1.  Yes  No: Has the PHA established informal review procedures for applicants to the Section 8 tenant-based assistance program and informal hearing procedures for families assisted by the Section 8 tenant-based assistance program in addition to federal requirements found at 24 CFR 982?

If yes, list additions to federal requirements below:

2. Which PHA office should applicants or assisted families contact to initiate the informal review and informal hearing processes? (Select all that apply)
- PHA main administrative office  
 Other (list below)

## **7. Capital Improvement Needs**

[24 CFR Part 903.7 9 (g)]

Exemptions from Component 7: Section 8 only PHAs are not required to complete this component and may skip to Component 8.

### **A. Capital Fund Activities**

Exemptions from sub-component 7A: PHAs that will not participate in the Capital Fund Program may skip to component 7B. All other PHAs must complete 7A as instructed.

#### **(1) Capital Fund Program Annual Statement**

Using parts I, II, and III of the Annual Statement for the Capital Fund Program (CFP), identify capital activities the PHA is proposing for the upcoming year to ensure long-term physical and social viability of its public housing developments. This statement can be completed by using the CFP Annual Statement tables provided in the table library at the end of the PHA Plan template **OR**, at the PHA's option, by completing and attaching a properly updated HUD-52837.

Select one:

- The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name) fl047a01

-or-

- The Capital Fund Program Annual Statement is provided below: (if selected, copy the CFP Annual Statement from the Table Library and insert here)

#### **(2) Optional 5-Year Action Plan**

Agencies are encouraged to include a 5-Year Action Plan covering capital work items. This statement can be completed by using the 5 Year Action Plan table provided in the table library at the end of the PHA Plan template **OR** by completing and attaching a properly updated HUD-52834.

- a.  Yes  No: Is the PHA providing an optional 5-Year Action Plan for the Capital Fund? (if no, skip to sub-component 7B)

b. If yes to question a, select one:

The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state name)fl047a01

-or-

The Capital Fund Program 5-Year Action Plan is provided below: (if selected, copy the CFP optional 5 Year Action Plan from the Table Library and insert here)

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

Applicability of sub-component 7B: All PHAs administering public housing. Identify any approved HOPE VI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

Yes  No: a) Has the PHA received a HOPE VI revitalization grant? (if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary)  
b) Status of HOPE VI revitalization grant (complete one set of questions for each grant)

1. Development name: **Michigan Court / Flossie M. Riley Garden Apts.**

2. Development (project) number: **FL 047 -006**

3. Status of grant: (select the statement that best describes the current status)

- Revitalization Plan under development
- Revitalization Plan submitted, pending approval
- Revitalization Plan approved
- Activities pursuant to an approved Revitalization Plan underway

Yes  No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?  
If yes, list development name/s below:

Yes  No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?  
If yes, list developments or activities below:  
**New construction as part of HOPE VI Phase I for Michigan Court and Flossie M. Riley Garden Apartments; and from affordable housing rental tax credit for all public housing**

developments. Regarding Mixed-Financed Deal under HOPE VI for 2008-2009, here follows a brief description of Phase 1:

1. The Housing Authority of the City of Fort Myers' plan is to complete the Michigan Courts revitalization in five phases that will be a mixed finance project that will replace the aging obsolete public housing units. The rental units comprising the first four phases will be constructed on the site of the demolished Michigan Courts, with the homeownership units in the final phase to be constructed on a donated off-site parcel. Phase I will consist of a 120 units, all of which will be under Low Income Housing Tax Credit (LIHTC) restrictions and with all 96 units under ACC Public Housing and 24 LIHTC only units.

The Developer for the project is Norstar Development USA, L.P, with Renaissance Preserve Developers, LLC, as Co-developer. The ownership entity for Phase I will be a limited liability partnership, Renaissance Preserve I, LLLP, consisting of two General Partners, Norstar Renaissance Preserve Senior, Inc. as Managing General Partner and Renaissance Preserve I, LLC (an affiliate of HACFM); an Investor Limited Partner, Apollo Housing Capital, LLC, and a Special Limited Partner, Apollo Housing Manager II, Inc. The site upon which Phase I will be built on will be leased from HACFM to the Partnership under a long-term ground lease.

Permanent financing for Phase I, including \$1,919,139 in Part "B" costs, will come from \$5,539,603 in HOPE VI funds (of which \$3,720,464 will be loaned to the partnership), a tax credit allocation from Florida Housing Finance Corporation (FHFC) generating \$ 7,824,271 in 4% tax credit equity, and a \$6.150 million loan from the FHFC's State Apartment Incentive Loan (SAIL) program and \$1,020,000 in ELI Supplement Funding from FHFC. Construction period financing, including the "B" costs, will come from \$10,000,000 in tax-exempt bond financing (which will be outstanding during the construction period), \$6.150 million in the SAIL Loan funds, \$5,539,603 in HOPE VI funds (of which \$3,720,464 will be used to collateralize the tax-exempt bonds), \$2,316,778 in tax credit equity and \$1,020,000 in ELI Supplement Funding.

All buildings constructed will be of high-quality block construction. The buildings in the family phases will consist of a mix of townhouse and multi-family walk-up style buildings. All units in Phase I will contain one or one-and-one half baths.

2. HOPE VI Relocation of Flossie Riley residents
3. Replacement Housing Factor Funds will be available for inclusion into the plan.

Yes  No: e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?

If yes, list developments or activities below:

**Royal Palm Towers**

## **8. Demolition and Disposition**

[24 CFR Part 903.7 9 (h)]

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

1.  Yes  No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 of the U.S. Housing Act of 1937 (42 U.S.C. 1437p)) in the plan Fiscal Year? (If “No”, skip to component 9; if “yes”, complete one activity description for each development.)

### 2. Activity Description

Yes  No: Has the PHA provided the activities description information in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 9. If “No”, complete the Activity Description table below.)

<b>Demolition/Disposition Activity Description</b>	
1a. Development name:	<b>ROYAL PALM TOWERS</b>
1b. Development (project) number:	<b>FL047 004</b>
2. Activity type:	Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one)	Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date application approved, submitted, or planned for submission:	<u>(30/09/07)</u>
5. Number of units affected:	101
6. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity:	a. Actual or projected start date of activity: 01/09 b. Projected end date of activity: 01/10

### **Demolition/Disposition Activity Description**

1a. Development name: <b>Michigan Court / Flossie Riley Garden Apts.</b>
1b. Development (project) number: FL 047-006
2. Activity type: Demolition <input checked="" type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one) Approved <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: <u>(27/10/05)</u>
5. Number of units affected: 470
6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 07/07 (MC) & 12/09 (FR) b. Projected end date of activity: 06/10

**9. Designation of Public Housing for Occupancy by Elderly Families or Families with Disabilities or Elderly Families and Families with Disabilities**

[24 CFR Part 903.7 9 (i)]

Exemptions from Component 9; Section 8 only PHAs are not required to complete this section.

1.  Yes  No: Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will apply for designation for occupancy by only elderly families or only families with disabilities, or by elderly families and families with disabilities as provided by section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year? (If “No”, skip to component 10. If “yes”, complete one activity description for each development, unless the PHA is eligible to complete a streamlined submission; PHAs completing streamlined submissions may skip to component 10.)

2. Activity Description

- Yes  No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If “yes”, skip to component 10. If “No”, complete the Activity Description table below.

<b>Designation of Public Housing Activity Description</b>	
1a. Development name: <b>BONAIR TOWERS</b>	
1b. Development (project) number: fl047-002	
2. Designation type:	Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one)	Approved; included in the PHA's Designation Plan <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <u>(27/01/03)</u>	
5. If approved, will this designation constitute a (select one)	<input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected: 101	
7. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

<b>Designation of Public Housing Activity Description</b>	
1a. Development name: <b>ROYAL PALM TOWERS</b>	
1b. Development (project) number: fl047-004	
2. Designation type:	Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one)	Approved; included in the PHA's Designation Plan <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: <u>(27/01/03)</u>	
5. If approved, will this designation constitute a (select one)	<input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected: 101	
7. Coverage of action (select one)	<input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development

<b>Designation of Public Housing Activity Description</b>	
1a. Development name: <b>FLOSSIE M.RILEY GARDEN APARTMENTS</b>	
1b. Development (project) number: FL047-006	
2. Designation type:	
Occupancy by only the elderly <input checked="" type="checkbox"/>	
Occupancy by families with disabilities <input type="checkbox"/>	
Occupancy by only elderly families and families with disabilities <input type="checkbox"/>	
3. Application status (select one)	
Approved; included in the PHA's Designation Plan <input checked="" type="checkbox"/>	
Submitted, pending approval <input type="checkbox"/>	
Planned application <input type="checkbox"/>	
4. Date this designation approved, submitted, or planned for submission: (27/01/03)	
5. If approved, will this designation constitute a (select one)	
<input checked="" type="checkbox"/> New Designation Plan	
<input type="checkbox"/> Revision of a previously-approved Designation Plan?	
7. Number of units affected: 120	
7. Coverage of action (select one)	
<input type="checkbox"/> Part of the development	
<input checked="" type="checkbox"/> Total development	

## **10. Conversion of Public Housing to Tenant-Based Assistance**

[24 CFR Part 903.7 9 (j)]

Exemptions from Component 10; Section 8 only PHAs are not required to complete this section.

### **A. Assessments of Reasonable Revitalization Pursuant to section 202 of the HUD FY 1996 HUD Appropriations Act**

1.  Yes  No: Have any of the PHA's developments or portions of developments been identified by HUD or the PHA as covered under section 202 of the HUD FY 1996 HUD Appropriations Act? (If "No", skip to component 11; if "yes", complete one activity description for each identified development, unless eligible to complete a streamlined submission. PHAs completing streamlined submissions may skip to component 11.)

#### 2. Activity Description

Yes  No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If "yes", skip to component 11. If "No", complete the Activity Description table below.

<b>Conversion of Public Housing Activity Description</b>
----------------------------------------------------------

<p>1a. Development name:</p> <p>1b. Development (project) number:</p>
<p>2. What is the status of the required assessment?</p> <p><input type="checkbox"/> Assessment underway</p> <p><input type="checkbox"/> Assessment results submitted to HUD</p> <p><input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question)</p> <p><input type="checkbox"/> Other (explain below)</p>
<p>3. <input type="checkbox"/> Yes <input type="checkbox"/> No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to block 5.)</p>
<p>4. Status of Conversion Plan (select the statement that best describes the current status)</p> <p><input type="checkbox"/> Conversion Plan in development</p> <p><input type="checkbox"/> Conversion Plan submitted to HUD on: (DD/MM/YYYY)</p> <p><input type="checkbox"/> Conversion Plan approved by HUD on: (DD/MM/YYYY)</p> <p><input type="checkbox"/> Activities pursuant to HUD-approved Conversion Plan underway</p>
<p>5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one)</p> <p><input type="checkbox"/> Units addressed in a pending or approved demolition application (date submitted or approved: _____)</p> <p><input type="checkbox"/> Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: _____)</p> <p><input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: _____)</p> <p><input type="checkbox"/> Requirements no longer applicable: vacancy rates are less than 10 percent</p> <p><input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units</p> <p><input type="checkbox"/> Other: (describe below)</p>

**B. Reserved for Conversions pursuant to Section 22 of the U.S. Housing Act of 1937**

**Voluntary Conversion Initial Assessments**

- a. How many of the PHA's developments are subject to the Required Initial Assessments? **2**
- b. How many of the PHA's developments are not subject to the Required Initial Assessments based on exemptions (e.g., elderly and/or disabled development not general occupancy projects)? **3**
- c. How many Assessments were conducted for the PHA's covered developments? **2**

- d. Identify PHA developments that may be appropriate for conversion based on the Required Initial Assessments:

**None were identified at this time as appropriate for conversion without additional upgrading of the facilities to render them market comparable.**

Development Name	Number of Units
None	

- e. If the PHA has not completed the Required Initial Assessments, describe the status of these assessments.

**The two completed assessments are on file at the HACFM main office.**

**C. Reserved for Conversions pursuant to Section 33 of the U.S. Housing Act of 1937**

**11. Homeownership Programs Administered by the PHA**

[24 CFR Part 903.7 9 (k)]

**A. Public Housing**

Exemptions from Component 11A: Section 8 only PHAs are not required to complete 11A.

1.  Yes  No: Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under section 5(h), the HOPE I program, or section 32 of the U.S. Housing Act of 1937 (42 U.S.C. 1437z-4). (If “No”, skip to component 11B; if “yes”, complete one activity description for each applicable program/plan, unless eligible to complete a streamlined submission due to **small PHA** or **high performing PHA** status. PHAs completing streamlined submissions may skip to component 11B.)

**NOTE: As part of a HOPE VI application approved in October, 2005, the HACFM is contemplating administering a Public Housing Homeownership Program in Michigan Court and Flossie M. Riley.**

2. Activity Description

- Yes  No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 12. If “No”, complete the Activity Description table below.)

<b>Public Housing Homeownership Activity Description (Complete one for each development affected)</b>
1a. Development name: 1b. Development (project) number:
2. Federal Program authority: <input type="checkbox"/> HOPE I <input type="checkbox"/> 5(h) <input type="checkbox"/> Turnkey III <input type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one) <input type="checkbox"/> Approved; included in the PHA’s Homeownership Plan/Program <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: (DD/MM/YYYY)
5. Number of units affected: 6. Coverage of action: (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development

**B. Section 8 Tenant Based Assistance**

1.  Yes  No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982? (If “No”, skip to component 12; if “yes”, describe each program using the table below (copy and complete questions for each program identified), unless the PHA is eligible to complete a streamlined submission due to high performer status. **High performing PHAs** may skip to component 12.)

2. Program Description:

a. Size of Program

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

If the answer to the question above was yes, which statement best describes the number of participants? (Select one)

- 25 or fewer participants
- 26 - 50 participants
- 51 to 100 participants
- More than 100 participants

b. PHA-established eligibility criteria

- Yes  No: Will the PHA's program have eligibility criteria for participation in its Section 8 Homeownership Option program in addition to HUD criteria?

If yes, list criteria below: **Must graduate from the FSS Program**

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

- 1. Continue to market the program to lenders, realtors and developers**
- 2. Continue to offer home buyer education**
- 3. Continue to recruit and prepare Section 8 participants for home ownership**

### **3. Capacity of the PHA to Administer a Section 8 Homeownership Program**

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

- a.  Establishing a minimum homeowner down-payment requirement of at least 3 percent of purchase price and requiring that at least 1 percent of the purchase price comes from the family's resources.
- b.  Requiring that financing for purchase of a home under its Section 8 homeownership will be provided, insured or guaranteed by the state or Federal government; comply with secondary mortgage market underwriting requirements; or comply with generally accepted private sector underwriting standards.
- c.  Partnering with a qualified agency or agencies to administer the program (list name(s) and years of experience below).
- d.  Demonstrating that it has other relevant experience (list experience below).
  - 1. Qualified staff and finance department**
  - 2. HACFM obtained HUD Certification as a Housing Counseling Agency**
  - 3. Partners through a HUD HOPE VI grant who operate other HUD Certified Home Buyer Education Programs**
  - 4. Partners through HUD ROSS NNC and Family Homeownership Grant applications who operate HUD Certified Home Buyer Education Programs, including local banks and real estate agencies.**

### **Project-Based Voucher Program**

- a.  Yes  No Does the PHA plan to "project-base" any tenant-based Section 8 vouchers in the coming year? If yes, answer the following questions.

b.  Yes  No Are there circumstances indicating that the project basing of the units, rather than tenant-basing of the same amount of assistance is an appropriate option?

If yes, check which circumstances apply:

- Low utilization rate for vouchers due to lack of suitable rental units
- Access to neighborhoods outside of high poverty areas
- Other (describe below)

**20% of non-elderly vouchers will be project-based in conjunction with the Hope VI tenant relocation efforts.**

d. Indicate the number of units and general location of units (e.g. eligible census tracts or smaller areas within eligible census tracts):

**20% of 300 non-elderly relocation vouchers will be project based into eligible census tracts.**

## **12. PHA Community Service and Self-sufficiency Programs**

[24 CFR Part 903.7 9 (l)]

Exemptions from Component 12: High performing and small PHAs are not required to complete this component. Section 8-Only PHAs are not required to complete sub-component C.

### **A. PHA Coordination with the Welfare (TANF) Agency**

1. Cooperative agreements:

- Yes  No: Has the PHA has entered into a cooperative agreement with the TANF Agency, to share information and/or target supportive services (as contemplated by section 12(d)(7) of the Housing Act of 1937)?

If yes, what was the date that agreement was signed? DD/MM/YY

2. Other coordination efforts between the PHA and TANF agency (select all that apply)

- Client referrals
- Information sharing regarding mutual clients (for rent determinations and otherwise)
- Coordinate the provision of specific social and self-sufficiency services and programs to eligible families
- Jointly administer programs
- Partner to administer a HUD Welfare-to-Work voucher program
- Joint administration of other demonstration program
- Other (describe)

### **B. Services and programs offered to residents and participants**

**(1) General**

a. Self-Sufficiency Policies

Which, if any of the following discretionary policies will the PHA employ to enhance the economic and social self-sufficiency of assisted families in the following areas? (Select all that apply)

- Public housing rent determination policies
- Public housing admissions policies
- Section 8 admissions policies
- Preference in admission to section 8 for certain public housing families
- Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA
- Preference/eligibility for public housing homeownership option participation
- Preference/eligibility for section 8 homeownership option participation
- Other policies (list below)

b. Economic and Social self-sufficiency programs

- Yes  No: Does the PHA coordinate, promote or provide any programs to enhance the economic and social self-sufficiency of residents? (If “yes”, complete the following table; if “no” skip to sub-component 2, Family Self Sufficiency Programs. The position of the table may be altered to facilitate its use. )

<b>Services and Programs</b>				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)
<i>Elderly Services Coordinator</i>	289	<i>All elderly Public Housing residents</i>	<i>On site, full time coordinator</i>	<i>Public Housing participants</i>
<i>Neighborhood Network Center</i>	<i>300-350 non-duplicated residents</i>	<i>1) Open to all residents all ages at certain times; 2) After school homework assistance; and 3) Meet education &amp; Training Selection Criteria</i>	<i>N N Center</i>	<i>Public Housing Residents</i>

<i>ROSS Family Program</i>	<i>75 families</i>	<i>Specific Criteria as provided in Grant program activities</i>	<i>NNCenter &amp; Other Providers</i>	<i>Public Housing residents</i>
<i>Certified Housing Counseling Program</i>	<i>50 –75 families</i>	<i>Open to PUBLIC HOUSING &amp; Sec 8 families, Housing Plans are formulated with each participant</i>	<i>NN Center &amp; partner providers</i>	<i>PUBLIC HOUSING &amp; Sec 8 residents</i>

**(2) Family Self Sufficiency program/s**

a. Participation Description

<b>Family Self Sufficiency (FSS) Participation</b>		
<b>Program</b>	<b>Required Number of Participants (start of FY 2005 Estimate)</b>	<b>Actual Number of Participants (As of: 30/08/07)</b>
Public Housing	30 approved slots	11 families
Section 8	100 approved slots	65 families

- b.  Yes  No: If the PHA is not maintaining the minimum program size required by HUD, does the most recent FSS Action Plan address the steps the PHA plans to take to achieve at least the minimum program size?  
If no, list steps the PHA will take below:

**C. Welfare Benefit Reductions**

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)
- Adopting appropriate changes to the PHA’s public housing rent determination policies and train staff to carry out those policies
  - Informing residents of new policy on admission and reexamination
  - Actively notifying residents of new policy at times in addition to admission and reexamination.
  - Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
  - Establishing a protocol for exchange of information with all appropriate TANF agencies
  - Other: (list below)

**D. Reserved for Community Service Requirement pursuant to section 12(c) of the U.S. Housing Act of 1937**

**COMMUNITY SERVICE PROGRAM IMPLEMENTATION**

*During FY 2008, the Housing Authority of the City of Fort Myers continued to implement the current HUD requirements of the Community Service program as follows:*

**IN-HOUSE PROGRAM DEVELOPMENT AND STAFF TRAINING**

- Held training classes for staff, including Development Managers, to review HUD regulations on involuntary eligible resident participation in the program. Trained staff how to respond to questions from residents.
- Drafted and posted appropriate Public Notices on the regulations concerning the Community Service Program to inform all Residents throughout the Housing Authority developments.
- Placed the item on the agenda of Resident Council Meetings to give residents an opportunity to review HUD regulations making the program non-voluntary.
- Provided tracking of service for participating residents.
- Maintained an internal filing system and reporting system so Housing Managers can regularly track and verify completion of any community service programs by residents who must participate in the program.
- Maintained a listing from the Volunteer Center of Lee County of non-profits in the Fort Myers area who are willing to participate in offering community service activities to residents who participate. The Senior Friendship Centers of Lee County and the United Way of Lee County also assist participating residents.
- Reviewed the lease to ensure compliance with CS requirements.
- Prepared an annual update article on the Community Service Program for the Newsletter to keep residents informed about the program.

**13. PHA Safety and Crime Prevention Measures**

[24 CFR Part 903.7 9 (m)]

Exemptions from Component 13: High performing and small PHAs not participating in PHDEP and Section 8 Only PHAs may skip to component 15. High Performing and small PHAs that are participating in PHDEP and are submitting a PHDEP Plan with this PHA Plan may skip to sub-component D.

**A. Need for measures to ensure the safety of public housing residents**

1. Describe the need for measures to ensure the safety of public housing residents

(select all that apply)

- High incidence of violent and/or drug-related crime in some or all of the PHA's developments
- High incidence of violent and/or drug-related crime in the areas surrounding or adjacent to the PHA's developments
- Residents fearful for their safety and/or the safety of their children
- Observed lower-level crime, vandalism and/or graffiti

- People on waiting list unwilling to move into one or more developments due to perceived and/or actual levels of violent and/or drug-related crime
- Other (describe below)

2. What information or data did the PHA used to determine the need for PHA actions to improve safety of residents (select all that apply).

- Safety and security survey of residents
- Analysis of crime statistics over time for crimes committed “in and around” public housing authority
- Analysis of cost trends over time for repair of vandalism and removal of graffiti
- Resident reports
- PHA employee reports
- Police reports
- Demonstrable, quantifiable success with previous or ongoing anticrime/anti drug programs
- Other (describe below)

3. Which developments are most affected? (List below)

**Palmetto Court and Southward Village**

**B. Crime and Drug Prevention activities the PHA has undertaken or plans to undertake in the next PHA fiscal year**

1. List the crime prevention activities the PHA has undertaken or plans to undertake: (select all that apply)

- Contracting with outside and/or resident organizations for the provision of crime- and/or drug-prevention activities
- Crime Prevention through Environmental Design
- Activities targeted to at-risk youth, adults, or seniors
- Volunteer Resident Patrol/Block Watchers Program
- Other (describe below)

2. Which developments are most affected? (list below)

**All Public Housing Developments are affected.**

**C. Coordination between PHA and the police**

1. Describe the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities: (select all that apply)

- Police involvement in development, implementation, and/or ongoing evaluation of drug-elimination plan
- Police provide crime data to housing authority staff for analysis and action
- Police have established a physical presence on housing authority property (e.g., community policing office, officer in residence)
- Police regularly testify in and otherwise support eviction cases
- Police regularly meet with the PHA management and residents
- Agreement between PHA and local law enforcement agency for provision of above-baseline law enforcement services
- Other activities (list below)

2. Which developments are most affected? (List below)

**All Public Housing Developments are affected**

**D. Additional information as required by PHDEP/PHDEP Plan**

PHAs eligible for FY 2005 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

**PHDEP NO LONGER APPLIES**

- Yes  No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes  No: Has the PHA included the PHDEP Plan for FY 2005 in this PHA Plan?
- Yes  No: This PHDEP Plan is an Attachment. (Attachment Filename: \_\_\_\_)

**14. RESERVED FOR PET POLICY**

[24 CFR Part 903.7 9 (n)]

**The HACFM has adopted a pet policy covering all units, elderly and family. The policy (Section 18) is on file at the main office of the housing authority and does not apply to pets that are used to assist persons with disabilities. A summary of the main aspects of the policy are as follows:**

- Pets are limited to domesticated dogs, cats, birds and fish in aquariums. The Housing Authority reserves the right to limit size and number. Animals deemed to be potentially harmful to health or safety of others will not be allowed (including attack or fight trained dogs – pit bulls). Residents in all units must register pets with the Community Services Bureau by submitting a Pet Registration Form with a photo of the pet. Owners must provide records to the Property Managers that pet is properly inoculated and licensed and also provide name and phone number of individual who will be responsible for the pet in event of resident absence or illness.
- A refundable security deposit of \$250 is required for all developments, along with verification of a liability insurance policy covering the pet at time of registering the pet.
- Owners are liable for amount of all damages to HACFM caused by their pet.

Owners shall be liable for entire amount of injury to person or property of other residents, staff or visitors caused by their pet and shall indemnify FMHA for all cost of litigation and attorney's fees resulting from damage.

- Owners must maintain pets in living quarters in manner to prevent odors and other unsanitary conditions in owner's unit and surrounding areas.
- Complaints regarding pets disturbing neighbors will result in owner having to remove the pet or owner eviction.
- Owners must keep pets in owner's apartment or on leash at all times when outside. No outdoor cages are allowed.
- Pets are allowed only on designated pet areas on the grounds. Owners must clean up after their pets and are responsible for disposing of pet waste. Animals are not allowed in common rooms or dining rooms and should be carried if possible in elevators.
- Pets cannot be left unattended on a lease connected to clotheslines, poles or any object outdoors.
- If work is to be done in a pet owners unit, the owner must either be home or arrange for pet to be contained or removed from the unit.

## **15. Civil Rights Certifications**

[24 CFR Part 903.7 9 (o)]

Civil rights certifications are included in the PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations.

## **16. Fiscal Audit**

[24 CFR Part 903.7 9 (p)]

1.  Yes  No: Is the PHA required to have an audit conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h))?  
(If no, skip to component 17.)
2.  Yes  No: Was the most recent fiscal audit submitted to HUD?
3.  Yes  No: Were there any findings as the result of that audit?
4.  Yes  No: If there were any findings, do any remain unresolved?  
If yes, how many unresolved findings remain? \_\_\_\_\_
5.  Yes  No: Have responses to any unresolved findings been submitted to HUD?  
If not, when are they due (state below)?

## **17. PHA Asset Management**

[24 CFR Part 903.7 9 (q)]

Exemptions from component 17: Section 8 Only PHAs are not required to complete this component. High performing and small PHAs are not required to complete this component.

1.  Yes  No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock , including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have **not** been addressed elsewhere in this PHA Plan?
  
2. What types of asset management activities will the PHA undertake? (select all that apply)
  - Not applicable
  - Private management
  - Development-based accounting
  - Comprehensive stock assessment
  - Other: (list below)
  
3.  Yes  No: Has the PHA included descriptions of asset management activities in the **optional** Public Housing Asset Management Table?

## **18. Other Information**

[24 CFR Part 903.7 9 (r)]

### **A. Resident Advisory Board Recommendations**

1.  Yes  No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
  
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
  - Attached at Attachment (File name)
  - Provided below:

#### **Bonair Towers Annual Plan input concerning this property:**

Replace windows: Already included in our five year and annual plan is money for the new window installation at Bonair Towers, however there is a process that has to be followed. Funds were allocated by Lee County and the Department of Community Affairs for the window project. The other items of discussion did not pertain to the annual plan.

#### **Flossie Riley Garden Apartments Annual Plan input concerning this property:**

There were no items presented. The items Mrs. Hall questioned did not pertain to the five year or annual plan.

**Palmetto Court Annual Plan input concerning this property: None.**

**Royal Palm Towers Annual Plan input concerning this property: None.**

**Southward Village Annual plan input concerning this property Items requested:**

This development site has received new windows, a new roof on each unit. Additionally, all units have been painted. There were no other matters regarding the annual plan.

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

- Considered comments, but determined that no changes to the PHA Plan were necessary.
- The PHA changed portions of the PHA Plan in response to comments  
List changes below:
- Other: (list below)

### B. Description of Election process for Residents on the PHA Board

- 1.  Yes  No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)
- 2.  Yes  No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)

### 3. Description of Resident Election Process

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

- Candidates were nominated by resident and assisted family organizations
- Candidates could be nominated by any adult recipient of PHA assistance
- Self-nomination: Candidates registered with the PHA and requested a place on ballot
- Other: (describe) **Appointed by Mayor of City of Fort Myers**

b. Eligible candidates: (select one)

- Any recipient of PHA assistance
- Any head of household receiving PHA assistance
- Any adult recipient of PHA assistance
- Any adult member of a resident or assisted family organization
- Other (list)

c. Eligible voters: (select all that apply)

- All adult recipients of PHA assistance (public housing and section 8 tenant-based assistance)
- Representatives of all PHA resident and assisted family organizations
- Other (list)

### C. Statement of Consistency with the Consolidated Plan

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

1. Consolidated Plan jurisdiction: (provide name here) **City of Fort Myers, FL**
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)

- The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
- The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
- Other: (list below)

4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below) **The Consolidated Plan supports the PHA Plan by signing off on consistency with all Federal grants and by inviting PHA participation in planning process. The Consolidated Plan provides assistance down payment and closing cost assistance to families participating in the Housing Choice Voucher Program.**

### D. Other Information Required by HUD

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

#### 1. Amendment and Deviation Definitions

24 CFR Part 903.7(r)

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

In accordance with PIH notice 99-51 (HA) issued December 14, 1999, PHA's must define "substantial deviation" of Annual Plans from the 5-Year Plan and "significant amendment or modification" of the Annual Plan. The Quality Housing and Work Responsibility Act of 1998 requires that PHA's explain "substantial deviation" from the 5-Year Plan in their Annual Plans. The Act also provides that, while PHAs may change or modify their plans or policies described in them, any "significant deviation" to the plan would require PHAs to submit a revised PHA plan that has met full public process requirements.

The Housing Authority of the City of Fort Myers' definition of "substantial deviation" of Annual Plans from the 5-Year Plan and "significant amendment or modification" of the Annual Plan will consider the following to be significant amendments or modifications:

**CRITERIA FOR DETERMINING SUBSTANTIAL DEVIATION AND SIGNIFICANT AMENDMENT OR MODIFICATION:**

**Substantial Deviation:**

The Housing Authority of the City of Fort Myers, after submitting its Annual Plan to HUD, may modify, amend or change any policy, rule, regulation or other aspect of its plan. If any modifications, amendments or changes in any policy, rule, regulation or other aspect of the plan are not inconsistent with the Housing Authority of the City of Fort Myers' Mission Statement, its Goals and Objectives, or HUD regulations, then these shall not be deemed significant amendments or modifications to the Annual and 5-Year Plan. If new program activities are required or adopted to reflect changes in HUD regulations or as a result of national or local emergencies, these activities are exempted actions and will not be considered as Substantial Deviation from the 5-year Plan.

- If any new program activities undertaken do not otherwise further the Housing Authority of the City of Fort Myers's Mission Statement and Goals and Objectives, then such activities may be considered a substantial deviation from the 5-Year Plan.
- If there is insufficient budget authority from HUD necessitating the need to alter, reduce or terminate any specific program activity, this change in activity may be considered a Substantial Deviation, depending upon whether the change in activity reflects an overall change in the direction of the Housing Authority's goals and objectives.

Significant Amendment/Modification:

- A change in policy pertaining to the operation of the Housing Authority relating to major strategies to address housing needs and to major policies governing eligibility, selection or admissions and rent determination will be considered Significant Amendments or Modifications. All significant modifications require full public process.
- New program activities that are required or adopted to reflect changes in HUD regulations or are implemented due to national or local emergencies are Exempted actions and will not be considered Substantial Amendments or Modifications to the 5 year or Annual Plan.
- The HA may set funds in a line item where there were none. New work items (excluding Emergency Work items) that are not included in the CFP and that cumulatively exceed 10% of the fiscal year's CFP (\$150,000), may be considered Significant Amendments or Modifications.
- Changes in use of the replacement reserve under the CFP may be considered Significant Amendments or modifications.
- Demolition and or/disposition activities, new or amended development plans, designation or conversion actions not currently identified in the 5-year plan may be considered Significant Amendments or Modifications.

**Significant Amendment/Modification**

- **In FY 2009 the HACFM intends to implement a major renovation of Southward Village Community Center. \$700,000 is included in the 5-yr CFP.**
- **In 2009, the HACFM intends to construct a New Administration Building. \$1,000,000 of the cost is included in the 5 yr CFP.**
- **In 2009, the elevator will be modernized an new Fire Sprinkler System installed at Royal Palm Towers**

- In 2009 Bonair Towers elevator modernization project will be delayed

<b>2. Current Listing of the Board of Commissioners of the Housing Authority of the City of Fort Myers</b>
------------------------------------------------------------------------------------------------------------

<u>Commissioner</u>	<u>Terms</u>	
Bill Barnwell, Chairman 4224 Michigan Avenue Fort Myers, FL 33916	4/2/2001 6/6/2005	6/6/2005 6/6/2009
Lemuel Teal, Vice-Chairman 4224 Michigan Avenue Fort Myers, FL 33916	4/1/2001 3/6/2003 3/6/2007	3/6/2003 3/6/2007 3/6/2011
Joseph D'Alessandro, Commissioner 4224 Michigan Avenue Fort Myers, FL 33916	9/15/2003 3/6/2007	3/6/2007 3/6/2011
Peter Routsis-Arroyo, Commissioner 4224 Michigan Avenue Fort Myers, FL 33916	4/1/2001 3/6/2002 3/6/2006	3/6/2002 3/6/2006 3/6/2010
E. Bruce Strayhorn, Commissioner 4224 Michigan Avenue Fort Myers, FL 33916	2/1/1988 5/7/1992 3/7/1994 3/7/1998 3/6/2002 3/6/2006	3/6/1992 3/6/1994 3/6/1998 3/6/2002 3/6/2006 3/6/2010
Douglas A. Hogg, Commissioner Royal Palm Towers 2424 Edwards Drive, Unit 601 Fort Myers, FL 33901	10/6/2008	3/6/2012

<b>3. Current Listing of HACFM Resident Advisory Board Members</b>
--------------------------------------------------------------------

**Ed Jankowski**  
Royal Palm Towers Apartments

**Barbara Hall**  
Flossie M. Riley Apartments

**Iglory Perry**  
(Acting President) Palmetto Court

**Patricia Watts**  
Southward Village

**Don Blaney**  
Bonair Towers

#### **4. ASSESSMENT OF DEMOGRAPHIC CHANGES IN PUBLIC HOUSING PROPERTIES WITH SITE-BASED WAITING LISTS - See Page 21**

#### **5. VIOLENCE AGAINST WOMEN ACT - Implementation**

During 2007 & 2008, the HACFM continued to implement PIH Notice 2006-42 concerning Violence Against Women and Justice Department Reauthorization Act 2005 & Form HUD – 50066 Certification of Domestic Violence, Dating Violence, or Stalking, in both Public Housing and Section 8 (both Project Based and Voucher) programs.

#### **6. Follow Up Plan to HUD's RASS Survey - 2008**

##### **Safety:**

1. All developments will continue to hold monthly meeting with their residents and resident councils. Meeting agendas will continue to have Resident, Management and Police Input as well as a Questions & Answer period.
2. Management at all developments will continue to send out Resident Flyers with pertinent information and helpful reminders.
3. Police Involvement will continue at all developments:
  - Bonair Towers and Royal Palm Senior developments will continue to have a Fort Myers Police Office live on site. This officer meets weekly with the Property Manager and has scheduled hours that he or she meets with the residents to discuss any safety/security concerns they may have.
  - Resident Police Office will continue to have a suggestion box outside of their unit for residents to put in their suggestions during the officers working hours and/or sleeping hours.
  - All Family Developments will continue to have an assigned FMPD Housing Officers. These officers will continue to work closely with Residents and Management, attend all monthly resident meetings and patrol during the day and evening.
  - FMPD Housing Officers have an office located in the Managers office on Southward Village for the convenience of the Police and Residents.
  - FMPD Housing Officers are required to attend all Resident Meeting as well as the monthly Board Meetings. These officers come prepared to answer any questions they residents or persons from the audience may have.
  - FMPD Housing officers provide Management with detailed reports of all crimes that occur on their developments.
  - HACFM has partnered with FMPD and entered into a contract for services that include but are not limited to:
    1. Daily and evening patrols seven (7) days a week

2. Run all NCIC for new applicants and renewals
  3. Work one-on-one with Management and Residents
  4. Attend all Resident/Management and Board meetings
  5. Provide quick response to incidents that occur on all developments
  6. FMPD assists management in holding resident accounting for upholding their Lease, House Rules, Pet Policy and all other policies and regulations
  7. HACFM has provided FMPD with an on site office
  8. Weekly meetings with property manger
  9. HACFM allow FMPD to use vacant units for surveillance
  10. FMPD provides counseling to adults and children
  11. Abandon Vehicle removal program (tag, ticket and tow)
  12. Provide HACFM with crime reports
- Management actively promotes interaction between residents and police department through individual and group meetings.
  - Management is provided repots from FMPD regarding property activity.
  - HACFM screens all new applicants and lease renewals per 24 CFR part 5.
  - HACFM holds residents accountable for their behavior while on a development.
  - Additional lights have been installed on the senior developments. HACFM recruited resident input when during the planning stages of adding lights.
  - HACFM had added security camera on the senior developments at the request of the residents. Cameras are monitored by the property manager and onsite police officer.
  - Southward Village and Palmetto Court developments had new playground equipment installed for children ages 2-12 giving them a safe place to play during the day.
  - Palmetto Court has a neighborhood network center for pre teens and teenagers giving them a safe place to gather after school.
  - Boys & Girls Club has reached out to public housing families to get teenagers signed up in activities.

**Neighborhood Appearance:**

- All properties are maintained by HACFM maintenance with high standards in place.
- HACFM has contracted out lawn service for several properties to a company who is better able and equipped to service such large developments.
- HACFM provides resident stipends for those who are interested in keeping the grounds picked up and clean.
- HACFM allows residents to perform their community service requirement on properties to assist in keeping the grounds picked up and clean.
- All units and properties are checked monthly during pest control service for damage or other maintenance items.
- All unlicensed, unregistered or dismantled cars are tagged and towed by FMPD.
- HACFM maintains its grounds, parking lots and parking surfaces daily.
- HACFM enforces its parking policy and holds all residents responsible for not parking on the grass or other unauthorized areas.
- HACFM grounds crew checks all properties daily for bulk trash pick up.

- Southward Village buildings/units are under contract to be painted giving the development a fresh new modern look.
- Southward Village and Palmetto Court are under contract to have new Hurricane Windows installed before the year end.
- Bonair Towers is under contract to have new windows installed starting in January 2009
- Bonair Towers and Royal Palm Towers are scheduled to have the buildings power washed as a capital improvement.
- Bonair Tower and Royal Palm Towers are under contract to have their elevators, lobbies, bathrooms, kitchens and other common areas cleaned two times per week as well as HACFM keeping the areas clean daily.
- Graffiti is removed within a 24 hour period on all developments upon discovery of it.
- Property Managers are instructed to walk their development no less than three times per week.

### **Attachments**

Use this section to provide any additional attachments referenced in the Plans.

Attachment files submitted electronically to HUD with this plan:

- (1) fl047a01 – Capital Fund Tables for PHA FY 2009 –2013
- (2) fl047b01 – P & E 09/30/07 for CFP FY 2008
- (3) fl047c01 – P & E 09/30/07 for CFP FY 2007
- (4) fl047d01 – P & E 09/30/07 for CFP FY 2006
- (5) fl047e01 – P & E 09//30/07 for CFP FY 2005

