

PHA Plans

**Streamlined 5-Year/Annual
Version**

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

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

Streamlined 5-Year Plan for Fiscal Years 2005 - 2009

Streamlined Annual Plan for Fiscal Year 2005

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

Streamlined Five-Year PHA Plan Agency Identification

PHA Name: Missoula Housing Authority

PHA Number: MT033

PHA Fiscal Year Beginning: (mm/yyyy) 10/2005

PHA Programs Administered:

Public Housing and Section 8 **Section 8 Only** **Public Housing Only**

Number of public housing units: 168

Number of S8 units: 754

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:

Main administrative office of the PHA
1235 34th Street
Missoula, MT 59801

Display Locations For PHA Plans and Supporting Documents

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

Main administrative office of the PHA
1235 34th Street
Missoula, MT 59801

PHA Plan Supporting Documents are available for inspection at:

Main business office of the PHA
1235 34th Street
Missoula, MT 59801

Streamlined Five-Year PHA Plan

PHA FISCAL YEARS 2005 - 2009

[24 CFR Part 903.12]

A. Mission

- 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: The Mission of the Missoula Housing Authority is to provide decent, safe, affordable housing, and to foster among the residents we serve, self-sufficiency, economic independence, upward mobility, and a sense of participation in the economic and political system. (Adopted 5/30/96, reviewed at 2003 & 2005 board retreats)**

B. Goals

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

- PHA Goal: Expand the supply of assisted housing**
Objectives:
- Apply for additional rental vouchers:**
 - Reduce public housing vacancies:**
 - Leverage private or other public funds to create additional housing opportunities:**
 - Acquire or build units or developments**
 - Other (list below)
- PHA Goal: Improve the quality of assisted housing**
Objectives:
- Improve public housing management: (PHAS score) to 100%**
 - Improve voucher management: (SEMAP score) to 100%**
 - Increase customer satisfaction:**
 - Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections)**
 - Renovate or modernize public housing units:**
 - Demolish or dispose of obsolete public housing:
 - Provide replacement public housing: 6 units approved 5/2005**
 - 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: increase from 8 to 12 owners**
- Implement public housing or other homeownership programs:
- Implement public housing site-based waiting lists:
- Convert public housing to vouchers:
- Other: (list below)

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)

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)

5-Year Plan MHA Fiscal Years 2005 - 2009

A. Mission

The Mission of the Missoula Housing Authority is to provide decent, safe, affordable housing, and to foster among the residents we serve, self-sufficiency, economic independence, upward mobility, and a sense of participation in the economic and political system. (adopted 5/30/96)

B. Goals

I. MAXIMIZE QUALITY AND REACH OF MHA AFFORDABLE HOUSING PROGRAMS

A. Operate existing housing programs for residents, program participants, and applicants in an efficient, effective, and equitable manner.

1. Develop quality control systems to assure that resident satisfaction is high and that MHA is delivering maintenance in a cost-effective manner.
2. Supplement basic staff complement with open purchase contracts for skilled maintenance services to address mismatches in workload and staffing levels.
3. Develop a system of benchmark performance measurements and standards that provides key comparable indicators to the private sector real estate standards. Train existing and new employees to meet benchmarks in general maintenance.
4. Implement the expanded use of private management companies for different components of MHA's portfolio in terms of overall cost effectiveness and complexity of implementation.
5. Structure a portion of MHA's rental housing so that it will serve populations that the private market cannot provide for, including those whose income would qualify them for public housing and special population including but not limited to the elderly, disabled, homeless, veterans, post foster care young adults, and smaller households.
6. Revise the Housing Quality Standards to increase health and safety requirements that will ensure that Section 8 housing is safe while maintaining a high supply of available rental units.
7. Improve the grievance hearing process by training non-staff members such as students from the University of Montana to serve as hearing officers or provide assistance to residents appearing at hearings.
8. Establish a preventive maintenance program to improve unit marketability and decrease the time between vacancy and re-renting units.
9. Establish a protocol to ensure that MHA stays current with program changes and takes advantage of regulatory waivers and other opportunities.
10. Work towards obtaining Moving to Work designation or receiving similar waivers that provide for flexible operations.
11. Obtain funding for a staff person to serve as a coordinator for Elderly/Disabled services.

12. Organize tenants into tenant-based organizations (Tenant Resident Councils) to help set policies, programs, and standards for individual projects
13. Organize the agency departments to reflect optimal Customer Service and Satisfaction, in an effort make agency more efficient.

B. Implement development-specific strategies that coordinate physical improvements and redesign, market niche, level of affordability, form of ownership and means required to obtain resources to execute strategy.

1. Develop in-house capacity to create redevelopment pro formas that combine multiple sources of funding, especially pro formas that do not rely on Development Fund as a major source of funding.
2. Provide ongoing technical assistance to the leadership of the Resident Advisory Board (RAB) for a better understanding of management and mixed finance technical issues.
3. Implement the portfolio-wide capital needs assessment completed of MHA's properties to determine the extent of investment necessary to retain those properties and to develop an on-going preventative maintenance and capital replacement schedule. Make other improvements to the public housing units to increase livability and make more market competitive.
4. Develop and implement a plan to dispose of additional public housing units based upon the results of the capital needs assessment including some or all units in Projects 009, 011, 012, and 014.
5. Implement the recommendations of the recently completed accessibility and adaptability study through the renovation of housing units and improvements to sites.
6. Complete a portfolio-wide master plan of MHA's units in conjunction with a review of affordable housing needs in MHA's jurisdiction. If possible, coordinate that master plan with City, County, HRC, and University efforts and programs, including modifying the scope of services to address their concerns, and seek financial participation from them.
7. Partner with the City, County, State and other entities to improve MHA developments and the surrounding neighborhoods with additional of improvements such as playgrounds particularly, but not limited to, Projects 011 & 012
8. Pursue partnerships with local supportive service providers to acquire land, purchase existing housing, and develop new housing with or without supportive service programs;
9. Acquire land, purchase existing housing, rehabilitate buildings, demolish structures as needed, and construct new dwelling units to build replacement public housing and mixed-use, mixed-financed, and/or mixed-income developments of a size and scale that is in keeping with the neighborhood and of the highest architectural design.
10. Build affordable housing to be built on Orchard Promenade site also known as the Edgell Property off of Reserve Street.
11. Use Replacement Housing Factor funding for new public housing to be built on Franklin Street site.
12. Complete and implement plans for the substantial modernization of the exterior of the Toole Street project.
13. Build transitional and permanent housing for veterans including but not limited to homeless veterans;
14. Complete the renovations and construction of additional units on the Vantage Villa site.
15. Develop and implement plan to develop rural site known as LaFray Lane in coordination with Emma Dickinson/River Road Neighborhood Infrastructure plan
16. Develop and implement plan of development for site that currently houses The Joseph Residence on Rattlesnake Drive.
17. Further develop plan for affordable housing on mixed-use, mixed-income urban redevelopment site.
18. Develop and implement plans for future development of Single Room Occupancy projects

19. Coordinate with local agencies to provide housing for aging and elderly population.
20. Coordinate with local redevelopment agency on housing needs for urban renewal areas.
21. Develop and implement a plan for a higher a better use of the Speedway Avenue properties.
22. Seek additional sources of funds from local, State, Federal entities as well as private institutions and foundations in order to add improvements to MHA developments including but not limited to tax credit, Continuum of Care, HOME, and other HUD and non-HUD resources such as the Federal Reserve Bank system and Missoula Redevelopment Agency.
23. Work with business and for-profit corporations to provide subsidized housing through such mechanisms as tax credits or special governmental and non-governmental sources.
24. Partner with existing providers of subsidized housing to improve the availability of housing units, maintain high quality management and maintenance, and financial solvency.
25. Create alliances with Missoula's neighborhood councils and foster joint planning and better community relationships.
26. Investigate and implement as appropriate bond funding to make progress on capital improvement plans for portfolio reengineering.
27. Shift MHA-owned property towards multi-family configuration and establish site-based waiting lists where appropriate.
28. Work with the City of Missoula to locate public facilities on or near public housing sites so that Supportive and Community Service agencies can be closer to public housing residents.
29. Work with Missoula Park and Recreation Department to acquire unusable small parcels for future housing development
30. Partner with local CDC's and others to acquire, renovate, and hold property to enable the use of those properties for affordable homeownership opportunities.
31. Develop and implement plans for constructing or purchasing of homes to sell to Section 8 Homeownership voucher holders.
32. Expand MHA's efforts at providing additional homeownership opportunities including, but not limited to, development of new units and relocation of existing buildings onto new parcels particularly, but not limited to, areas near the University slated for demolition.
33. Expand MHA's efforts to become Missoula's tax credit property management specialist, property maintenance, and land development for its and other tax credit properties, and to use those skills to promote affordable housing region wide including areas outside of MHA's current jurisdictional boundaries.
34. Continue to lend funds to non-profit organizations including, but not limited to, Garden City Neighbors, Intermountain Development Corporation, Kilkenny Corporation, Maclay Commons Limited Partnership, and others to purchase and hold property for future development or to fund either on the short or long term predevelopment and development costs and financing.
35. Implement plans to add new housing products into the Missoula market including, but not limited to, condominiums, cooperative housing, mutual housing, assisted living, and land trust properties;
36. Advocate for changes in municipal development policies and regulations, and in State statutes that advance the development of affordable housing;
37. Undertake a public education effort to inform the public of the supply and cost of housing as well as other relevant facts regarding affordable housing and general development needs within the community.
38. Undertake an effort to create partnerships with other organizations such as the Chamber of Commerce, Board of Realtors, Building Industry Association, and others to advance the cause of affordable housing provision, and to create educational information and reports to inform the public on a regular basis of the status of efforts in the City in that direction and of basic data needed to evaluate development proposals;

39. Negotiate with the City of Missoula and others to obtain tax foreclosed or other publicly held properties that can be rehabilitated to add affordable housing in the community.
40. Establish policies and procedures for a Project-based Section 8 Program, issue RFP for future application rounds, and award PBV's to profit and non-profit entities that support development and rehabilitation of neighborhoods, promote homeownership, assisted needy population and minority groups, and rehabilitate and build additional affordable housing.
41. Establish loan pools for use by non-profits or to be loaned directly to clients for acquisition and rehabilitation of property, and to fund necessary predevelopment work.
42. Restructure MHA's headquarters building to provide additional office space and a more readily accessible space or create a new location for MHA's offices that will permit additional expansion space and that will locate the facility closer to other governmental entities and supportive services including the use of some of the premises for market rate office space to help defer the cost of construction and operation.
43. Continue to assess MHA's scattered site properties to ensure they are meeting the demands for housing and match with our waiting list and dispose of those properties that do not meet those and future demands;.
44. Investigate and implement as appropriate the use of New Markets Tax Credits in mixed use developments
45. Investigate and implement as appropriate the use of ACC subsidies from sold public housing units for new public housing provided by MHA, non-profit entities, and others.
46. Locate a new warehouse that will replace the facility located currently at the Toole site and the rental property on Schilling.
47. Supplement staff capacity through the use of consultants, architects and engineers, and fee accountants and other professionals to reduce staff expenses while obtaining the information necessary to make decisions regarding the management and operations of MHA.
48. Expand MHA's reach to include the area within its jurisdiction but outside the City of Missoula, and explore development and technical assistance in a greater area.
49. Develop and implement plans to merge MHA's responsibilities with other housing authorities or to accept programs from other housing authorities;

C. Develop Client Service Center to assist PHA and Section 8 applicants and program participants with MHA administrative requirements and processing. The Service Center will also serve as ombudsmen for program participants having bureaucratic difficulties and as a liaison to resident organizations.

1. Implement applicant and new resident orientation and training programs that are supported by the MHA lease or condition of lease approval.
2. Create customer service procedures for tracking contacts to identify areas for operational improvement.
3. Complete transition to Central File System within Service Center that will contain all applicant and program participant files and information.
4. Implement the use of technology such as scannable forms and electronic records to reduce data inputting needs and paper files.
5. Create and improve MHA website to provide information about MHA programs and the ability to contact MHA staff or submit requests for pre-applications through the Internet.
6. Develop comprehensive housing search database covering city and local suburbs that can be accessed via the Internet.
7. Explore use of video, other media to improve communications with customers.
8. Modify the Administrative Plan and Admissions and Continued Occupancy Policies as needed to support these goals and objectives, to match HUD requirements or best practices, or to meet local market needs.

D. Promote deconcentration of poverty and diversity in all aspects of MHA programs while providing the maximum degree of choice to participants. This will require development of reporting systems that track MHA program demographics by census tract.

1. Establish development-based waiting lists in MHA family and mixed population developments and those supported through project-based vouchers or other similar funding stream thus making all MHA properties developments of choice. Specifically establish site based waiting lists for the new projects for the Veterans on Mullin Road, elderly housing in Hellgate Meadows, Uptown Motel SRO, the Joseph Residence on Reserve Street, and other projects currently being developed by MHA or its non-profit affiliates.
2. Use MHA demographic information to coordinate with City Planning Office's capacity to create GIS maps and other visual tools to assess the relationship of MHA developments and Section 8 Program utilization to each census tract and neighborhood.
3. Develop quarterly reporting system that trends basic demographics for each development and each MHA waiting list.
4. Coordinate with the annual cycle for development of the Housing Agency Plan any modifications to waiting list selection and inter and intra-program transfer policies to promote program diversity.
5. Provide Section 8 vouchers for relocation linked to development or improvement of property that receives MHA investment, or in support of the development or purchase of affordable housing.
6. Revise MHA's lease and tenant handbook.
7. Apply for such additional Section 8 vouchers or other rent subsidies that can be applied in Missoula or a larger jurisdiction that promotes deconcentration of poverty.

E. Develop security strategies for each MHA development that assure stable and safe communities.

1. Develop, in collaboration with each family development and the Missoula Police Department, an expanded security awareness program.
2. Continue the development of rapid intervention tools for problem households including non-trespass orders, mandatory training programs for housecleaning, and court-stipulated agreements.
3. Expand relationships with federal and local inter-agency task forces to directly address locations of drug activities including use of undercover operations.
4. Strengthen lease enforcement for drug related and other criminal activity.
5. Continue to support and expand the current Community Police program.
6. Explore the renting of Public Housing units to police, fire, or other public safety or supportive service governmental personnel who will help to stabilize sites and neighborhoods.

F. Develop MHA affiliated non-profit organizations, including a Community Housing Development Organization (CHDO), to assist Authority with redevelopment activities.

1. Incorporate or assume the administration of such non-profit organizations as may advance MHA's mission.
2. Establish a Board of Directors for MHA's non-profits that combines low-income individuals, MHA and City representatives with outside Directors that bring skill sets and networks that can support the major level of redevelopment of MHA's portfolio that must occur over the next decade.
3. Using MHA's Master Plan determine how the non-profits could assist MHA with implementation of neighborhood housing strategies arising out of site-specific public housing redevelopment actions.

4. Consider development of non-profits resource base by transfer of selected assets such as scattered site developments.

G. Design and implement homeownership programs using Section 8 subsidies to support mortgage payments as well as the conversion of acquired and new construction scattered sites to homeownership opportunities.

1. Consult with City of Missoula and local real estate developers to develop a program using the new statutory ability to use Section 8 to support mortgages. A key issue will be identification of sites and existing residential structures (perhaps tax lien properties) that can provide the “product” for the program. Determine if MHA-owned scattered site developments may be an appropriate starting place.
2. Develop a Memorandum of Agreement with the CHDO to take the lead on construction or rehabilitation of home-ownership product for use in a MHA Section 8 Home-ownership Program.
3. Investigate and implement as appropriate new buildings
4. Identify a local entity with the ability to provide home-ownership counseling and post-purchase support and contract for these services on a household-by-household basis.
5. Meet with local banks and lenders to explain the new abilities of the Section 8 Program. Determine the feasibility of a loan pool supported by a consortium of banks to share risk and Community Reinvestment Act (CRA) credit.

III. IMPROVE MANAGEMENT SYSTEMS

A. Complete transition to new integrated management information system

1. Continue integration of a new computer system into MHA operations, including refinement of comprehensive reporting on program utilization, performance indicators, income and expense information, program demographics, and a variety of operational activities such as rent collection, eviction process, work-orders, etc.
2. Refine and expand Intranet system to facilitate internal communication and access to approved policies, procedures, forms and other management tools.
3. Complete upgrade to new Windows version of Tenmast Software when available and provide training to staff.

B. Implement and sustain employee evaluation procedures to provide fair and accurate assessments of staff based upon utilization of skills, quality of work, job knowledge, supervisory initiative and aptitude, efficiency of execution, and ability to perform in a manner that supports agency goals and objectives.

1. Refine and expand policies and procedures for annual and interim employee evaluations.
2. Revise MHA’s personnel policies to reflect current practices in the industry and to meet local customs and practices.
3. Develop appropriate evaluation criteria for each type of position on an “include but not limited to” basis.
4. Determine the feasibility of a performance based bonus system tied to meeting department goals and objectives and implement such a program if feasible. This system would have to avoid FLSA pay rate complications regarding “quid pro quo” bonus arrangements and also be limited in fiscal years during which the financial position of the Authority makes such payments not prudent.
5. Train supervisors and employees on evaluation system and its objectives.

6. Enroll and offer courses through Nan McKay and similar vendors to provide updated training opportunities through either on-line or on-site venues.
7. Investigate and partner with similar agencies to contract for human resource management services.

C. Increase financial accountability of MHA operations and increase reserves.

1. Refine Departmental Budgets and reporting to better define and clarify MHA overhead factors.
2. Develop Service Contract cycles and bidding systems.
3. Develop system to monitor in-house and contract vacancy turnover programs on both cost and quality.
4. Modernize warehouse and inventory controls to account for decentralized staff materials needs.
5. Maintain reserves to meet industry standards.

D. Establish Internal Audit Function

1. Have Deputy Director develop monthly reports to cover PHAS and SEMAP items and provide a snapshot of agency status.
2. Revise and improve an agency performance reporting system that would compile operational and financial information into a series of monthly, quarterly and semi-annual reports that can support analysis of budgets and internal planning activities.
3. Develop file protocols for each department and program that define the data elements to be retained as part of the agency's official files. This would include whether these data elements are paper or electronic, who has right of access or ability to modify this information (which therefore include MIS security), and a procedural system for file purging and long-term retention of records. This initiative needs to be coordinated with the implementation of a central files system for the Service Center.
4. Develop capacity for random audit of program files for both Section 8 and Public Housing Programs. This refers to file pulls to review regulatory and procedural compliance of 5% to 10% of a program on an annual basis.

E. Maximize MHA income streams to support core mission to the maximum extent feasible.

1. Continue work on energy performance contracting program to maximize cost savings under PFS incentive program. Use creative finance mechanisms such as performance contracting to finance improvements "off-budget".
2. Explore and implement a tax-credit property management effort to attract contracts from other owners of tax-credit properties.
3. Create system to assess, promote and monitor residents in transition from welfare-to-work or from marginal employment to a living wage.
4. Continue expanding and refining risk management programs and staff safety training in order to mitigate and lessen insurance claims therefore leading to a reduction of insurance premiums.
5. Explore adjusting the Fair Market Rents in Missoula as set by HUD and other budget and payment standards to more correctly reflect the low supply, high demand, and rapidly increasing prices
6. Identify and develop new revenue producing businesses for the Housing Authority such as bond placement or third party property management contracts.
7. Seek public/private partnerships with community businesses and existing social service providers, to leverage MHA resources as well as increase the scope of grantsmanship.

8. Seek corporations or community groups who are interested in “adopting” a MHA development. This to provide stronger relationships between MHA residents and the Missoula community and would include recreational activities, special projects, mentoring and other programs that develop leadership skills and provide role models to MHA program participants.
9. Standardize physical plant, parts and systems to permit easy repairs and quicker response to maintenance needs.
10. Implement direct deposit payments of HAP to landlords.
11. Look into feasibility of expanding and/or moving MHA administrative offices

IV. BUILD A PROGRAM OF COMMUNITY AND EMPOWERMENT DIRECTED AT PROMOTING CLIENT MOVEMENT THROUGH THE AFFORDABLE HOUSING CONTINUUM, FROM HOMELESSNESS TO HOME OWNERSHIP.

A. Design, develop, implement, monitor and evaluate an MHA Client Services Program of Empowerment, directed at long-term housing stability, that will serve Section 8 and Public Housing (and all MHA Housing programs) and that will promote client safety, and economic and personal self-sufficiency.

1. Work with Officer Rod Swanson to develop a formal Neighborhood Safety and Empowerment Program, including children’s activities.
2. Develop formal community collaborations for a multi-disciplinary service referral network; develop formal Memorandums of Understanding with key local agencies and organizations regarding MHA client referral for service, follow-through and follow-up accountability.
3. Establish a data bank of information through Customer Satisfaction surveys, internal tracking and client information that will support access to expanded and specific additional support service financial resources.
4. Prioritize Senior Housing Services, including the development of formal Resident Groups focused on empowerment and self-sufficiency.
5. Continue to refine the Family Self Sufficiency Program to meet service goals, expanding the FSS program concepts through all MHA programs.
6. Develop a public housing FSS program with additional staff to case manage public housing resident program
7. Develop a FSS program for public housing residents directed at long-term housing stability and family self-sufficiency
8. Develop an Elder and Disabilities Support Service Program, including additional MHA staff, directed at ensuring independent quality of life.
9. Work closely with the Planning and Development Department to assure effective support service program development on all new MHA ventures, including the SRO and Veteran’s Housing.

B. Design a program of support service directed at short-term MHA Client Service housing stability requirements.

1. Work closely with all MHA departments to develop a supportive, effective and responsive back-up for day to day client issues.
2. Partner with Credit Counseling Services and other local groups to provide a regular series of financial assessment, budgeting, credit repair and financial fitness workshops for MHA clients.
3. Develop an appropriate and effective Community Service requirement response.

C. Provide an atmosphere for MHA clients to be empowered to develop and formalize Resident Organizations appropriate to Public Housing and Section 8 Voucher needs.

1. Develop and refine the Resident Advisory Board (RAB) and Family Self Sufficiency PCC processes.
2. Incorporate MHA client contribution throughout the organizational policy making processes via such vehicles as newsletters, annual events, open house, activities, etc.

V. BUILD COMMUNITY AND SELF-SUFFICIENCY THROUGH MHA PROGRAMS

A. Improve self-sufficiency efforts to help people in public housing and other programs to move towards employment and homeownership, through coordination with outside agencies, which provide services.

1. Complete initial needs assessment/perception survey.
2. Develop and implement system to track household job readiness and impediments to employment from unit or subsidy offer throughout of the residents' participation in MHA programs.
3. Develop support systems for the transition from welfare to work or from marginal employment to livable wage.
4. Design and implement Individual Savings Accounts (ISA) accounts to assist resident in saving monies that would have otherwise gone to pay rent but are exempted under HUD and MHA policies.
5. Continue to develop the Family Self-Sufficiency Program. Seek to be fully enrolled at 100 Section 8 participants and 15 Public Housing participants by fiscal year end.
6. Develop Memoranda of Agreement with supportive service providers to formalize their assistance to our residents and to provide a mechanism that would enable the development of supportive housing.

B. Utilize non-profit subsidiary to design, implement and administer all MHA social service programs. These programs are to be supportive in nature and rely on established third party entities to provide direct services.

1. Non-profit subsidiary will seek funds on MHA's behalf through grantsmanship and partnering.
2. MHA shall coordinate and facilitate delivery of community-based supportive services to its tenants with emphasis on basic life skills;
3. Non-profit subsidiary will coordinate all social service entities seeking access to MHA's developments including requests for programming space and access to residents.
4. MHA supportive service program shall distinguish between those who can attain independence from public assistance and those are likely to require more permanent housing and design and deliver services accordingly;

C. Strengthen Section 3 efforts

1. Initiate a public information program on Section 3 and its new importance for organizations that want to do business with the Authority. This public information program should be included in a larger initiative to encourage local businesses to respond to MHA procurements.
2. Develop program to provide technical assistance to Section 3 businesses.

D. Improve Lease Enforcement to Build Communities

1. Develop ongoing education programs for residents, law enforcement personnel, and judicial system on MHA lease requirements, federal regulations and the operational issues that MHA must confront to assure its residents their right to quiet and peaceful enjoyment of their housing.

2. Strictly enforce lease evictions that involve criminal activity that include, drugs, guns and violence.
3. Enhance and expand community watch initiatives (Neighborhood Watch, etc.).

E. Improve MHA's ability to intervene with at risk families

1. Formalize referral process of families falling behind in rent to appropriate resource to assist them in budgeting and other matters.
2. Increase staff capacity to recognize when social service referrals are necessary.
3. Work to strengthen tenant organizations and communication so that tenants can begin to provide support to each other.

VI. STRENGTHEN MHA'S PRESENCE IN THE MISSOULA COMMUNITY AS A LEADER ON AFFORDABLE HOUSING ISSUES

1. Develop a public relations program that provides periodic press releases and arranges for other forms of access to members of the press to make certain that MHA's turn-around activities are publicly understood.
2. Increase Commissioners' role to include periodic attendance at public forums or press briefings at which topics pertinent to their committee are presented (e.g. a press conference concerning MHA's annual modernization program or Housing Agency Plan submission).
3. Develop an agenda of legislative changes at the federal and state level that would support MHA's redevelopment.
4. Advocate for a state-level equivalent to the Low Income Housing Tax Credit. This type of initiative has already been implemented or has pending legislation in several states.
5. Coordinate with the City and County of Missoula toward a unified and consistent public housing policy.
6. Champion provision of equitable housing opportunity and development of affordable housing on behalf of those least able to advocate for themselves by actively marketing it programs to the community and advocating the housing needs of low-income persons in matters of community housing policy and land use regulation.
7. Become the local expert on housing policy and affordable housing development by providing the community with quality data on housing and housing needs, educating the community about housing issues and policy, and developing a public relations and media plan focusing on those served and in need rather than on the agency.
8. Work with the Missoula Housing Corporation, Missoula Aging Service, the District XI Human Resource Council, Neighborhood Housing Services and others to explore co-development, joint funding, homeownership, staff sharing, and cooperative arrangements with consultants.
9. Maintain and expand participation with the At-Risk Housing Coalition to find cooperative solutions to long-term homelessness and temporary housing needs.
10. Join and become active in local organizations that promote affordable housing in Missoula and Montana such as the Chamber of Commerce and Home Builders Association.
11. Become involved at the local and state levels with housing advocates to share information, training, and policies.

Streamlined Annual PHA Plan

PHA Fiscal Year 2005

[24 CFR Part 903.12(b)]

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The Missoula Housing Authority is submitting a Streamlined 5-Year and Annual Plan (50075-SF) as a small PHA and as a High Performer.

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<input checked="" type="checkbox"/>	6. Demolition and Disposition.....	41
<input checked="" type="checkbox"/>	7. Homeownership.....	42
<input checked="" type="checkbox"/>	8. Civil Rights Certifications (included with PHA Certifications of Compliance).....	44
<input checked="" type="checkbox"/>	9. Additional Information.....	45
	a. PHA Progress on Meeting 5-Year Mission and Goals	
	b. Criteria for Substantial Deviations and Significant Amendments	
	c. Other Information Requested by HUD	
	i. Resident Advisory Board Membership and Consultation Process	
	ii. Resident Membership on the PHA Governing Board	
	iii. PHA Statement of Consistency with Consolidated Plan	
	iv. (Reserved)	
<input checked="" type="checkbox"/>	10. Project-Based Voucher Program.....	53
<input checked="" type="checkbox"/>	11. Supporting Documents Available for Review.....	56
<input checked="" type="checkbox"/>	12. FY 2005 Capital Fund Program and Capital Fund Program Replacement Housing Factor, Annual Statement/Performance and Evaluation Report.....	59
<input checked="" type="checkbox"/>	13. Capital Fund Program 5-Year Action Plan.....	71
<input checked="" type="checkbox"/>	14. Other (List below, providing name for each item)	
	a. Audit	
	b. Revised Admissions and Continued Occupancy Policy	

B. SEPARATE HARD COPY SUBMISSIONS TO LOCAL HUD FIELD OFFICE

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

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

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

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

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

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

Executive Summary (optional)

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

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

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

Housing Needs of Families on the PHA's Waiting Lists as of June 2005			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" 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:			
	# of families	% of total families	Annual Turnover
Waiting list total	552		31%
Extremely low income <=30% AMI	428	78%	
Very low income (>30% but <=50% AMI)	98	18%	
Low income (>50% but <80% AMI)	21	4%	
Families with children	285	52%	
Elderly families	38	7%	
Families with Disabilities	130	24%	
White	481	87%	
African American	3	0.54%	
American Indian	57	10%	
Asian/Pacific Is./Other	11	2%	
Hispanic	27	9%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	249	45%	
2 BR	220	40%	
3 BR	51	9%	
4 BR	24	4%	
5 BR	4	0.7%	
5+ BR	N/A	N/A	
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 PHA's Waiting Lists as of June 2005

Waiting list type: (select one)

Section 8 tenant-based assistance

Public Housing

Combined Section 8 and Public Housing

Public Housing Site-Based or sub-jurisdictional waiting list (optional)

If used, identify which development/subjurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	821		16%
Extremely low income <=30% AMI	623	76%	
Very low income (>30% but <=50% AMI)	156	19%	
Low income (>50% but <80% AMI)	41	5%	
Families with children	470	57%	
Elderly families	68	8%	
Families with Disabilities	187	23%	
White	712	87%	
African American	4	0.49%	
American Indian	84	10%	
Asian/Pacific Is./Other	21	3%	
Hispanic	39	5%	

Characteristics by Bedroom Size (Public Housing Only)			
1BR	N/A	N/A	
2 BR	N/A	N/A	
3 BR	N/A	N/A	
4 BR	N/A	N/A	
5 BR	N/A	N/A	
5+ BR	N/A	N/A	

Is the waiting list closed (select one)? No Yes

If yes:

How long has it been closed (# of months)?

Does the PHA expect to reopen the list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even if generally closed? No Yes

Housing Needs of Families on the PHA's Waiting Lists as of June 2005

Waiting list type: (select one)

Shelter + Care Program

Public Housing

Combined Section 8 and Public Housing

Public Housing Site-Based or sub-jurisdictional waiting list (optional)

If used, identify which development/subjurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	30		14%
Extremely low income <=30% AMI	28	93%	
Very low income (>30% but <=50% AMI)	2	7%	
Low income (>50% but <80% AMI)			
Families with children	5	17%	
Elderly families	1	3%	
Families with Disabilities	30	100%	
White	26	87%	
African American	1	3%	
American Indian	2	7%	
Asian/Pacific Is./Other	1	3%	
Hispanic	0	0%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	N/A	N/A	
2 BR	N/A	N/A	
3 BR	N/A	N/A	
4 BR	N/A	N/A	
5 BR	N/A	N/A	
5+ BR	N/A	N/A	

Is the waiting list closed (select one)? No Yes

If yes:

How long has it been closed (# of months)?

Does the PHA expect to reopen the list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even if generally closed? No Yes

Housing Needs of Families on the PHA's Waiting Lists as of June 2005

Waiting list type: (select one)

- Uptown Single Room Occupancy Permanent Housing Project**
 Public Housing
 Combined Section 8 and Public Housing
 Public Housing Site-Based or sub-jurisdictional waiting list (optional)

If used, identify which development/subjurisdiction:

	# of families	% of total families	Annual Turnover
Waiting list total	26		
Extremely low income <=30% AMI	25	96%	
Very low income (>30% but <=50% AMI)	1	4%	
Low income (>50% but <80% AMI)			
Families with children	0		
Elderly families	2	7%	
Families with Disabilities	5	19%	
White	23	88%	
African American	3	12%	
American Indian			
Asian/Pacific Is./Other			
Hispanic			

Characteristics by Bedroom Size (Public Housing Only)

	# of families	% of total families	Annual Turnover
0 BR - SRO	26	100%	
1/2 BR	N/A	N/A	
3 BR	N/A	N/A	
4 BR	N/A	N/A	
5 BR	N/A	N/A	
5+ BR	N/A	N/A	

Is the waiting list closed (select one)? No Yes

If yes:

How long has it been closed (# of months)?

Does the PHA expect to reopen the list in the PHA Plan year? No Yes

Does the PHA permit specific categories of families onto the waiting list, even if generally closed? No Yes

B. Strategy for Addressing Needs

(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:

- 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:

- 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)

Operate Section 8 Homeownership and continue implementation of Project-Based Voucher Programs

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

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

- 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)**

Encourage participation in Family Self Sufficiency Program.

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

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

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

Encourage participation in Family Self Sufficiency Program.

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

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

Act as developer for Section 202 elderly housing projects

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

- 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)**

Use a set-aside of Section 8 for PBV that is specifically targeted to supportive service programs

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:

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

Strategy 2: Conduct activities to affirmatively further fair housing

- 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)

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

(2) Reasons for Selecting Strategies

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

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

2. Statement of Financial Resources

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

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2006 grants)		
a) Public Housing Operating Fund	\$ 312,000	
a) Public Housing Capital Fund	\$ 492,000	
a) HOPE VI Revitalization		
a) HOPE VI Demolition		
a) Annual Contributions for Section 8 Tenant-Based Assistance	\$3,940,800	
a) Resident Opportunity and Self-Sufficiency Grants		
a) Community Development Block Grant	\$0	
b) HOME	\$0	
Other Federal Grants (list below)		
Veterans Administration Per Diem	\$ 160,000	Operations VA Hsg for Homeless
Shelter Plus Care (Continuum of Care)	\$ 600,000	SPC HAP
SRO Mod Rehab Section 8	\$ 58,000	Section 8 project-based HAP
FSS Coordinator Grant	\$ 72,860	Section 8 FSS Program
2. Prior Year Federal Grants (unobligated funds only) (list below)		
2003 CAP&RHF Fund (obligated by 9/30/2005)	\$ 84,000	PH replacement/6 units
2004 CAP & RHF Fund	\$380,000	PH mod & replacement
3. Public Housing Dwelling Rental Income	\$ 350,000	PH operations
4. Other income (list below)		
SRO Rents	\$ 18,000	Section 8 Operations
4. Non-federal sources (list below)		
Non-HUD property rents	\$ 10,800	Operations
Total resources	\$6,478,460	

3. PHA Policies Governing Eligibility, Selection, and Admissions

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

The Missoula Housing Authority has revised its Admissions & Continued Occupancy Policy (ACOP). The following responses reflect the current plan, including the applicable changes. The revised ACOP is included in the review documents as part of this agency plan.

A. Public Housing

(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: Ten (10)**
 When families are within a certain time of being offered a unit: Three (3) months
 Other: (describe)

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)

Evidence of rehabilitation and mitigating circumstances

- 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?

Public Housing and Section 8 Applicants

- 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. Site-Based Waiting Lists-Previous Year

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

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

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

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

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

d. Site-Based Waiting Lists – Coming Year

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

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

2. 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?

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

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)

(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

May be retained on waiting list if unit is refused for “good cause.”

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)

Residence choice, such as moving for a job or school, neighborhood preference or ease of management.

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)**

Preference for elderly, disabled, families or single persons who have been displaced by government action over all other single family member households.

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.

Former Federal preferences:

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

Other preferences (select all that apply)

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

- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- (3) 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)**

1 Date and Time

2 Preference for elderly, disabled, families or single persons displaced by government action over all other single family member households.

1 Administrative transfer

4. Relationship of preferences to income targeting requirements:

- The PHA applies preferences within income tiers**

(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)**

MHA Tenant Handbook with information and details on MHA facilities.

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

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

(6) Deconcentration and Income Mixing

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

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

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

B. Section 8

The Missoula Housing Authority is currently revising its Section 8 Administrative Plan. The anticipated changes are procedural changes that affect the way the waiting list is administered. Therefore, the changes in the Section 8 Administrative Plan will be reviewed through public comment during the annual plan review process.

(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 – Section 8 Program only.**
- Criminal and drug-related activity, more extensively than required by law or regulation – Public Housing**
- More general screening than criminal and drug-related activity (list factors):
- Other (list below)

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

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

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

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

- Criminal or drug-related activity
- Other (describe below)**

Participant's landlord history under the program. Release of criminal or drug related activity, if requested and if authorized by participant.

(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:

- 1. Documented medical reasons or other mitigating circumstances.**
- 2. Family qualifies for 4-bedroom unit or larger.**
- 3. As a reasonable accommodation for a disability.**
- 4. If Request for Tenancy Approval is awaiting upgrade to meet HQS and Local Sanitary Code Standards. Participant search period is extended to find another unit, if unit ultimately fails.**

(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)

MHA is changing admissions policies to allow applicants up to 80% of median income as allowed by regulation, and removing the singles preference so that all applicants will be housed in order of date and time of application and according to income tiering to meet targeting regulations.

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)

- 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)**

1 Administrative transfer

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

(5) Special Purpose Section 8 Assistance Programs

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

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

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

- Through published notices**
 Other (list below)

Through outreach to specific non-profit groups that assist persons with disabilities, and agencies who assist families with self-sufficiency goals.

4. PHA Rent Determination Policies

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

A. Public Housing

(1) Income Based Rent Policies

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

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

b. Minimum Rent

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

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

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

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

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

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

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

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

- For the earned income of a previously unemployed household member
- For increases in earned income
- Fixed amount (other than general rent-setting policy)
If yes, state amount/s and circumstances below:
- Fixed percentage (other than general rent-setting policy)
If yes, state percentage/s and circumstances below:

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

e. Ceiling rents

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

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

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

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

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

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

f. Rent re-determinations:

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

- Never
- At family option
- Any time the family experiences an income increase**

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

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

(2) Flat Rents

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

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

Rent rate analysis performed by local appraisal firm under contract to MHA.

B. Section 8 Tenant-Based Assistance

(1) Payment Standards

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

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

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

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

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

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

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

- Annually**
 Other (list below)

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

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

(2) Minimum Rent

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

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

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

5. Capital Improvement Needs

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

A. Capital Fund Activities

(1) Capital Fund Program

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

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

(1) Hope VI Revitalization

- a. Yes No: Has the PHA received a HOPE VI revitalization grant? (if no, skip to next component; if yes, provide responses to questions on chart below for each grant, copying and completing as many times as necessary)
- b. Status of HOPE VI revitalization grant (complete one set of questions for each grant)
Development name:
Development (project) number:
Status of grant: (select the statement that best describes the current status)
 Revitalization Plan under development
 Revitalization Plan submitted, pending approval
 Revitalization Plan approved
 Activities pursuant to an approved Revitalization Plan underway
- c. Yes No: Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year? If yes, list development name/s below:
- d. Yes No: Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year? If yes, list developments or activities below:

e. Yes No: Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement? If yes, list developments or activities below:

Thirty-six units total of Public Housing remain available for replacement. MHA received HUD approval to construct 6 units of Replacement Public Housing through the Replacement Housing Fund. MHA may seek to replace the remaining thirty-six units.

6. Demolition and Disposition

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

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

Demolition/Disposition Activity Description	
1a. Development name:	Undetermined
1b. Development (project) number:	
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>07/2006</u>
5. Number of units affected:	Undetermined
6. Coverage of action (select one)	<input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity:	a. Actual or projected start date of activity: 02/2007 b. Projected end date of activity: 08/2007

MHA staff has been directed by the Board of Commissioners to examine the feasibility of another round of public housing disposition.

7. Section 8 Tenant Based Assistance--Section 8(y) Homeownership Program

[24 CFR Part 903.12(b), 903.7(k)(1)(i)]

- (1) Yes No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982 ? (If “No”, skip to the next component; if “yes”, complete each program description below (copy and complete questions for each program identified.)

(2) Program Description

The MHA in cooperation with the Missoula Housing Corporation, Women’s Opportunity & Resource Development, Inc. (WORD), District XI Human Resource Development Council, and Neighborhood Housing Services of Great Falls, continues to operate a Section 8 Homeownership Voucher Program. Eligible Section 8 participants are offered the opportunity to participate in a First Time Homeowners Program. Preference is given to participants who are under contract in the MHA’s Family Self-Sufficiency Program.

WORD is a fully approved HUD Counseling Agency in good standing.

a. Size of Program

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

If the answer to the question above was yes, what is the maximum number of participants this fiscal year? **30 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:

Family must be a qualified existing program participant who has been receiving housing assistance from MHA for a minimum of one year, and who has successfully complied with all rental program and lease requirements during that time. No debt may be owing to MHA or any other housing authority.

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

Program has been implemented since 2002. Currently seven (8) families have purchased homes with homeownership vouchers.

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

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

- a. Establishing a minimum homeowner downpayment requirement of at least 3 percent of purchase price and requiring that at least 1 percent of the purchase price comes from the family's resources.
- b. Requiring that financing for purchase of a home under its Section 8 homeownership will be provided, insured or guaranteed by the state or Federal government; comply with secondary mortgage market underwriting requirements; or comply with generally accepted private sector underwriting standards.
- c. Partnering with a qualified agency or agencies to administer the program (list name(s) and years of experience below).
- d. Demonstrating that it has other relevant experience (list experience below).

The Missoula Housing Authority and Western Montana Mental Health Clinic created Garden City CHDO to develop the award winning, 36-unit condominium project. The housing project serves first time low-income homebuyers, and 20% of the homebuyers served have a mental disability.

8. Civil Rights Certifications

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

Civil rights certifications are included in the *PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations: Board Resolution to Accompany the Streamlined Five-Year/Annual Plans*, which is submitted to the Field Office in hard copy—see Table of Contents.

9. Additional Information

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

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

Public Housing

The Missoula Housing Authority has revised its Admissions & Continued Occupancy Policy (ACOP). The revised ACOP is included in the review documents as part of this agency plan. Changes in the document removed sections which addressed procedures rather than policies, and changed language and flow of information to be more reader-friendly. In addition, policy changes were incorporated which include limiting the number of times a family member may re-enter the household after move out, requiring residents on fixed incomes such as SSI and SS to recertify only once per year at the time of annual recertification; and reducing from 30 to 20 the number of hours per week of work or school required to exempt the person from community service. The preference section was also revised to better reflect HUD's guidance on income tiers as preferences, although there is no change in the way the waiting list policy is administered.

MHA has continued to advertise and contract for open purchase contracts for painting, plumbing, unit preparations, lawn care, heating, electrical, legal, security, carpet installation, and other services.

MHA continues to use Physical Needs Assessment and Accessibility studies used to assess priorities, timeliness, cost projections and set capital budget priorities.

Section 8

This plan incorporates changes to the administration of the Section 8 waiting list as follows: 1) the waiting list will be open to applicants up to 80% median income, as allowed by regulation. 2) The singles preference is removed so that all applicants will be housed in order by date and time of application and by income tiers to meet income targeting requirements.

Of the 150 Tenant Based Vouchers MHA has been approved to designate as Project Based Vouchers (PBV), MHA has approved 32 PBV in 4 different housing projects. MHA intends to advertise to the public the use of the remaining allowed PBV to both deconcentrate poverty and ensure affordable housing units throughout the community.

Development

The **Uptown** Apartments (Single Room Occupancy) renovation was completed in January 2005 and fully leased up by the end of February. MHA staff continues to assess this housing for single homeless individuals to ensure project compliance and responsible tenancy. This permanent housing project is the first of it's kind in Montana, has received great public support, and has become an example of how to incorporate public art with subsidized housing in urban areas.

Construction is near completion on the first housing for **homeless veterans** in Montana. This long term transitional housing project will be complete in August 2005 with lease up projected in September. This will provide 17, one-bedroom units and associated support services for homeless U.S. veterans.

Missoula Housing Authority's Replacement Housing Fund application for the 9th Street project has been approved. MHA intends to go out to bid for the six units of **replacement public housing** in June/July and begin construction in August/September 2005. MHA teamed up with the neighborhood council to submit a Neighborhood Grant offered by the City of Missoula to help build a bridge over an irrigation canal on 9th Street. MHA was awarded \$3000 towards the construction of the bridge, contingent on the neighborhood securing other funding.

Leased up three units renovated from MHA's prior office space located at elderly/disabled **public housing** project.

MHA is serving as the developer for **Maclay Commons**, which will house the Joseph Residence Program, run by the Poverello Center. The Joseph Residence is long-term transitional housing for homeless families. Construction of the 16 units has commenced as of May 20, 2005 and lease-up is projected in Jan/Feb 2006.

MHA's non-profit subsidiary, **Intermountain Development Company**, continues to develop the master plan, special zoning district, negotiate with prospective developers and conduct neighborhood outreach for the 12 acre infill site located in the center of Missoula.

The Missoula Housing Authority is serving as the development consultant for a Section 202 project awarded to the Missoula Housing Corporation. This 202 project will result in 40, one-bedroom units for seniors 62 years of age and over, whom are 50% Area Median Income or less. There will also be a two bedroom manager's unit. The project, **Glengarra Place**, is owned by the single purpose entity, Kilkenny Corporation, which is striving to close the project with HUD in a record 14 months. If current planning projections go as planned, construction on these units could start in January 2006.

Shelter Plus Care

As part of the State of Montana Continuum of Care coalition, the Missoula Housing Authority applied for and was awarded 26 new Shelter Plus Care vouchers for homeless, disabled clientele. MHA also applied for the renewal of existing 70 Shelter Plus Care vouchers and was awarded. This totals 96 vouchers for the project – the largest in the State.

Client Services

MHA's client service department has worked with partnering agencies to develop memoranda of understanding to help stabilize residents in the housing. In addition, the client service department has established an ad hoc group of non-profit housing

advocates, service agencies and for profit property management companies to work through issues that can jeopardize tenants housing.

Partnership

In agreement with the North Missoula Community Development Corporation (NMCDC), MHA purchased river front in-fill lots to hold the land while the NMCDC raised funds for the eventual purchase of the land. NMCDC has purchased the lots and is constructing a land trust homeownership project that will have some market rate, but mostly 80% AMI homeownership.

MHA's subsidiary non-profit, Garden City Neighbors, Inc., has subdivided 2.13 acres in the Emma Davidson/River Road Neighborhood to create four (4) lots. The subdivision was created to sell three of the four parcels to the City Parks and Recreation Department for a neighborhood park and the other lot (which has a 3 bedroom single family home) will be sold as market rate. Two of the three "City" lots will be sold to the City in July 2005 and the third in September 2006.

Habitat for Humanity has approached the Missoula Housing Authority to purchase 3 lots in a new single family home subdivision and hold the land while Habitat raised funds for their homeownership project. MHA intends to purchase the land with a buy-back from Habitat in September 2006.

MHA awarded PBV to the following community agencies: three vouchers awarded to homeWORD for the Gold Dust, an existing LIHTC family housing project. Seven vouchers to homeWORD's Orchard Gardens project, new construction of 32 LIHTC funded units. Six vouchers to the YWCA of Missoula for use in their duplex housing targeted to survivors of domestic violence. Lastly, MHA awarded 16 vouchers to Garden City Neighbors, Inc., for the Maclay Commons project. This is 16 units of new construction using LIHTC and other funds to build eight duplexes of affordable housing for families facing homelessness.

Strategic Planning

The Board of Commissioners held a strategic planning session on May 18, 2005 to assess goals to date and strategize on directions of the agency for the future. The goals they've set for the agency are included in the goals section of this plan.

These goals will set the work plan and priority for staff over the next three to five years.

Staff Capacity

MHA continues to train existing and new staff on applicable subjects. Examples include rent calculation, inspection services, LIHTC compliance, boiler maintenance, cultural competency, RIM, fair housing design, property management, financial feasibility, property development and other technical trainings where needed.

B. Criteria for Substantial Deviations and Significant Amendments

(1) Amendment and Deviation Definitions

24 CFR Part 903.7(r)

a. Substantial Deviation from the 5-Year Plan

The Missoula Housing Authority hereby defines substantial deviation and significant amendment or modification as any change in policy, which significantly and substantially alters the Authority's stated mission and the persons the Authority serves. This would include admissions preferences, demolition or disposition activities and conversion programs. Discretionary or administrative amendments consonant with the Authority's stated overall mission and basic objectives will not be considered substantial deviations or significant modifications.

Any policy changes or funding priorities as a result of future actions by HUD will not be considered significant amendments and/or substantial deviations from the plan.

b. Significant Amendment or Modification to the Annual Plan

The Missoula Housing Authority hereby defines substantial deviation and significant amendment or modification as any change in policy, which significantly and substantially alters the Authority's stated mission and the persons the Authority serves. This would include admissions preferences, demolition or disposition activities and conversion programs. Discretionary or administrative amendments consonant with the Authority's stated overall mission and basic objectives will not be considered substantial deviations or significant modifications.

Any policy changes or funding priorities as a result of future actions by HUD will not be considered significant amendments and/or substantial deviations from the plan.

C. Other Information

[24 CFR Part 903.13, 903.15]

(1) Resident Advisory Board Recommendations

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

If yes, provide the comments below:

RAB recommended that the singles preference be retained for Public Housing waiting list, but eliminated for Section 8 Voucher waiting list.

RAB recommended that Section 8 Program be open to applicants up to 80% of median income as allowed by regulations.

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

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

The PHA changed portions of the PHA Plan in response to comments
List changes below:

Singles preference retained for Public Housing waiting list.

Singles preference eliminated for Section 8 Voucher waiting list.

Section 8 Voucher waiting list opened to applicants up to 80% of median income as allowed by regulation.

Other: (list below)

(2) Resident Membership on PHA Governing Board

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

Yes No:

If yes, complete the following:

Name of Resident Members of the PHA Governing Board:

Peggy Jacobson

Chuck Hossfeld

Method of Selection:

Appointment

The term of appointment is (include the date term expires):

Peggy Jacobson: 08/15/1995 – 06/25/2006

Chuck Hossfeld: 06/26/2003 – 06/25/2007>(* Approved for re-appointment)

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

Description of Resident Election Process

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

Candidates were nominated by resident and assisted family organizations

Candidates could be nominated by any adult recipient of PHA assistance

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

- ballot
- Other: (describe)

Eligible candidates: (select one)

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

Eligible voters: (select all that apply)

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

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

- The PHA is located in a State that requires the members of a governing board to be salaried and serve on a full time basis
- The PHA has less than 300 public housing units, has provided reasonable notice to the resident advisory board of the opportunity to serve on the governing board, and has not been notified by any resident of their interest to participate in the Board.
- Other (explain):

Date of next term expiration of a governing board member: **06/25/2005 – Chuck Hossfeld. Applied and has been re-appointed for additional two year term (6/25/2007).**

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

Missoula Mayor Mike Kadas

(3) PHA Statement of Consistency with the Consolidated Plan

[24 CFR Part 903.15]

Consolidated Plan jurisdiction: City of Missoula, MT

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

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

- The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.**
- The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
- Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)**
- Other: (list below)**

Assist homeless by increasing and/or expanding availability of emergency shelter facilities, transitional and permanent housing opportunities, and supportive services and prevention programs, and place greater emphasis on providing permanent housing as soon as possible for homeless individuals and families.

Increase and preserve the supply of affordable rental units for low and moderate-income households, including special needs persons, to include acquisition, rehabilitation and new construction.

Increase and preserve affordable homeownership for low and moderate income households, including special needs persons.

Further investigate and develop an action plan to address community-wide barriers to affordable housing and barriers to fair housing compliance.

Increase accessibility in compliance with ADA requirements.

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

(4) (Reserved)

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

10. 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:)**

Over the years 0f 1999 – 2003, Missoula's average vacancy rate has stood at less than 1% as contrasted to a desired rate of 6%. This has led to tremendous demand for apartments and the market pricing of units, which normally would be for extremely low income persons, well beyond their ability to pay. During that same time, building permits have not kept pace with estimated demand - - Missoula's Consolidated Plan for that period called for a minimum of 770 units per year or a total of 3,850. However, that period saw permits being issued for only 1,854 multi-family units. Compounding that problem is the fact that of those 1,854 units built, only 20 (or about 1%) are estimated to be priced for extremely low income, or 30% of Area Median Income (AMI). At the same time, MHA's waiting list for that income group has grown from 543 (approximately 2 year wait) to 623, an increase of over 30%. Simply put, there are insufficient units in the market to provide competitive rental rates for Section 8 tenant based units - - the Section 8 tenant based vouchers are used but at rental rates that are inflated due to the lack of units. By project basing units, MHA can both encourage new construction and preserve existing units which serve 30% AMI. Project basing also allows developers to specialize housing projects for special needs populations. Often these developments can address the specific and often sensitive issues that these populations face in becoming self-sufficient. These developments can be permanent or transitional (transitional in terms of maximum occupancy of two (2) years but minimum lease period of six months). Examples of transitional housing (with associated social services) for special needs populations include: homeless family housing, domestic violence, homeless veterans, and households graduating from chemical dependency treatment.

MHA’s plan has already been approved by HUD to allocate 20% of its 754 tenant based vouchers to project based vouchers (approximately 150). MHA will coordinate an open competition for developers and service providers to submit proposals for award of a PBV contract for up to 10 years or longer depending upon the type of project, the status of regulations, and upon appropriation by Congress. As part of the contract, MHA will administer the vouchers and manage site-based waiting lists specific to the special needs population of the development.

By MHA utilizing site-based waiting lists, MHA and the affordable housing provider can work together to draw applicants who may be specifically interested in the site or benefit from the program being run at the site. Examples of an appropriate sorting system(s) include: sorting by income tiers, Board approved preferences, special needs, and sorting by ranking.

All applicants will be given the opportunity to be included on any of the Missoula Housing Authority program waiting lists if they meet the program's eligibility requirements. It is expected that site-specific waiting lists will have criteria specific to the population, and therefore each site-based waiting list will be independent of one another. Residents will be selected on a "first-come first-serve" basis. To be added to the waiting list(s), an applicant must provide initial application information to prove their eligibility for the program. Their eligibility status and income level will be verified at the time they reach the top of the waiting list.

All units assisted will meet or exceed housing quality standards as set forth by HUD. All project-based vouchers will be under guidance of MHA's Section 8 Administration policy.

If a family moves out of its project-based unit at any time after the first year of assisted occupancy, the Missoula Housing Authority (MHA) will offer the family available tenant-based rental assistance. MHA will provide the family a voucher from the tenant-based section 8 voucher program. If a voucher is not available when the family is ready to move, MHA will give that family priority to receive the next available tenant-based voucher.

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

MHA previously advertised for up to 35 vouchers in new and existing categories. Those have been approved according to MHA's application criteria and HUD's review of the new construction applications for Site & Neighborhood Standards 24 CFR 983.6:

- 3 vouchers for existing, family housing = homeWORD Gold Dust LIHTC housing.**
- 3 vouchers for new housing for families leaving transitional alcohol/drug treatment facilities (requiring a supportive service plan to continue the treatment of those families) = MHA received no applicants.**
- 6 vouchers for existing housing for victims of domestic violence (requiring a supportive service plan to continue the treatment of those families) = YWCA of Missoula, 6 units.**
- 23 vouchers for new, family housing = Maclay Commons, new construction of 16 units in 8 duplexes for families facing homelessness and Orchard Gardens, homeWORD's new construction LIHTC project. Of 35 units, 7 will be assisted with PBV.**

It is projected that over the course of the next federal fiscal year (FY 2006), the remaining

118 vouchers could be advertised and contracted to new and existing units. The populations that will benefit from the potential up-coming project based-vouchers are low-income, elderly, disabled and special needs populations.

The general location of the vouchers will be dispersed throughout the City of Missoula. Under current regulations, census tracts that have less than 20% poverty rate will be approved as eligible. Census tracts that have between 20 – 30% poverty rate will be considered, understanding that approval of such census tracts would require a waiver from HUD. Census tracts over 30% are not permitted by current regulation and therefore will not be considered. One of the critical considerations in awarding PBV in those 20-30% census tracts is the location of the project in relation to the true concentration of poverty. A heavy concentration of college students (many supported by grants, loans, and family income which is not counted as income) occupy units in those census tracts with poverty rates over 20%. Using income data and poverty information for students collected by the University of Montana, MHA backed out the number of college students under poverty level in each of the affected census tracts to end up with overall poverty rates less than 20%. MHA would use the same methodology when analyzing a project in a waiver eligible census tract. Using that approach, MHA recently requested and received waivers for three (3) projects in census tracts with poverty rates between 20-30% but whose rates fell below 20% once the university students were eliminated from the population pool. MHA would also determine whether the immediate neighborhood surrounding the proposal has a concentration of poverty before applying for the necessary waiver.

If the proposed PBV rules as published for comments this year become final, MHA will adjust its PBV program to meet the standards set in those new rules. Those new rules would permit the use of PBV in neighborhoods where there is a greater than 20% poverty rate based upon the same analysis of the immediate neighborhood outlined above.

Of the 17 neighborhoods in Missoula, all but 5 have significant rental populations. Those 5 lie on the extreme outskirts of town, have the highest percentage of home ownership, limited public transportation, and nearly no-nonresidential uses such as stores or offices for supportive services. MHA anticipates that a majority of its tenant and project based voucher holders will live in the other 12 neighborhoods that comprise an area that is roughly 4 miles by 4 miles in size. It is anticipated that over 90% of the project based vouchers will be awarded to projects in that 12 neighborhood area; MHA's current projects are in only 4 of those 12 neighborhoods. In addition to the goal of poverty deconcentration explained above, another goal is to scatter the units through those 12 of the City's neighborhoods, targeting first (but not necessarily limiting) the 8 neighborhoods where MHA has few or no units, to deconcentrate poverty.

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

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

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
X	<i>PHA Certifications of Compliance with the PHA Plans and Related Regulations and Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans.</i>	Standard 5 Year and Annual Plans; streamlined 5 Year Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan.	5 Year Plans
X	Fair Housing Documentation Supporting Fair Housing Certifications: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans
X	Housing Needs Statement of the Consolidated Plan for the jurisdiction(s) in which the PHA is located and any additional backup data to support statement of housing needs for families on the PHA’s public housing and Section 8 tenant-based waiting lists.	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O/ACOP), which includes the Tenant Selection and Assignment Plan [TSAP] and the Site-Based Waiting List Procedure.	Annual Plan: Eligibility, Selection, and Admissions Policies
N/A	Any policy governing occupancy of Police Officers and Over-Income Tenants in Public Housing. <input type="checkbox"/> Check here if included in the public housing A&O Policy.	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the method for setting public housing flat rents. <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development. <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 (if included in plan, not necessary as a supporting document) and written analysis of Section 8 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). MHA Safety Plan.	Annual Plan: Operations and Maintenance
X	Results of latest Public Housing Assessment System (PHAS) Assessment (or other applicable assessment).	Annual Plan: Management and Operations
N/A	Follow-up Plan to Results of the PHAS Resident Satisfaction Survey (if necessary)	Annual Plan: Operations and Maintenance and Community Service & Self-Sufficiency
X	Results of latest Section 8 Management Assessment System (SEMAP)	Annual Plan: Management and Operations
X	Any policies governing any Section 8 special housing types <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Operations and Maintenance

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
N/A	Consortium agreement(s).	Annual Plan: Agency Identification and Operations/ Management
X	Public housing grievance procedures <input 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 Capital Fund/Comprehensive Grant Program Annual Statement /Performance and Evaluation Report for any active grant year.	Annual Plan: Capital Needs
N/A	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grants.	Annual Plan: Capital Needs
N/A	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	Self-evaluation, Needs Assessment and Transition Plan required by regulations implementing Section 504 of the Rehabilitation Act and the Americans with Disabilities Act. See PIH Notice 99-52 (HA).	Annual Plan: Capital Needs
N/A	Approved or submitted applications for demolition and/or disposition of public housing.	Annual Plan: Demolition and Disposition
N/A	Approved or submitted applications for designation of public housing (Designated Housing Plans).	Annual Plan: Designation of Public Housing
N/A	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act, Section 22 of the US Housing Act of 1937, or Section 33 of the US Housing Act of 1937.	Annual Plan: Conversion of Public Housing
N/A	Documentation for required Initial Assessment and any additional information required by HUD for Voluntary Conversion.	Annual Plan: Voluntary Conversion of Public Housing
N/A	Approved or submitted public housing homeownership programs/plans.	Annual Plan: Homeownership
X	Policies governing any Section 8 Homeownership program (<u>Section 20 Special Housing Types, G. Homeownership Option</u> of the Section 8 Administrative Plan)	Annual Plan: Homeownership
X	Public Housing Community Service Policy/Programs <input checked="" type="checkbox"/> Check here if included in Public Housing A & O Policy	Annual Plan: Community Service & Self-Sufficiency
X	Cooperative agreement between the PHA and the TANF agency and between the PHA and local employment and training service agencies.	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan(s) for public housing and/or Section 8.	Annual Plan: Community Service & Self-Sufficiency
X	Section 3 documentation required by 24 CFR Part 135, Subpart E for public housing.	Annual Plan: Community Service & Self-Sufficiency
N/A	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports for public housing.	Annual Plan: Community Service & Self-Sufficiency
X	Policy on Ownership of Pets in Public Housing Family Developments (as required by regulation at 24 CFR Part 960, Subpart G). <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Pet Policy
X	The results of the most recent fiscal year audit of the PHA conducted under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings.	Annual Plan: Annual Audit
N/A	Consortium agreement(s), if a consortium administers PHA programs.	Joint PHA Plan for Consortia
N/A	Consortia Joint PHA Plans ONLY: Certification that consortium agreement is in compliance with 24 CFR Part 943 pursuant to an opinion of counsel on file and available for inspection	Joint PHA Plan for Consortia

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Related Plan Component
N/A	Other supporting documents (optional). List individually.	(Specify as needed)

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

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

13. Capital Fund Program Five-Year Action Plan

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

13. Capital Fund Program Five-Year Action Plan

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

