

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

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# HOUSING AUTHORITY OF THE CITY OF TACOMA

5 Year Plan for Fiscal Years 2000 - 2004  
Annual Plan for Fiscal Year 2002

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

**PHA Plan  
Agency Identification**

**PHA Name:** HOUSING AUTHORITY OF THE CITY OF TACOMA

**PHA Number:** WA005

**PHA Fiscal Year Beginning: (mm/yyyy)** JULY 2002

**Public Access to Information**

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

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

**Display Locations For PHA Plans and Supporting Documents**

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

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

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

- Main business office of the PHA
- PHA development management offices
- Other

**5-YEAR PLAN**  
**PHA FISCAL YEARS 2000 - 2004**  
[24 CFR Part 903.5]

**A. Mission**

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

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

**B. Goals**

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

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

- PHA Goal: Expand the supply of assisted housing  
Objectives:
- Apply for additional rental vouchers:
  - Reduce public housing vacancies:
  - Leverage private or other public funds to create additional housing opportunities:
  - Acquire or build units or developments
  - Other (list below)

**1. Purchase or otherwise maintain Section 8 Project-based developments**

- PHA Goal: Improve the quality of assisted housing  
Objectives:
- Improve public housing management: (PHAS score)
  - Improve voucher management: (SEMAP score)
  - Increase customer satisfaction:
  - Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections)
  - Renovate or modernize public housing units:

- Demolish or dispose of obsolete public housing:
- Provide replacement public housing:
- Provide replacement vouchers:
- Other: (list below)

PHA Goal: Increase assisted housing choices

Objectives:

- Provide voucher mobility counseling:
- Conduct outreach efforts to potential voucher landlords
- Increase voucher payment standards
- Implement voucher homeownership program:
- Implement public housing or other homeownership programs:
- Implement public housing site-based waiting lists:
- Convert public housing to vouchers:
- Other: (list below)

**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)**

**Annual PHA Plan**  
**PHA Fiscal Year 2002**  
[24 CFR Part 903.7]

**i. Annual Plan Type:**

Select which type of Annual Plan the PHA will submit.

**Standard Plan**

**Streamlined Plan:**

- High Performing PHA**
- Small Agency (<250 Public Housing Units)**
- Administering Section 8 Only**

**Troubled Agency Plan**

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

[24 CFR Part 903.7 9 (r)]

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

**This Annual Plan has been developed in collaboration with Tacoma Housing Authority (THA) residents and staff, City of Tacoma staff and service agency representatives. THA identifies many changes it proposes to implement in compliance with The Quality Housing and Work Responsibility Act of 1998 (QHWRA). Development of long range goals and objectives (Five Year Plan) and this Annual Plan are in conformance with QHWRA.**

For many years legislation has mandated that housing authorities across the nation serve the poorest of poor families; certainly a noble concept, for if not housing authorities, who would meet the permanent housing needs of poor families? Federal preferences changed the face of housing authorities and increased the need for more operating subsidies from HUD during a period when HUD was beginning to reduce federal operating subsidies to housing authorities. QHWRA is about serving a mix of low-income families who, if able, are working, preparing to work, attending school or otherwise striving for economic independence and self-sufficiency. If successful, with increased rents from families served, HUD may be able to reduce its subsidies to housing authorities. This allows housing authorities, through their programs, to support other national programs which encourage self-sufficiency, rather than dependence.

**This 2002 Annual Plan proposes several changes such as developing public and private partnerships.**

**THA's proposed Capital Improvements are itemized and proposed demolition and disposition activities are described. We are committed to making every possible effort in achieving no net loss of units while recognizing that some demolition may be necessary.**

**THA does not propose designating any of its housing for “elderly only” or “disabled only” families.**

**The Housing Authority will implement a Volunteer Community Service Program at our Salishan HOPE VI site pursuant to current regulations. The Program, as designed by HUD would require certain adult residents to volunteer community service eight (8) hours each month or participate in an economic self sufficiency program. THA recognizes administration of the Program will be burdensome to THA without any financial consideration from HUD.**

**In an effort to support working families, the Housing Authority proposes phasing in rent increases over a two year period for certain eligible families. THA also proposes to set its minimum rents at \$0 for both its Public Housing and Section 8 programs.**

**We look forward to achieving greatness!**

**iii. Annual Plan Table of Contents**

[24 CFR Part 903.7 9 (r)]

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

**Table of Contents**

	<u>Page #</u>
<b>Annual Plan</b>	
i. Executive Summary .....	1
ii. Table of Contents .....	2
1. Housing Needs .....	6
2. Financial Resources .....	13
3. Policies on Eligibility, Selection and Admissions .....	14
4. Rent Determination Policies .....	24
5. Operations and Management Policies .....	28
6. Grievance Procedures .....	30
7. Capital Improvement Needs .....	31
8. Demolition and Disposition .....	33
9. Designation of Housing .....	36
10. Conversions of Public Housing .....	37
11. Homeownership .....	38
12. Community Service Programs .....	40
13. Crime and Safety .....	43
14. Pets (Inactive for January 1 PHAs) .....	45
15. Civil Rights Certifications (included with PHA Plan Certifications) ...	45
16. Audit .....	45
17. Asset Management .....	45
18. Other Information .....	48
Attachments.....	49

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

**Required Attachments:**

- A. Admissions Policy for Deconcentration (WA005a01)
- B. FY 2002 Capital Fund Program Annual Statement (WA005b01)
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

**Optional Attachments:**

- PHA Management Organizational Chart
- FY 2002 Capital Fund Program 5 Year Action Plan (WA005c01)
- C. Public Housing Drug Elimination Program (PHDEP) Plan
- D. Comments of Resident Advisory Board or Boards (must be attached if not Included in PHA Plan text) (WA005d01)
- Other (List below, providing each attachment name)  
Pet Policy (WA005e01)

**Supporting Documents Available for Review**

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

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	5 Year and Annual Plans
X	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies



**List of Supporting Documents Available for Review**

<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <input type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
X	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
X	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
X	The most recent Public Housing Drug Elimination Program (PHDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

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

[24 CFR Part 903.7 9 (a)]

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

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

<b>Housing Needs of Families in the Jurisdiction</b>							
<b>By Family Type</b>							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	8,137	5	5	5	5	5	5
Income >30% but <=50% of AMI	5,913	5	4	5	5	5	5
Income >50% but <80% of AMI	6,379	3	2	4	3	3	4
Elderly	4,646	4	4	4+	4	3+	3
Families with Disabilities	N/A	5	3	4	5	4	5
Race/Ethnicity White households	77%	5	5	4	5	4	5
Race/Ethnicity Black households	11%	5	4	4	5	4	5
Race/Ethnicity Asian households	7%	4	3	5	5	5	5
Race/Ethnicity –Native American households	2%	5	4	4	5	4	5

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

- Consolidated Plan of the Jurisdiction/s  
Indicate year: **2000**
- U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") dataset
- American Housing Survey data  
Indicate year:
- Other housing market study  
Indicate year:
- Other sources: (list and indicate year of information)

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

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

<b>Housing Needs of Families on the Waiting List</b>			
Waiting list type: (select one) (as of 12/31/2001)			
<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	520	100%	90%
Extremely low income <=30% AMI	403	78%	N/A
Very low income (>30% but <=50% AMI)	99	19%	N/A
Low income (>50% but <80% AMI)	16	3%	N/A
Families with children	318	61 %	N/A
Elderly families	27	5%	N/A
Families with Disabilities	142	27 %	N/A
Race/ethnicity-White	293	56 %	N/A
Race/ethnicity-Black	131	25 %	N/A
Race/ethnicity-Asian	73	14 %	N/A
Race/ethnicity-N.Amer.	11	2 %	N/A
Characteristics by Bedroom Size (Public Housing Only)			
1BR	137		
2 BR	225		
3 BR	52		
4 BR	35		
5 BR	6		
5+ BR	0		
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? N/A			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			

<b>Housing Needs of Families on the Waiting List</b>
--

<b>Housing Needs of Families on the Waiting List</b>			
Waiting list type: (select one) (as of 12/31/2001)			
<input checked="" type="checkbox"/>	Section 8 tenant-based assistance		
<input type="checkbox"/>	Public Housing		
<input type="checkbox"/>	Combined Section 8 and Public Housing		
<input type="checkbox"/>	Public Housing Site-Based or sub-jurisdictional waiting list (optional)		
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	1641	100%	12%
Extremely low income <=30% AMI	1411	86%	N/A
Very low income (>30% but <=50% AMI)	202	12%	N/A
Low income (>50% but <80% AMI)	26	2%	N/A
Families with children	1024	62%	N/A
Elderly families	143	8%	N/A
Families with Disabilities	473	28%	N/A
Race/ethnicity-White	895	54%	N/A
Race/ethnicity-Black	559	34 %	N/A
Race/ethnicity-Asian	109	6%	N/A
Race/ethnicity-N.Amer.	78	5%	N/A
Race/ethnicity-Other		%	N/A
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			
If yes:			
How long has it been closed (# of months)? 1 Month			
Does the PHA expect to reopen the list in the PHA Plan year? Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes			

### C. Strategy for Addressing Needs

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

The agency is using diversity in its approach to addressing housing needs of the community and specifically on its waiting list. Extensive effort has been initiated to assure the best possible use of its Section 8 tenant based program, including plans to project base up to 20% of its inventory, primarily to non-profits providing housing and related services within the community. The HOPE VI program will allow for a net increase of affordable housing. A No Net Loss Agreement has been entered into with residents of the Hillside Terrace Development where some demolition and disposition is occurring. A Committee has been formed to help mitigate impacts from Section 8 Project base Opt-Outs. The Committee is comprised of City of Tacoma, HUD, THA, Low-Income Housing Coalition, etc.

**(1) Strategies**

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

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

Select all that apply

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

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

Select all that apply

- Apply for additional section 8 units should they become available

- Leverage affordable housing resources in the community through the creation of mixed - finance housing
- Pursue housing resources other than public housing or Section 8 tenant-based assistance.
- Other: (list below)

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

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select all that apply

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

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

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

Select if applicable

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

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

Select all that apply

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

**Operate five miles outside of City limits of Tacoma**

**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 903.7 9 (b)]

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan year.

Note: the table assumes that Federal public housing or tenant based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2001 grants)</b>		
a) Public Housing Operating Fund	2,749,433	
b) Public Housing Capital Fund	4,390,131	
c) HOPE VI Revitalization	35,000,000	
d) HOPE VI Demolition	601,656	
e) Annual Contributions for Section 8 Tenant-Based Assistance	17,860,265	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	363,000	
g) Resident Opportunity and Self-Sufficiency Grants	999,000	
h) Community Development Block Grant	350,000	PH Cap. Improve.
i) HOME		
Other Federal Grants (list below)		
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
CGP 709/101/101R	5,572,584	PH Cap. Improve.
<b>3. Public Housing Dwelling Rental Income</b>	3,756,864	Operations
<b>4. Other income (list below)</b>	292,410	Operations
<b>5. Non-federal sources (list below)</b>		
Department of Ecology/THA	50,000	PH Cap. Improve.
WA State Housing Trust Fund	285,000	PH Cap. Improve.
WA State Bond Cap	2,500,000	PH Cap. Improve.
Private Equity from Tax Credits	2,400,000	PH Cap. Improve.
<b>Total resources</b>	<b>\$77,170,343</b>	

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

[24 CFR Part 903.7 9 (c)]

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

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

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

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

When families are within a certain number of being offered a unit: (state number)

- When families are within a certain time of being offered a unit: (state time)  
**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)      **Credit History**

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

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

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

**(2)Waiting List Organization**

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

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

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

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

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

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

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

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
- Overhoused
- Underhoused
- Medical justification
- Administrative reasons determined by the PHA (e.g., to permit modernization work)
- Resident choice: (state circumstances below)
- Other: (list below)

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)

**Fire Victims**  
**Witness Relocation**

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

\_\_\_ Date and Time

Former Federal preferences:

- 1 Involuntary Displacement (Disaster, Government Action) ~~Action of Housing Owner, Inaccessibility, Property Disposition~~
- 1 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)
- 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)

**Fire Victims**

**Witness Relocation**

**Families with income between 50% and 80% AMI**

4. Relationship of preferences to income targeting requirements:

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

**Note: The Tacoma Housing Authority will select families based on the following preferences within each bedroom size category:**

**A. First Preference Category:**

1. **Households whose incomes are below 50% of the area median income will receive preference over higher income applicants.**

**B. Second Preference Category:**

1. **Applicants at least 62 years of age or disabled for one-bedroom units.**
2. **Nearly elderly applicants (50 plus) for one-bedroom units.**
3. **Other persons eligible for one-bedroom units.**
4. **Displaced applicants: Individuals or families displaced by government action or whose dwelling has been extensively damaged or destroyed as a result of a fire or disaster declared or otherwise formally recognized pursuant to Federal Disaster Relief Laws. Victims of domestic violence, hate crimes, witness relocation.**
5. **Applicants with an adult family member enrolled in an employment training program, currently working 20 hours a week or more, or attending school on a full or part time basis. This preference is also extended equally to all elderly families and all families whose head or spouse is receiving income based on their inability to work.**
6. **All other eligible applicants.**

**C. Third Preference Category:**

1. Applicants whose incomes are between 50% and 80% of area median.

Based on the above preferences, applicants at and below 50% of median income will be selected for housing in the order set forth in the second preference category. Applicants in the third preference category will be selected for housing when no applicants are available in the second preference category.

Based on the above preferences, all families in preference A will be offered housing before any families in preference B, and preference B families will be offered housing before any families in preference C.

The date and time of application will be noted and utilized to determine the sequence within the above prescribed preferences.

**(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)

**The PHA Application Packet**

- 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: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?

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

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

- Adoption of site based waiting lists  
If selected, list targeted developments below:
- Employing waiting list “skipping” to achieve deconcentration of poverty or income mixing goals at targeted developments  
If selected, list targeted developments below:
- Employing new admission preferences at targeted developments  
If selected, list targeted developments below:
- Other (list policies and developments targeted below)

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

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

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

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

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

**All public housing developments are occupied by extremely low income families**

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

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

## **B. Section 8**

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

### **(1) Eligibility**

a. What is the extent of screening conducted by the PHA? (select all that apply)



- Criminal or drug-related activity only to the extent required by law or regulation
- Criminal and drug-related activity, more extensively than required by law or regulation
- More general screening than criminal and drug-related activity (list factors below)
- Other (list below)

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

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

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

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

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

**Landlord History**

**(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)
- Site offices (if the waiting list is open)**

**(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:

**Verified difficulty identifying dwelling unit or inability to conduct search effectively**

**(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)

**Fire Victims**  
**Witness Relocation**  
**Project-Base**

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

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

\_\_\_ Date and Time

Former Federal preferences

- 1 Involuntary Displacement (Disaster, Government Action, ~~Action of Housing Owner, Inaccessibility, Property Disposition~~)
- 1 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)

**Fire Victims  
Witness Relocation  
Project-Base**

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

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

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

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

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

- The PHA applies preferences within income tiers

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

**Note: Tacoma Housing Authority will select families based on the following Income Targeting:**

- **Not less than 85% of new households receiving a Section 8 Voucher must have incomes at or below 30% of the area median income (A.M.I.) (extremely low income).**
- **Not more than 15% will be targeted toward incomes between 31% and 50% of A.M.I.**

**For example, out of every 20 new vouchers granted, THA will assign 17 (85%) to households with incomes at or below 30% of A.M.I. and 3 (15%) to households with incomes between 31% and 50% of A.M.I.**

**Additional Preferences:**

**THA will give preference to persons based on the criteria above and upon the following factors in the following order:**

- **For one-bedroom units – Applicants at least 62 years of age or disabled;**
- **For one-bedroom units – Nearly elderly applicants (50 plus);**
- **For one-bedroom units – other persons eligible for one-bedroom units;**
- **Project-based units**
- **Displaced applicants: Individuals or families displaced by government action or whose dwelling has been extensively damaged or destroyed as a result of fire or disaster, declared or otherwise formally recognized pursuant to federal disaster relief laws; victims of domestic violence, hate crimes or in need of witness relocation;**
- **Chronological date of application.**

**THA will set-aside 90 Housing Choice vouchers to house persons from programs established to meet the housing needs of families/individuals participating in targeted special needs programs such as Homeless Programs, Chronically Mentally Ill, Persons with Aids, Teen Parents, etc. in accordance with each operational plan.**

#### **(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)

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

[24 CFR Part 903.7 9 (d)]

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

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

##### **(1) Income Based Rent Policies**

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

a. Use of discretionary policies: (select one)

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

---or---

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

b. Minimum Rent

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

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

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

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

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

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

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

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

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

### For Social Security Contributions

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 **(Not Elderly)**
- No

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

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

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

- Market comparability study
- Fair market rents (FMR)
- 95<sup>th</sup> percentile rents
- 75 percent of operating costs

- 100 percent of operating costs for general occupancy (family) developments
- Operating costs plus debt service
- The "rental value" of the unit
- Other (list below)

f. Rent re-determinations:

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

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

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

**(2) Flat Rents**

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

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

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

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

**(1) Payment Standards**

Describe the voucher payment standards and policies.

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

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

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

(select all that apply)

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

c. If the payment standard is higher than FMR, why has the PHA chosen this level?

(select all that apply)

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

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

- Annually
- Other (list below)

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

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

## **(2) Minimum Rent**

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

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

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

## **5. Operations and Management**

[24 CFR Part 903.7 9 (e)]

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

### **A. PHA Management Structure**

Describe the PHA's management structure and organization.

(select one)



- An organization chart showing the PHA's management structure and organization is attached.
- A brief description of the management structure and organization of the PHA follows:

**2002 Annual Plan-Management**

The operations of THA are overseen by a Board of Commissioners and by administrative staff. The Board consists of five (5) citizens of Tacoma appointed by statute. Consistent with QHWRA, one (1) commissioner is a resident of Salishan (THAs largest family development).

The Executive Director reports to the Board, and reporting to him are directors of the departments described below:

Property Management - Public Housing functions are geographically separated into four areas, each supported by property management, leasing and occupancy personnel, maintenance, and inspection services. Senior sites are locally assisted by resident keyholders/managers. Work orders are centralized. Our computer and technology support personnel report to this department.

Affordable Housing - Section 8 functions are supported by a manager who oversees leasing and occupancy, inspection services, and receptionists.

Finance – Financial support is in-house, including purchasing and inventory control.

Development – The department coordinates and inspects all modernization, revitalization and property acquisition and development activity.

Resident Services – All programs associated with resident supportive services are administered through this department. Many positions are grant-funded.

**B. HUD Programs Under PHA Management**

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

<b>Program Name</b>	<b>Units or Families Served at Year Beginning</b>	<b>Expected Turnover</b>
Public Housing	1480	20%
Section 8 Vouchers	3266	24%
Section 8 Certificates	0	0
Section 8 Mod Rehab	84	30%
Special Purpose Section 8 Certificates/Vouchers (list		

individually) HOME Certificates	25	50%
TEEN Parent Program	5	0%
Homeless Vouchers & Certificates	100	50%
Public Housing Drug Elimination Program (PHDEP)	1480	20%
Other Federal Programs(list individually)		
<b>1999 ROSS RSDM-Family</b>	236	20%
<b>ROSS RSDM-Elderly</b>	349	20%
<b>2001 ROSS RSDM-Family</b>	120	20%

### **C. Management and Maintenance Policies**

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

- Public Housing Maintenance and Management: (list below)

**Admissions and Occupancy Policy**

**Maintenance Policy**

**Pet Policy**

**Grievance Procedure**

- (2) Section 8 Management: (list below)

**Administrative Plan**

## **6. PHA Grievance Procedures**

[24 CFR Part 903.7 9 (f)]

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

### A. Public Housing

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

If yes, list additions to federal requirements below:

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

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

### B. Section 8 Tenant-Based Assistance

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

If yes, list additions to federal requirements below:

2. Which PHA office should applicants or assisted families contact to initiate the informal review and informal hearing processes? (select all that apply)

- PHA main administrative office  
 Other (list below)

## 7. Capital Improvement Needs

[24 CFR Part 903.7 9 (g)]

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

### A. Capital Fund Activities

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

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

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

Select one:

- The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment WA05b01.

-or-

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

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

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

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

b. If yes to question a, select one:

- The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state name WA005b01)

-or-

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

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

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

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

1. Development name: Salishan
2. Development (project) number: WA19URD005100
3. Status of grant: (select the statement that best describes the current status)
  - Revitalization Plan under development
  - Revitalization Plan submitted, pending approval
  - Revitalization Plan approved
  - Activities pursuant to an approved Revitalization Plan underway

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

Yes  No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?  
If yes, list developments or activities below:

**Hillside Terrace Development**  
**Salishan Housing Development and Scattered Sites**

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

**8. Demolition and Disposition**

[24 CFR Part 903.7 9 (h)]

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

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

2. Activity Description

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

<b>Demolition/Disposition Activity Description</b>
1a. Development name: <b>Hillside Terrace</b>
1b. Development (project) number: <b>WA19P005018</b>
2. Activity type: Demolition <input checked="" type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one)

Approved <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: <b>(2/6/97)</b>
5. Number of units affected: 37
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: <b>10/1/99</b> b. Projected end date of activity: <b>12/31/2003</b>

2. Activity Description

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

<b>Demolition/Disposition Activity Description</b>
1a. Development name: <b>Salishan</b>
1b. Development (project) number: <b>WA19URD005D99 and WA19P005003</b>
2. Activity type: Demolition <input checked="" type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one) Approved <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: <b>(9/10/96)</b>
5. Number of units affected: <b>88</b>
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: <b>10/1/99</b> b. Projected end date of activity: <b>12/31/2003</b>

2. Activity Description

Yes  No: Has the PHA provided the activities description information in the **optional** Public Housing Asset Management Table? (If “yes”, skip

to component 9. If “No”, complete the Activity Description table below.)

<b>Demolition/Disposition Activity Description</b>	
1a. Development name:	<b>Hillside Terrace (1500 Block)</b>
1b. Development (project) number:	<b>WA19P005018</b>
2. Activity type:	Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one)	Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date application approved, submitted, or planned for submission:	<b>(01/24/02)</b>
5. Number of units affected:	16
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: <b>04/24/02</b> b. Projected end date of activity: <b>12/31/02</b>

2. Activity Description

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

<b>Demolition/Disposition Activity Description</b>	
1a. Development name:	<b>Hillside Terrace (2300 Block)</b>
1b. Development (project) number:	<b>WA19P005018</b>
2. Activity type:	Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one)	Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date application approved, submitted, or planned for submission:	<b>(4/01/02)</b>
5. Number of units affected:	<b>20</b>
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: <b>5/01/02</b>

b. Projected end date of activity: **08/15/02**

2. Activity Description

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

<b>Demolition/Disposition Activity Description</b>	
1a. Development name:	<b>Hillside Terrace (2300 Block)</b>
1b. Development (project) number:	<b>WA19P005018</b>
2. Activity type:	Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one)	Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date application approved, submitted, or planned for submission:	<b>8/01/02</b>
5. Number of units affected:	<b>25</b>
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: <b>11/01/02</b> b. Projected end date of activity: <b>01/15/03</b>

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

[24 CFR Part 903.7 9 (i)]

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

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



skip to component 10.)

2. Activity Description

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

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

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

[24 CFR Part 903.7 9 (j)]

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

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

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

2. Activity Description

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

table below.

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

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

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

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

[24 CFR Part 903.7 9 (k)]

**A. Public Housing**

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

1.  Yes  No: Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved

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

2. Activity Description

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

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

**B. Section 8 Tenant Based Assistance**

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

eligible to complete a streamlined submission due to high performer status. **High performing PHAs** may skip to component 12.)

1. Program Description:

a. Size of Program

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

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

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

- 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:

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

[24 CFR Part 903.7 9 (l)]

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

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

1. Cooperative agreements:

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

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

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

- Client referrals
- Information sharing regarding mutual clients (for rent determinations and otherwise)
- Coordinate the provision of specific social and self-sufficiency services and programs to eligible families

- Jointly administer programs
- Partner to administer a HUD Welfare-to-Work voucher program
- Joint administration of other demonstration program
- Other (describe)

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

**(1) General**

a. Self-Sufficiency Policies

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

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

b. Economic and Social self-sufficiency programs

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

<b>Services and Programs</b>				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)
1999 ROSS RSDM	236	Specific criteria	Family Investment Center	Public Housing
Resident Employment Pool	195	Other	Family Investment Center	Public Housing
2001 ROSS RSDM	120	Specific criteria	Family Investment Center	Public Housing

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

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2000 Estimate)	Actual Number of Participants (As of: DD/MM/YY)
Public Housing	0	109 (10/1/01)
Section 8	35	67 (10/1/01)

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

**C. Welfare Benefit Reductions**

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

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

**Tacoma Housing Authority is complying with the Community Service Requirement pursuant to section 12(c) of the U.S. Housing Act of 1937, as amended. The Community Service Requirement is included in the resident responsibilities portion of THA's new lease. The Resident Advisory Board and THA's annual plan team are developing the details of the plan for implementation. These requirements will ONLY apply to the Salishan HOPE VI Revitalization Development.**

**At a minimum, the plan will include the following:**

- 1) **THA's policy for administration of the community service and economic self-sufficiency requirements for public housing residents.**
- 2) **The process for determining which family members are subject to or exempt from the service requirement, and the process for determining any changes to exempt or non-exempt status of family members.**
- 3) **THA's plan for providing a written description of the service requirement, and of the process for claiming status as an exempt person and for THA verification of such status.**
- 4) **The process for reviewing family compliance with service requirements.**
- 5) **Procedures for retaining reasonable documentation of service requirement performance or exemption in participant files.**

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

[24 CFR Part 903.7 9 (m)]

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

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

1. Describe the need for measures to ensure the safety of public housing residents (select all that apply)

- High incidence of violent and/or drug-related crime in some or all of the PHA's developments
- High incidence of violent and/or drug-related crime in the areas surrounding or adjacent to the PHA's developments
- Residents fearful for their safety and/or the safety of their children
- Observed lower-level crime, vandalism and/or graffiti
- People on waiting list unwilling to move into one or more developments due to perceived and/or actual levels of violent and/or drug-related crime
- Other (describe below)

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

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

- Other (describe below)

**Private Security**

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

**Salishan  
Hillside Terrace**

**Bergerson Terrace  
Senior Apartments**

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

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

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

**Weed and Seed Program  
Maintenance Crew Uniforms  
Keyless entry at Senior Buildings**

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

**Salishan  
Hillside Terrace**

**Bergerson Terrace  
Senior Apartments**

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

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

- Police involvement in development, implementation, and/or ongoing evaluation of drug-elimination plan
- Police provide crime data to housing authority staff for analysis and action
- Police have established a physical presence on housing authority property (e.g., community policing office, officer in residence)
- Police regularly testify in and otherwise support eviction cases
- Police regularly meet with the PHA management and residents



- Agreement between PHA and local law enforcement agency for provision of above-baseline law enforcement services
- Other activities (list below)

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

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

PHAs eligible for FY 2000 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

- Yes  No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes  No: Has the PHA included the PHDEP Plan for FY 2002 in this PHA Plan?
- Yes  No: This PHDEP Plan is an Attachment.

**14. RESERVED FOR PET POLICY**

[24 CFR Part 903.7 9 (n)]

**15. Civil Rights Certifications**

[24 CFR Part 903.7 9 (o)]

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

**16. Fiscal Audit**

[24 CFR Part 903.7 9 (p)]

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

**17. PHA Asset Management**

[24 CFR Part 903.7 9 (q)]

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

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

## **18. Other Information**

[24 CFR Part 903.7 9 (r)]

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

1.  Yes  No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
  
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
  - Attached at Attachment (File name) WA005d01
  
  - Provided below:
  
3. In what manner did the PHA address those comments? (select all that apply)
  - Considered comments, but determined that no changes to the PHA Plan were necessary.
  - The PHA changed portions of the PHA Plan in response to comments  
List changes below:
  
  - Other: (list below)

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

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

**Note: Tacoma Housing Authority has had a Resident Commissioner since 1989. The Commissioner is appointed by the Mayor.**

### 3. Description of Resident Election Process

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

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

#### b. Eligible candidates: (select one)

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

#### c. Eligible voters: (select all that apply)

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

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

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

1. Consolidated Plan jurisdiction: (City of Tacoma, Washington)
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
- The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.

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

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

#### **D. Other Information Required by HUD**

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

#### **Criteria for Significant Amendment or Modification of the Agency Plan (24 CFR§903.7(r)(ii):**

Tacoma Housing Authority will consider the following changes to its 5-Year Plan and Annual Plan to be “significant” for purposes of triggering the requirements of 24 CFR§ 903.21, including the requirement for reconvening the Resident Advisory Board to review the changes:

- Any change required by amendment in federal statutes, regulations or HUD notices that, in the opinion of THA, has either substantial programmatic or financial effects on the programs that its administers, or creates substantial obligations or administrative burdens beyond the programs under administration at the start of the Plan Year; or,
- Any change that THA’s Board determines to be significant; or,
- Any change that alters:
  - the eligibility criteria for public housing or Section 8 Vouchers;
  - the criteria that determines the order of preference for public housing and Section 8 Vouchers;
  - how much recipients will have to pay in rent or other fees while receiving public housing or Section 8 Vouchers;
  - any plans for demolition of any housing owned or managed by THA
  - any actions included in the Plan for which HUD requires a 30 day resident comment period.

- Any changes covering topics covered by the Plan for which HUD gave notice to applicants, tenants and program participants.

## **Attachments**

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



**Annual Statement/Performance and Evaluation Report**

**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary**

<b>PHA Name:</b> Tacoma Housing Authority	<b>Grant type and Numer</b> Capital Fund Program Grant No: Replacement Housing Factor Grant No: WA19R00550101	<b>FFY of Grant Approval</b>  2001
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Original Annual Statement      Reserve for Disasters/Emergencies     Revised Annual Statement (revision no: )  
 Performance and Evaluation Report for the Program Year Ending \_\_\_\_      Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Orginal	Revised	Obligated	Expended
1	Total Non-CGP Funds			0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)			0.00	0.00
3	1408 Management Improvements			0.00	0.00
4	1410 Administration			0.00	0.00
5	1411 Audit			0.00	0.00
6	1415 Liquidated Damages			0.00	0.00
7	1430 Fees and Costs			0.00	0.00
8	1440 Site Acquisition			0.00	0.00
9	1450 Site Improvements			0.00	0.00
10	1460 Dwelling Structures			0.00	0.00
11	1465.1 Dwelling Equipment - Non Expendable			0.00	0.00
12	1470 Nondwelling Structures			0.00	0.00
13	1475 Nondwelling Equipment			0.00	0.00
14	1485 Demolition			0.00	0.00
15	1490 Replacement Reserve			0.00	0.00
16	1495.1 Relocation Costs			0.00	0.00
17	1499 development Acvtivities	93,043.00		0.00	0.00
18	1502 Contingency (may not exceed 8% of line 19)			0.00	0.00
	Amount of Annual Grant (sum of lines 2 -18)	93,043.00	0.00	0.00	0.00
	Amount of line 19 Related to LBP Activities				
	Amount of line 19 Related to Section 504 Compliance				
	Amount of line 19 Related to Security-Soft costs				
	Amount of line 19 Related to Security-Hard costs				
	Amount of line 19 Related to Energy Conservation Measures				
	Collateralization Expenses or Debt Service				











**Annual Statement/Performance and Evaluation Report  
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary**

<b>PHA Name:</b>  <b>Tacoma Housing Authority</b>	<b>Grant type and Number</b> Capital Fund Program Grant No: <b>WA19P00550102</b> Replacement Housing Factor Grant No:	<b>Federal FY of Grant:</b> <b>2002</b>
<input checked="" type="checkbox"/> Original Annual Statement	<input type="checkbox"/> Reserve for Disasters/Emergencies	<input type="checkbox"/> Revised Annual Statement (revision no: )
<input type="checkbox"/> P&E Report for the Program Year Ending _____	<input type="checkbox"/> <b>Final Performance and Evaluation Report</b>	

Line No.	Summary by Development Account	Total Estimated cost		Total Actual Cost	
		Orginal	Revised	Obligated	Expended
1	Total non-CGP Funds	75,000.00		0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)	50,000.00		0.00	0.00
3	1408 Management Improvements Soft Costs	307,800.00		0.00	0.00
	Mmanagement Improvements - Hard Costs				
4	1410 Administration	344,332.00		0.00	0.00
5	1411 Audit	5,000.00		0.00	0.00
6	1415 Liquidated Damages	0.00		0.00	0.00
7	1430 Fees and Costs	406,778.00		0.00	0.00
8	1440 Site Acquisition	.00		0.00	0.00
9	1450 Site Improvements	125,000.00		0.00	0.00
10	1460 Dwelling Structures	2,597,399.00		0.00	0.00
11	1465.1 Dwelling Equipment - Non Expendable	0.00		0.00	0.00
12	1470 Nondwelling Structures	286,479.00		0.00	0.00
13	1475 Nondwelling Equipment	105,000.00		0.00	0.00
14	1485 Demolition			0.00	0.00
15	1490 Replacement Reserve	0.00		0.00	0.00
16	1492 Moving to work Demonstration				
17	1495.1 Relocation Costs	69,300.00		0.00	0.00
18	1499 Development Activities	0.00		0.00	0.00
19	1502 Contingency	0.00		0.00	0.00
20	Amount of Actual Grant (sum of lines 2 - 19)	4,297,088.00	0.00	0.00	0.00
	Amount of line 20 Related to LBP Activities				
	Amount of line 20 Related to Section 504 Compliance				
	Amount of line 20 Related to Security - Soft Costs	90,000.00	0.00	0.00	0.00
	Amount of line 20 Related to Security - Hard Costs				
	Amount of line 20 Related to Energy Conservation Measures	80,000.00			
	Collateralization Expenses or Debt Service				

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

### Part II: Supporting Pages

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: <b>WA19P00550102</b> Replacement Housing Factor Grant No:					
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Costs	
				Original	Revised	Funds Obligated	Funds Expended
<b>PHA-WIDE</b>	<b>OPERATIONS</b>	<b>1406</b>		<b>50,000</b>			
<b>PHA-WIDE</b>	<b>MANAGEMENT IMPROVEMENTS</b>	<b>1408</b>		<b>307,800</b>			
	1. Provide Staff Training & Education for Modernization Staff		5	7,500			
	2. Security patrol of residents PHA Wide			90,000			
	3. Establishment and Implementation of an Economic Development Program PHA-wide			122,300			
	4. Coordination of Family Support Services at Dixon Village, Bergerson, Hillside			43,000			
	5. Purchase Records Management System			10,000			
	6. Training for resident Council Officers			10,000			
	7. Computer software - PHA-wide - CFP portion only			25,000			
<b>PHA-WIDE</b>	<b>ADMINISTRATIVE COSTS</b>	<b>1410</b>		<b>344,332</b>			
	1. Technical and Non-technical Salaries	1410.2		<b>219,737</b>			
	EXECUTIVE DIRECTOR @ 10%		1	10,712			
	EXECUTIVE DIRECTOR ASSIST @ 5%		1	2,142			
	PROP MANAGEMENT DIRECTOR @ 10%		1	7,981			
	DIRECTOR OF Mod & Econ Dev @ 25%		1	21,846			
	MODERNIZATION MANAGER @ 85%		1	53,651			
	MODERNIZATION COORDINATOR @ 85%		1	46,155			
	MODERNIZATION ASSISTANT @ 100%		1	43,392			
	FINANCE DIRECTOR @ 10%		1	6,963			
	ACCOUNTING SPECIALIST @ 20%		1	8,939			
	ACCOUNTING SPECIALIST @ 5%		1	2,235			
	PURCHASING CLERK @ 5%		1	1,478			
	MIS SPECIALIST @ 15%		1	7,072			
	HUMAN RESOURCE ADMINI @ 15%		1	7,171			
	2. Employee Benefits (40% of salaries)	1410.9	13	87,895			
	3. Publication of CGP Materials	1410.14		7,000			
	4. Sundry Expenses (Advertising)	1410.19		10,000			
	5. Legal	1410.4		15,000			
	6. Fuel for Mod Vehicles/Copier maintenance			4,700			

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

### Part II: Supporting Pages

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: <b>WA19P00550102</b> Replacement Housing Factor Grant No:					
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Costs	
				Original	Revised	Funds Obligated	Funds Expended
<b>PHA-WIDE</b>	<b>AUDIT</b>	<b>1411</b>		<b>5,000</b>			
<b>PHA-WIDE</b>	<b>FEES AND COSTS</b>	<b>1430</b>		<b>406,778</b>			
	1. A/E fees for Salishan	1430.1		200,642			
	2. A/E Fees for M Street			79,000			
	3. Consulting fees	1430.2		50,000			
	4. Fees & Permits for non-residential	1430.6		1,000			
	5. Inspection Cost	1430.7		66,136			
	6. Sundry Expenses (Reproduction)	1430.19		10,000			
	<b>NON-DWELLING EQUIPMENT</b>	<b>1475</b>		<b>105,000</b>			
<b>WA19P005008</b>	Common-area furniture for M Street			5,000			
	Telephone Upgrades PHA wide			50,000			
	Technology upgrades PHA Wide			30,000			
	Copy machine for Revite staff			15,000			
	Technology upgrades for Mod Staff		1	5,000			
<b>PHA-WIDE</b>	<b>RELOCATION COSTS</b>	<b>1495</b>		<b>69,300</b>			
<b>WA19P005008</b>	<b>M Street</b>						
	<i>Section 8 - \$75,000 - roof repair</i>	<b>1460</b>		<b>75,000</b>			
<b>WA19P00518</b>	<b>Hillside Terrace</b>	<b>1460</b>		<b>400,000</b>			
	Interior Renovations						
	Reconfigure units			400,000			
<b>WA19P005008</b>	<b>1202 South M Street</b>			<b>2,322,399</b>			
	<b>- DWELLING STRUCT</b>	<b>1460</b>	46	<b>2,197,399</b>			
	Interior Revitalization			2,197,399			
	a. New heating system, stair handrails, closet doors, window coverings						
	b. Insulate walls, upgrade bathrooms						
	c. Replace kitchen cabinets, countertops, sinks, faucets						
	d. Repaint interiors, new floor coverings						
	New Roof, common area HVAC						

**Annual Statement/Performance and Evaluation Report**

**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary**

**Part II: Supporting Pages**

PHA Name: Tacoma Housing Authority		<b>Grant type and Number</b> Capital Fund Program Grant No: <b>WA19P00550102</b> Replacement Housing Factor Grant No:					
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Costs	
				Original	Revised	Funds Obligated	Funds Expended
	<b>Site work</b>		<b>1450</b>	<b>125,000</b>			
	Parking lots, site utilities, site lighting/security, asbestos abatement, landscaping, irrigation system			125,000			
	<b>NON-DWELLING STRUCTURES</b>		<b>1470</b>	<b>286,479</b>			
<b>WA19P005008</b>	902 S.L. Street Admin. Bldg Windows for East and North side of bldg			50,000			
<b>WA19P005003</b>	Remodel Salishan Admin/Fic to support HOPEVI CSS operations			236,479			
<b>PHA-WIDE</b>	<b>CONTINGENCY</b>		<b>1502</b>	<b>0</b>			







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<b>Federal FY of Grant</b> 2002
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Status of Work
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SUPPLEMENTAL INFORMATION TO 2002 ANNUAL STATEMENT

TACOMA HOUSING AUTHORITY

SOURCE OF NON-CGP FUNDS

AMOUNT

Section 8 Reimbursement to CGP for Admin. Bldg.

75,000.00 M Street

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary**

<b>PHA Name:</b> Tacoma Housing Authority	<b>Grant type and Numer</b> Capital Fund Program Grant No: Replacement Housing Factor Grant No: WA19R00550102R	<b>FFY of Grant Approval</b>  2002
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<input checked="" type="checkbox"/> Original Annual Statement	<input type="checkbox"/> Reserve for Disasters/Emergencies	Revised Annual Statement (revision no: )
<input type="checkbox"/> Performance and Evaluation Report for the Program Year Ending ____	<input type="checkbox"/> Final Performance and Evaluation Report	

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds			0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)			0.00	0.00
3	1408 Management Improvements			0.00	2.00
4	1410 Administration			0.00	0.00
5	1411 Audit			0.00	0.00
6	1415 Liquidated Damages			0.00	0.00
7	1430 Fees and Costs			0.00	0.00
8	1440 Site Acquisition			0.00	0.00
9	1450 Site Improvements			0.00	0.00
10	1460 Dwelling Structures			0.00	0.00
11	1465.1 Dwelling Equipment - Non Expendable			0.00	0.00
12	1470 Nondwelling Structures			0.00	0.00
13	1475 Nondwelling Equipment			0.00	0.00
14	1485 Demolition			0.00	0.00
15	1490 Replacement Reserve			0.00	0.00
16	1495.1 Relocation Costs			0.00	0.00
17	1499 development Acvtivities	93,043.00		0.00	0.00
18	1502 Contingency (may not exceed 8% of line 19)			0.00	0.00
	Amount of Annual Grant (sum of lines 2 -18)	93,043.00	0.00	0.00	2.00
	Amount of line 19 Related to LBP Activities				
	Amount of line 19 Related to Section 504 Compliance				
	Amount of line 19 Related to Security-Soft costs				
	Amount of line 19 Related to Security-Hard costs				
	Amount of line 19 Related to Energy Conservation Measures				
	Collateralization Expenses or Debt Service				

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**Annual Statement/Performance and Evaluation Report**

**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary**

PHA Name: <b>Tacoma Housing Authority</b>	Grant type and Numer Capital Fund Program Grant No: WA19P0050201 Replacement Housing Factor Grant No:
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<input type="checkbox"/> Original Annual Statement	<input checked="" type="checkbox"/> Reserve for Disasters/Emergencies
<input type="checkbox"/> Performance and Evaluation Report for the Program Year Ending 12/31/01	<input type="checkbox"/> Final Performance and Evaluation Report

Line No.	Summary by Development Account	Total Estimated Cost		Total A
		Orginal	Revised	Obligated
1	Total Non-CGP Funds			0.00
2	1406 Operations (May not exceed 20% of line 19)			0.00
3	1408 Management Improvements			0.00
4	1410 Administration	0.00	4,552.00	4,552.00
5	1411 Audit			0.00
6	1415 Liquidated Damages			0.00
7	1430 Fees and Costs	500.00	2,000.00	2,000.00
8	1440 Site Acquisition			0.00
9	1450 Site Improvements			0.00
10	1460 Dwelling Structures	35,000.00	32,048.00	32,048.00
11	1465.1 Dwelling Equipment - Non Expendable			0.00
12	1470 Nondwelling Structures			0.00
13	1475 Nondwelling Equipment			0.00
14	1485 Demolition			0.00
15	1490 Replacement Reserve			0.00
16	1495.1 Relocation Costs			0.00
17	1499 development Acvtivities	0.00		0.00
18	1502 Contingency (may not exceed 8% of line 19)	3,100.00	0.00	0.00
	Amount of Annual Grant (sum of lines 2 -18)	38,600.00	38,600.00	38,600.00
	Amount of line 19 Related to LBP Activities			
	Amount of line 19 Related to Section 504 Compliance			
	Amount of line 19 Related to Security-Soft costs			
	Amount of line 19 Related to Security-Hard costs			
	Amount of line 19 Related to Energy Conservation Measures			
	Collateralization Expenses or Debt Service			

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FFY of Grant Approval
2001
Actual Cost
Expended
0.00
0.00
0.00
4,552.00
0.00
0.00
2,000.00
0.00
0.00
32,048.00
0.00
0.00
0.00
0.00
0.00
0.00
0.00
0.00
0.00
38,600.00













**HOUSING AUTHORITY OF THE CITY OF TACOMA**  
**DECONCENTRATION POLICY**

It is the policy of the Housing Authority of the City of Tacoma to provide for deconcentration of poverty and encourage income mixing by bringing higher income families into lower income developments and lower income families into higher income developments. Toward this end, we will skip families on the waiting list to reach other families with a lower or higher income. We will accomplish this in a uniform and non-discriminating manner.

The Housing Authority will affirmatively market its housing to all eligible income groups. Lower income residents will not be steered toward lower income developments and higher income people will not be steered to higher income developments.

Prior to the beginning of each fiscal year, we will analyze the income levels of families residing in each of the developments, the income levels of census tracts in which the developments are located, and the income levels of the families on the waiting list. Based on this analysis, we will determine the level of marketing strategies and deconcentration incentives to implement.

## CHAS Table 1C - Black Non-Hispanic Households

- The following estimates are derived from 2002 projection data. The data project the following:
- i The change in the number of households in this jurisdiction from 1990 to 2002 is estimated at -0.82%.
  - i The renter occupied households in 2002 is estimated at 38.07% of all occupied units. The owner occupied households in 2002 is estimated at 61.93% of all occupied units.
  - i The change in elderly is estimated to be +1.81% from 1990 to 2002.

Name of Jurisdiction:	Source of Data	Data is Adjusted per Community 2020 Projections for the Year:	
Edgecombe County, NC	CHAS Data Book	2002	
Household by Type, Income, & Housing Problem	Elderly 1 & 2 member households	Small Related (2 to 4)	Renters

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

### Part II: Supporting Pages

PHA Name					Federal FY of Grant:			
<b>Tacoma Housing Authority</b>					<b>1998</b>			
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised	Funds Obligated	Funds Expended	
<b>PHA-WIDE</b>	<b>MANAGEMENT IMPROVEMENTS</b>	<b>1408</b>		<b>250,274.59</b>	<b>258,440.54</b>	<b>258,440.54</b>	<b>258,440.54</b>	
	1. Provide Staff Training & Tuition for job Related College Courses			14,852.55	15,879.29	15,879.29	15,879.29	
	2. Security of residents PHA Wide			77,792.81	77,792.81	77,792.81	77,792.81	
	3. Develop & Maintain resident job training programs - economic dev.			150,855.55	157,994.76	157,994.76	157,994.76	
	4. Records Management Needs Assessment & Implementation			0.00	0.00	0.00	0.00	Moved to 708 (1999)
	5. Computer Software Upgrade			6,773.68	6,773.68	6,773.68	6,773.68	Moved remaining to 708
	6. Upgrade property mgmt. Staff skills to manage mod units			0.00	0.00	0.00	0.00	Moved to 708 (1999)
	7. Update Preventative Maintenance Plan			0.00	0.00	0.00	0.00	Moved to 708 (1999)
<b>PHA-WIDE</b>	<b>ADMINISTRATIVE COSTS</b>	<b>1410</b>		<b>407,545.37</b>	<b>404,481.07</b>	<b>404,481.07</b>	<b>404,481.07</b>	
	<b>1. Technical and Non-technical Salaries</b>	1410.2		<b>276,867.00</b>	<b>276,064.00</b>	<b>276,064.00</b>	<b>276,064.00</b>	
	EXECUTIVE DIRECTOR @ 2%			1,900.00	1,900.00			
	DEPUTY EXECUTIVE DIR/COO @ 20%			15,508.00	15,508.00			
	DIRECTOR REVITALIZATION @ 80%			35,853.00	35,853.00			
	PROJECT MANAGER @ 100%			51,782.00	51,782.00			
	PROJECT MANAGER @ 30%			29,782.00	29,782.00			Exclusion from 10% limit
	MOD BUDGET ANALYST @ 100%			42,945.00	42,945.00			
	MODERNIZATION CLERK @ 100%			32,917.00	32,917.00			
	CLERK TYPIST @ 70%			18,423.00	18,423.00			
	ADMIN. SECR. @ 45%			16,340.00	16,340.00			
	EXECUTIVE SECRETARY @ 2%			677.00	677.00			
	PROP MANAGEMENT DIRECTOR @ 2%			1,432.00	1,432.00			
	FINANCE DIRECTOR @ 6%			3,837.00	3,837.00			
	MIS MANAGER @ 6%			3,440.00	3,440.00			
	MIS SPECIALIST @ 10%			3,319.00	3,319.00			
	MA IV ACCT @ 5%			2,005.00	2,005.00			
	MA IV ACCT @ 10%			4,010.00	4,010.00			
	PURCHASING ASST. @ 5%			1,697.00	1,697.00			
	PROJECT MANAGER @ 20%			11,000.00	10,197.00			

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

### Part II: Supporting Pages

PHA Name		Federal FY of Grant:						
Tacoma Housing Authority		1998						
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised	Funds Obligated	Funds Expended	
	<b>2. Employee Benefits</b>	<b>1410.9</b>		<b>95,747.67</b>	<b>95,747.30</b>	<b>95,747.30</b>	<b>95,747.30</b>	
	<b>3. Publication of CGP Materials</b>	<b>1410.14</b>		<b>2,546.56</b>	<b>2,546.56</b>	<b>2,546.56</b>	<b>2,546.56</b>	
	<b>4. Sundry Expenses (Advertising)</b>	<b>1410.19</b>		<b>26,316.70</b>	<b>24,055.77</b>	<b>24,055.77</b>	<b>24,055.77</b>	
	<b>5. Legal</b>	<b>1410.4</b>		<b>6,067.44</b>	<b>6,067.44</b>	<b>6,067.44</b>	<b>6,067.44</b>	
<b>PHA-WIDE</b>	<b>AUDIT</b>	<b>1411</b>		<b>2,000.00</b>	<b>2,000.00</b>	<b>2,000.00</b>	<b>2,000.00</b>	
<b>PHA-WIDE</b>	<b>FEES AND COSTS</b>	<b>1430</b>		<b>691,039.53</b>	<b>584,860.89</b>	<b>584,860.89</b>	<b>584,860.89</b>	
	1. A/E Fees for Salishan	1430.1		125,609.00	101,360.51	101,360.51	101,360.51	
	2. Consulting Fees	1430		27,738.00	23,643.00	23,643.00	23,643.00	
	3. Inspection Cost	1430.7		81,968.37	81,968.37	81,968.37	81,968.37	
	4. Update Salishan Master Plan	1430.1		12,340.00	12,340.00	12,340.00	12,340.00	
	5. Utility Analyses	1430.1		0.00	0.00	0.00	0.00	
	6. Sundry Expenses (Reproduction)	1430.19		8,594.80	3,980.47	3,980.47	3,980.47	
	7. Space Analyses for 902 L st.	1430.1		79,240.00	75,416.74	75,416.74	75,416.74	
	8. A/E Fees for 6th and Fawcett			109,017.70	76,850.97	76,850.97	76,850.97	
	9. Hillside Terrace A/E Services			246,531.66	209,300.83	209,300.83	209,300.83	
	10. A/E Fees for M Street Radio			0.00	0.00	0.00	0.00	Moved to 708
<b>PHA-WIDE</b>	<b>Misc Roofing Materials</b>	<b>1460</b>		<b>0.00</b>	<b>2,337.61</b>	<b>2,337.61</b>	<b>2,337.61</b>	
<b>PHA-WIDE</b>	<b>NON-DWELLING EQUIPMENT</b>	<b>1475</b>		<b>96,958.12</b>	<b>96,469.86</b>	<b>96,469.86</b>	<b>96,469.86</b>	
	Moss Inhibitor Sprayer			0.00	0.00	0.00	0.00	Moved to future CFP
	Civil Equipment			0.00	0.00	0.00	0.00	Moved to future CFP
	Line Printer for CCS Reports			1,810.00	1,810.00	1,810.00	1,810.00	
	Auto Cad with Zip Drive			0.00	0.00	0.00	0.00	Moved to future CFP
	Upgrade Computers			10,671.42	10,671.42	10,671.42	10,671.42	
	Comp. Staff Furniture			450.78	493.50	493.50	493.50	Remaining work to 708
	Tools and Equipment for Remote Sites			8,336.45	8,293.73	8,293.73	8,293.73	
	Stove & Refer 6th Ave Community room			0.00	810.00	810.00	810.00	Needs assessment
	Emergency Boiler Repair at 6th Avenue			2,839.69	2,839.69	2,839.69	2,839.69	
	Misc equip needed for the install of roofs			0.00	0.00	0.00	0.00	
	THA Wide Communication System - Radios			65,900.00	65,900.00	65,900.00	65,900.00	Mgmt needs to radio



# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

### Part II: Supporting Pages

PHA Name				Federal FY of Grant:				
Tacoma Housing Authority				1998				
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised	Funds Obligated	Funds Expended	
	One step van for Maint use			6,949.78	5,651.52	5,651.52	5,651.52	
<i>Non-CGP</i>	<i>Two Step Vans for Maint. Use (Sec. 8 Reimb)</i>			<i>47,790.00</i>	<i>47,790.00</i>	<i>47,790.00</i>	<i>47,790.00</i>	
<i>Non-CGP</i>	<i>Hydro Machine (Sec. 8 Reimb)</i>			0.00	0.00	0.00	0.00	Moved to 708 1999
<i>Non-CGP</i>	<i>Sewer Video Camera (Sec. 8 Reimb)</i>			0.00	0.00	0.00	0.00	Moved to 708 1999
<i>Non-CGP</i>	<i>52' Walk Behind Mower (Sec. 8 Reimb)</i>			0.00	0.00	0.00	0.00	Moved to 708 1999
<b>PHA-WIDE</b>	<b>RELOCATION COSTS</b>	<b>1495</b>		<b>96,691.89</b>	<b>96,557.40</b>	<b>96,557.40</b>	<b>96,557.40</b>	
<b>WA19P005003</b>	<b>SALISHAN</b>			<b>959,194.41</b>	<b>921,403.44</b>	<b>921,403.44</b>	<b>921,403.44</b>	
<b>WA19P005004</b>	<b>Dwelling Structures</b>	<b>1460</b>		<b>910,141.06</b>	<b>872,953.38</b>	<b>872,953.38</b>	<b>872,953.38</b>	
<i>NONCGP WA19P005005</i>	<i>1. Replace heating systems (Environmental Justice Grant)</i>			<i>30,000.00</i>	<i>30,000.00</i>	<i>30,000.00</i>	<i>30,000.00</i>	
<b>WA19P005007</b>	2. Thirty roof replacements			178,476.96	178,476.96	178,476.96	178,476.96	
	3. Salishan Emergency Roof Replace/Repairs			678,135.10	640,947.42	640,947.42	640,947.42	
	4. Renovation work 2 Single Family Units-Youth Build			53,529.00	53,529.00	53,529.00	53,529.00	
<i>NON CGP - Youth Build Grant</i>	<i>4. Renovation work 2 Single Family Units-Youth Build</i>			<i>14,392.00</i>	<i>14,392.00</i>	<i>14,392.00</i>	<i>14,392.00</i>	
	5. Demo 4 units	<b>1485</b>		<b>2,111.35</b>	<b>1,508.06</b>	<b>1,508.06</b>	<b>1508.06</b>	Retainage from 706
	6. Emerg. Lawn repair FIC	<b>1450</b>		<b>2,550.00</b>	<b>2,550.00</b>	<b>2,550.00</b>	<b>2550.00</b>	Moved from 708
<b>WA19P005006</b>	<b>911 N K Street</b>			<b>244,844.33</b>	<b>244,844.33</b>	<b>244,844.33</b>	<b>244,844.33</b>	
	<b>Site Improvements</b>	<b>1450</b>		<b>1,125.00</b>	<b>1,125.00</b>	<b>1,125.00</b>	<b>1,125.00</b>	
	1. Upgrade irrigation system							
	2. Expand and upgrade parking lot							
	3. Install site subdrainage							
	4. Upgrade patio							
	5. Repair patio fencing s/w side			1,125.00	1,125.00	1,125.00	1,125.00	
	<b>Dwelling Structures</b>	<b>1460</b>		<b>208,343.33</b>	<b>208,343.33</b>	<b>208,343.33</b>	<b>208,343.33</b>	Portion moved from 705
	<b>1. Interior Modernization</b>		43					
	a. Upgrade common area restrooms							
	b. Upgrade stairwells							
	c. Upgrade or replace boiler							
	d. Upgrade elevators							

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

### Part II: Supporting Pages

PHA Name				Federal FY of Grant:				
Tacoma Housing Authority				1998				
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised	Funds Obligated	Funds Expended	
	e. Install fire sprinkler system							
	f. Upgrade fire alarm							
	g. Renovate laundry room							
	h. Replace hall carpeting							
	i. Upgrade apartment entry doors							
	j. Replace lights, switches, electrical outlets and phone jacks							
	k. Replace kitchen counter tops, sinks and faucets							
	l. Repaint apartment interiors and refinish kitchen cabinets and interior doors							
	p. Replace floor coverings							
	q. Renovate roofing							
	r. Replace corridor handrails							
	s. Renovate community rooms, corridors, lobby, and lounges							
	t. Upgrade wheelchair ramps							
	u. Upgrade ventilation system							
	v. Install garbage disposals and dishwashers							
	w. Install draftstops in attic							
	x. Install cleanouts to sewer drains							
	y. Add resident manager office							
<b>WA19P005006</b>	<b>Dwelling Equipment</b>	<b>1465.1</b>		<b>35,376.00</b>	<b>35,376.00</b>	<b>35,376.00</b>	<b>35,376.00</b>	
	1. Replace refrigerators and ranges		43	35,376.00	35,376.00	35,376.00	35,376.00	
<b>WA19P005009</b>	<b>3201 South Fawcett</b>			<b>109,163.62</b>	<b>135,839.12</b>	<b>135,839.12</b>	<b>0.00</b>	
	(Total cost estimated at \$1,200,000)							
	<b>Site Improvements</b>	<b>1450</b>		<b>34,800.00</b>	<b>34,800.00</b>	<b>34,800.00</b>	<b>34,800.00</b>	
	1. Re-landscape							
	2. Upgrade irrigation system							
	3. Upgrade parking lot							
	<b>Dwelling Structures</b>	<b>1460</b>		<b>48,898.00</b>	<b>75,573.50</b>	<b>75,573.50</b>	<b>75,573.50</b>	

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

### Part II: Supporting Pages

PHA Name						Federal FY of Grant:		
Tacoma Housing Authority						1998		
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised	Funds Obligated	Funds Expended	
<i>Non CGP</i>	<i>Funded from Sec. 8 Reimb.</i>	1460		0.00	0.00	0.00	0.00	<i>Funds used for 6th Ave</i>
	<b>1. Interior Modernization</b>	<b>1460</b>	30	48,898.00	75,573.50	75,573.50	75,573.50	
	a. Upgrade common area restrooms							
	b. Upgrade stairwells							
	g. Renovate laundry room							
	w. Renovate office area and add resident manager office							
	<b>Dwelling Equipment</b>	<b>1465.1</b>		<b>24,698.00</b>	<b>24,698.00</b>	<b>24,698.00</b>	<b>24,698.00</b>	
	1. Replace refrigerators and ranges		30	24,698.00	24,698.00	24,698.00	24,698.00	
	2. Install garbage disposals and dishwashers							
	<b>Non-dwelling Equipment</b>							
	1. Community room furniture	<b>1475</b>		<b>767.62</b>	<b>767.62</b>	<b>767.62</b>	<b>767.62</b>	Remaining moved to 708
<b>WA19P005013</b>	<b>401 NORTH G STREET</b>							
	<b>Non-dwelling Equipment</b>							
	1. Community room furniture	<b>1475</b>		<b>329.02</b>	<b>329.02</b>	<b>329.02</b>	<b>329.02</b>	Remaining moved to 708
<b>WA19P005014</b>	<b>2302 6th Avenue</b>			<b>649,591.82</b>	<b>649,591.82</b>	<b>649,591.82</b>	<b>649,591.82</b>	
<i>Non CGP</i>	<i>Funded from Sec. 8 Reimb.</i>	1460		13,800.00	13,800.00	13,800.00	13,800.00	
	<b>Sitework</b>	<b>1450</b>		<b>74,850.00</b>	<b>74,850.00</b>	<b>74,850.00</b>	<b>74,850.00</b>	Work from 709 2000
	1. Install additional site lighting							
	2. Install perimeter fencing							
	3. Install site subdrainage							
	4. Upgrade parking lot							
	5. Re-landscape							
	6. Replace exterior sanitary sewer							
	7. Install H/C ramp at common room door							
<b>WA19P005014</b>	<b>Dwelling Structures</b>	<b>1460</b>		<b>574,741.82</b>	<b>574,741.82</b>	<b>574,741.82</b>	<b>574,741.82</b>	
<b>6th Ave cont.</b>	a. Upgrade common area restrooms							
	b. Upgrade stairwells							

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

### Part II: Supporting Pages

PHA Name				Federal FY of Grant:				
Tacoma Housing Authority				1998				
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised	Funds Obligated	Funds Expended	
	c. Upgrade boiler							
	d. Upgrade elevator							
	e. Install fire sprinkler system							
	f. Upgrade fire alarm							
	<b>Dwelling Equipment</b>	<b>1465.1</b>	<b>2 units</b>	<b>1,568.00</b>	<b>21,758.00</b>	<b>21,758.00</b>	<b>21,758.00</b>	<b>Work from 709 2000</b>
<b>WA19P005020</b>	<b>BERGERSON TERRACE</b>			<b>361,723.59</b>	<b>361,723.59</b>	<b>361,723.59</b>	<b>361,723.59</b>	
	<b>Site Improvements</b>	<b>1450</b>		<b>7,310.50</b>	<b>7,310.50</b>	<b>7,310.50</b>	<b>7,310.50</b>	Remain work moved
	1. Re-landscape							
	2. Grade, overlay and re-stripe parking lot							
	3. Install additional playground equipment							
	4. Replace sidewalks							
	5. Dig out area around existing community room to prevent access to roof							
	6. Remove large trees							
	7. Install automated irrigation system							
	8. Repaint handrails and guardrails							
	9. Install additional site lighting (Drug Elem)			7,310.50	7,310.50	7,310.50	7,310.50	
<i>NON CGP</i>	<i>9. Install additional site lighting</i>	*		<i>7,007.00</i>	<i>7,007.00</i>	<i>7,007.00</i>	<i>7,007.00</i>	
<i>NON CGP</i>	<i>10. Credit for materials: Allied Building Products</i>	*		<i>73,451.00</i>	<i>73,451.00</i>	<i>73,451.00</i>	<i>0.00</i>	<i>Moved to 708</i>
<b>WA19P005020</b>	<b>Dwelling Structures</b>	<b>1460</b>		<b>347,406.09</b>	<b>347,406.09</b>	<b>347,406.09</b>	<b>347,406.09</b>	
	1. Waterproof foundation walls							Work moved to 708 1999
	2. Replace windowsills & coverings							Work moved to 708 1999
	3. Replace heaters							Work moved to 708 1999
	4. Replace flooring & subflooring			674.09	674.09	674.09	674.09	Remain work moved to 708
	5. Replace entry & closet doors, including hardware and locks on outer							
	6. Replace windows and siding			346,732.00	346,732.00	346,732.00	346,732.00	From 2000 CFP
<b>WA19P005022</b>	<b>SCATTERED SITES</b>	<b>1460</b>		<b>70,837.00</b>	<b>70,837.00</b>	<b>70,837.00</b>	<b>70,837.00</b>	
	<b>6750 E 'B' Street</b>							
	<b>Dwelling Structures</b>	<b>1460</b>	<b>1</b>	<b>70,837.00</b>	<b>70,450.00</b>	<b>70,450.00</b>	<b>70,450.00</b>	
	1. Refinish decks							

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

### Part II: Supporting Pages

PHA Name				Federal FY of Grant:				
Tacoma Housing Authority				1998				
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised	Funds Obligated	Funds Expended	
	2. Replace roof gutters							
	3. Remodel kitchen and bath cabinets, counter							
	4. Repair mold damage in bedroom and							
	5. Install window screens							
	6. Replace kitchen floor coverings							
	7. Repaint interior							
	8. Replace aluminum windows with vinyl							
	Repair bathroom floor 2130 So L	1460			387.00	387.00	387.00	
<b>WA19P005024</b>	<b>SCATTERED SITES</b>			<b>11,021.00</b>	<b>51,308.60</b>	<b>51,308.60</b>	<b>51,308.60</b>	
	5801 E Roosevelt							
	2146 S. Sheridan							
	<b>Dwelling Structures</b>	<b>1460</b>	<b>2</b>	<b>11,021.00</b>	<b>51,308.60</b>	<b>51,308.60</b>	<b>51,308.60</b>	
	4. Repair or replace severely damaged roofs and gutters							
	6. Repair severe mold damage							
	7. Install exhaust fans in bathroom, kitchens and							
	8. Replace severely damaged screen door							
	9. Install additional smoke detectors							
	10. Replace outlets in kitchen with GFI							
	11. Install front door bells							
	14. Repaint exterior/exterior							
	15. Replace cracked tub surrounds							
	18. Upgrade hollow interior doors							
	19. Replace kitchen floor coverings							
	<b>Dwelling Equipment</b>	<b>1465</b>		<b>801.00</b>	<b>801.00</b>	<b>801.00</b>	<b>801.00</b>	
	Stove and referigerator Roosevelt							
<b>WA19P005025</b>	<b>SCATTERED SITES</b>			<b>0.00</b>	<b>920.00</b>	<b>920.00</b>	<b>920.00</b>	
	6932 s. Madison							
	<b>Dwelling Structures</b>	<b>1460</b>		920.00	920.00	920.00	920.00	
	1. Replace windows		5					

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

### Part II: Supporting Pages

PHA Name						Federal FY of Grant:		
Tacoma Housing Authority						1998		
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
				Original	Revised	Funds Obligated	Funds Expended	
<b>WA19P005008</b>	<b>1202 South M Street</b>			<b>35,074.50</b>	<b>85,074.50</b>	<b>85,074.50</b>	<b>85,074.50</b>	
	<b>Dwelling Structures</b>	<b>1460</b>		<b>14,104.50</b>	<b>14,104.50</b>	<b>14,104.50</b>	<b>14,104.50</b>	
	1. Elevator Repair			12,232.50	12,232.50	12,232.50	12,232.50	
	2. Emergency hinges-doors per fire code			1,872.00	1,872.00	1,872.00	1,872.00	
<b>WA19P005008</b>	<b>902 South L Street</b>							
	<b>Non-Dwelling Structures</b>	<b>1470</b>		<b>20,970.00</b>	<b>70,970.00</b>	<b>70,970.00</b>	<b>70,970.00</b>	
	1. 902 L Street Remodel-ADA door opener			2,070.00	2,070.00	2,070.00	2,070.00	Moved remain to 708/709
	2. 902 L Street HVAC/Tenant Improvments	<b>1470</b>			50,000.00	50,000.00	50,000.00	Partial work moved from 708
<b>WA19P005018</b>	<b>Hillside Terrace</b>							
	<b>Non-Dwelling Structures</b>							
	Remodel Site Based Office Property Mgmt	<b>1470</b>		18,900.00	18,900.00	18,900.00	18,900.00	Work from 2000 709
	a. Reconfigure walls, rooms							
	b. Remodel Bathrooms							
	c. Add window, door							
	<b>Non-Dwelling Equipment</b>	<b>1475</b>		<b>731.00</b>	<b>731.00</b>	<b>731.00</b>	<b>731.00</b>	
	Stove/Refrig for Prop Mgmt Site Office			731.00	731.00	731.00	731.00	
<b>WA19P005023</b>	<b>DIXON VILLAGE</b>	<b>1450</b>		<b>6,618.21</b>	<b>6,618.21</b>	<b>6,618.21</b>	<b>6,618.21</b>	
	Emergency lawn repair			6,618.21	6,618.21	6,618.21	6,618.21	
<b>PHA-WIDE</b>	<b>CONTINGENCY</b>	<b>1502</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	

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

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: <b>WA19P005-707</b> Replacement Housing Factor Grant No:					Federal FY of Grant <b>1998</b>
Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target De
	Original	Revised	Actual	Original	Revised	Actual	
THA-Wide Management Improvements	3/31/2000	12/31/2000	12/31/2000	9/30/2001	12/31/2001	12/31/2001	
WA19P005003 004-005-007 Salishan	3/31/2000	12/31/2000	12/31/2000	9/30/2001	12/31/2001	12/31/2001	
WA19P005006 911 N. "K" Street	3/31/2000	12/31/2000	12/31/2000	9/30/2001	12/31/2001	12/31/2001	
WA19P005006 M STREET 902 S. L St	3/31/2000	12/31/2000	12/31/2000	9/30/2001	12/31/2001	12/31/2001	
WA19P005009 3201 S. Fawcett	3/31/2000	12/31/2000	12/31/2000	9/30/2001	12/31/2001	12/31/2001	
WA19P005013 401 N. G STREET	3/31/2000	12/31/2000	12/31/2000	9/30/2001	12/31/2001	12/31/2001	
WA19P005020 BERGERSON	3/31/2000	12/31/2000	12/31/2000	9/30/2001	12/31/2001	12/31/2001	
WA19P005022 SCATTERED	3/31/2000	12/31/2000	12/31/2000	9/30/2001	12/31/2001	12/31/2001	
WA19P005024 SCATTERED	3/31/2000	12/31/2000	12/31/2000	9/30/2001	12/31/2001	12/31/2001	
WA19P005025 SCATTERED	3/31/2000	12/31/2000	12/31/2000	9/30/2001	12/31/2001	12/31/2001	

SUPPLEMENTAL INFORMATION TO 1998 ANNUAL STATEMENT

TACOMA HOUSING AUTHORITY

SOURCE OF NON-CGP FUNDS	<u>Amount</u>	<u>Distribution</u>
Section 8 Reimbursement to CGP for Admin. Bldg. (\$13,410 moved to 1999)	61,590.00	
To Fund Non Dwelling Equipment Needs		
- Two Step Vans for Maint. Use		47,790
To Account 1460          6th Avenue		<u>13,800</u>
		61,590
Drug Elimination Grant	7,007.00	
Site lighting at Bergerson Terrace		7,007.00
Environmental Justice Grant	30,000.00	
Heating Systems for Salishan		30,000.00
Youth Build Grant	14,392.00	
Salishan 2 single family units renovation		14,392.00
Value of credit for building materials issued by Allied Building Products	73,451.00	
To Account 1460 Bergerson Terrace		Moved to Bergerson Terrace Phase II    708 CGP
	<u>186,440.00</u>	<u>112,989.00</u>



**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary**

PHA Name:		Grant type and Numer		
Tacoma Housing Authority		Capital Fund Program Grant No: WA19P005-708		
		Replacement Housing Factor Grant No:		
<input type="checkbox"/>	Original Annual Statement	<input type="checkbox"/>	Reserve for Disasters/Emergencies	x
<input checked="" type="checkbox"/>	P&E Report for the Program Year Ending 12/31/01	Revised Annual Statement (revision no:4 )		
		Final Performance and Evaluation Report		
Line No.	Summary by Development Account	Total Estimated Cost		Obligat
		Orginal	Revised(1)	
1	Total Non-CGP Funds	283,611.00	357,062.00	35
2	1406 Operations (May not exceed 10% of line 19)	0.00	0.00	
3	1408 Management Improvements	224,364.60	213,957.54	21
4	1410 Administration	448,063.62	478,792.84	47
5	1411 Audit	5,000.00	0.00	
6	1415 Liquidated Damages	0.00	0.00	
7	1430 Fees and Costs	475,938.00	773,634.02	53
8	1440 Site Acquisition	0.00	0.00	
9	1450 Site Improvements	697,406.35	582,084.53	8
10	1460 Dwelling Structures	1,269,927.48	1,363,918.19	1,36
11	1465.1 Dwelling Equipment - Non Expendable	129,577.00	123,202.00	12
12	1470 Nondwelling Structures	917,113.74	626,209.57	27
13	1475 Nondwelling Equipment	112,831.65	114,535.71	11
14	1485 Demolition	186.25	186.25	
15	1490 Replacement Reserve	0.00	0.00	
16	1495.1 Relocation Costs	90,887.31	97,111.35	9
17	1498 Mod Used for Development	200,000.00	197,664.00	19
18	1502 Contingency (may not exceed 8% of line 19)	0.00	0.00	
19	Amount of Actual Grant (sum of lines 2 -15)	4,571,296.00	4,571,296.00	3,49
19	Amount of Actual Grant (sum of lines 2 -18)			
20	Amount of line 19 Related to LBP Activities	0.00	50,000.00	5
21	Amount of line 19 Related to Section 504 Compliance	80,000.00	80,000.00	8
22	Amount of line 19 Related to Security	100,000.00	100,000.00	10
23	Amount of line 19 Related to Energy Conservation Measures			
23	Collateralization Expenses or Debt Serrvoce			

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part II: Supporting Pages**

PHA Name: Tacoma Housing Authority						Federal FY of Grant <b>1999</b>	
Development Number/PHA-Wide Activities	Account Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
			Original	Revised	Funds Obligated	Funds Expended	
<b>PHA-WIDE OPERATIONS</b>	<b>1406</b>		0.00	0.00	0.00	0.00	
<b>PHA-WIDE MANAGEMENT IMPROVEMENTS</b>	<b>1408</b>		<b>224,364.60</b>	<b>213,957.54</b>	<b>213,957.54</b>	<b>187,813.44</b>	
1. Provide Staff Training & Education for Modernization Staff		9	14,381.87	14,877.86	14,877.86	14,877.86	
2. Security of residents PHA Wide			73,860.87	73,860.87	73,860.87	48,801.33	
3. Establishment and Implementation of an Economic Development Program PHA-wide			75,494.00	64,590.95	64,590.95	64,590.95	Partial moved to 2000 (501)
4. Technical Assistance for Resident Council Officers			0.00	0.00	0.00	0.00	
5. Family Support Services at Dixon Village, Bergerson, Hillside			46,957.86	46,957.86	46,957.86	45,873.30	
6. Computer Software for Modernization Staff			0.00	0.00	0.00	0.00	Moved to 2000 (501)
7. Database software to track information on revitalized units			0.00	0.00	0.00	0.00	Moved to 2000 (501)
8. Computer software - PHA-wide			1,195.00	1,195.00	1,195.00	1,195.00	
9. Records Management Assessment & Implementation			0.00	0.00	0.00	0.00	Moved to 2000 (501)
11. Upgrade prop. Mgmt. Staff skills to manage mod. Units			12,475.00	12,475.00	12,475.00	12,475.00	From 1998 (707)
12. Upgrade Preventative Maintenance Plan			0.00	0.00	0.00	0.00	Moved to 2000 (501)
<b>PHA-WIDE ADMINISTRATIVE COSTS</b>	<b>1410</b>		<b>448,063.64</b>	<b>478,792.84</b>	<b>478,792.84</b>	<b>366,557.96</b>	
1. Technical and Non-technical Salaries	1410.2		<b>207,380.00</b>	<b>200,112.49</b>	<b>200,112.49</b>	<b>148,696.84</b>	
EXECUTIVE DIRECTOR @ 2%		1	2,305.15	2,305.15			
PROP MANAGEMENT DIRECTOR @ 2%		1	1,782.91	1,782.91			
DIRECTOR OF REVITALIZATION @ 83%		1	66,092.80	58,825.29			
SR PROJECT MANAGER @ 100%		1	64,303.82	64,303.82			
MOD BUDGET COORD. @ 100%			-	-			Position Eliminated
MODERNIZATION CLERK MA-IV @ 100%		1	45,076.80	45,076.80			
MODERNIZATION CLERK MA-II @ 100%			-	-			Position Eliminated
ADMIN. SECRETARY @ 50%			-	-			Position Eliminated

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part II: Supporting Pages**

PHA Name: Tacoma Housing Authority						Federal FY of Grant 1999		
Development Number/PHA-Wide Activities	Account Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work	
			Original	Revised	Funds Obligated	Funds Expended		
	FINANCE DIRECTOR @ 5%	1	3,331.42	3,331.42				
	MA-IV ACCT @ 6%	1	2,996.21	2,996.21				
	MA-IV ACCT @ 11%	1	5,493.26	5,493.26				
	ASSET MGR @ 5%		-	-				
	PURCHASING ASST. @ 5%	1	2,207.99	2,207.99				
	MA-IV PAYROLL CLERK @ 5%	1	2,497.05	2,497.05				
	HR ASSISTANT @ 9%	1	4,805.84	4,805.84				
	MIS MANAGER @ 15%		-	-				
	MIS SPECIALIST MA-IV @ 15%	1	6,486.74	6,486.74				
<i>NON CGP FUNDS</i>	<i>Project Mgr/Mod Manager</i>	<i>2</i>	<i>11,250.00</i>	<i>11,250.00</i>	<i>11,250.00</i>	<i>11,250.00</i>		
<i>Youth Build Grant</i>								
	2. Employee Benefits (40% of salaries)	1410.9	17	102,941.42	136,062.27	136,062.27	89,198.62	
	3. Publication of CGP Materials	1410.14		912.53	912.53	912.53	912.53	
	4. Sundry Expenses (Advertising)	1410.19		103,114.19	110,013.25	110,013.25	97,026.07	
	5. Legal	1410.4		10,000.00	10,000.00	10,000.00	10,000.00	
	9. Maintenance & fuel for mod. Vehicles		4	2,125.28	2,125.28	2,125.28	1,156.88	
	6. Copier Maintenance	141018	1	2,830.64	2,830.64	2,830.64	2,830.64	
	7.Unemployment benefits	1410.9	3	18,759.58	16,736.38	16,736.38	16,736.38 From Downsizing Mod staff	
<b>PHA-WIDE</b>	<b>AUDIT</b>	<b>1411</b>		<b>5,000.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>PHA-WIDE</b>	<b>FEES AND COSTS</b>	<b>1430</b>		<b>475,938.00</b>	<b>773,634.02</b>	<b>539,432.98</b>	<b>449,365.11</b>	
	A/E fees for Salishan and Hillside Terrace	1430.1		-	24,248.49	1,954.10	1,954.10 Remaining work trans to 709	
	A/E Fee Hillside Terrace			-	37,230.83	18,023.31	18,023.31	
	A/E fees Bergerson Terrace/Scattered sites			245,143.00	250,064.00	216,853.00	126,785.13	
	A&E Fees Admin Bldg			15,302.00	56,076.26	36,079.58	36,079.58	
	A & E Fees 6th Avenue			8,878.00	60,368.73	57,925.28	57,925.28	
	Civil design planning			75,238.00	75,238.00	74,165.00	74,165.00	
	Consulting fees	1430.2		50,000.00	197,361.90	62,227.47	62,227.47 Trans work from 709	
	Fees & Permits for non-residential	1430.6		9,220.82	7,394.70	7,394.70	7,394.70	
	Inspection Cost	1430.7		61,877.00	55,371.93	55,371.93	55,371.93	
	Sundry Expenses (Reproduction)	1430.19		10,279.18	10,279.18	9,438.61	9,438.61	
<b>PHA-WIDE</b>	<b>NON-DWELLING EQUIPMENT</b>	<b>1475</b>		<b>112,831.65</b>	<b>114,535.71</b>	<b>114,535.71</b>	<b>86,065.17</b>	
	1. Common-area furniture Fawcett Sr Bldg			4,232.38	0.00	0.00	0.00	

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part II: Supporting Pages**

PHA Name: Tacoma Housing Authority						Federal FY of Grant 1999	
Development Number/PHA-Wide Activities	Account Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
			Original	Revised	Funds Obligated	Funds Expended	
	3. Computer Equip for Modernization Staff	9	7,500.00	5,175.57	5,175.57	4,962.47	
	4. Laptop computer for Revitalization	2	6,492.31	6,492.31	6,492.31	6,492.31	
	5. Telephone system upgrade		10,000.00	3,700.00	3,700.00	3,700.00	
	6. Computerized blueprint archiving	1	0.00	0.00	0.00	0.00	Moved to future CGP
	2. Computer equipment - PHA-wide		68,882.96	87,403.25	87,403.25	59,145.81	
	7. Color printer for Modernization Staff	1	2,500.00	848.42	848.42	848.42	
	8. Tools and Equipment for Mod Staff		105.00	105.00	105.00	105.00	
	9. Fax machine for Bergerson Field Office	1	1,114.00	1,114.00	1,114.00	1,114.00	From Mgmt Needs Assess.
	10. Purchase common area furniture Northt G		4,670.98	0.00	0.00	0.00	Moved partial from 707
	11. Comp. Staff Furniture		1,549.22	3,451.28	3,451.28	3,451.28	Moved partial from 707
	12. Tools and Equipment for remote sites		784.80	784.80	784.80	784.80	Moved partial from 706
	13. Purchase common area furniture K Street		5,000.00	3,466.08	3,466.08	3,466.08	Moved from 707
	14. Stove & Range Bergerson Comm Room		0.00	705.00	705.00	705.00	
	15. Washer & Dryers 6th Ave Laundry Room		0.00	1,290.00	1,290.00	1,290.00	
<i>Non CGP Funds</i>	<i>Hydro Machine for Maintenance</i>	<i>1</i>	<i>3,500.00</i>	<i>3,500.00</i>	<i>3,500.00</i>	<i>3,500.00</i>	<i>From 707 1998</i>
	<i>Sewer Viedo Camera</i>	<i>1</i>	<i>2,500.00</i>	<i>2,500.00</i>	<i>2,500.00</i>	<i>2,500.00</i>	<i>From 707 1998</i>
	<i>52" Walk Behind Mower</i>	<i>1</i>	<i>5,200.00</i>	<i>5,200.00</i>	<i>5,200.00</i>	<i>5,200.00</i>	<i>From 707 1998</i>
<b>PHA-WIDE</b>	<b>RELOCATION COSTS</b>	<b>1495</b>	<b>90,887.31</b>	<b>97,111.35</b>	<b>97,111.35</b>	<b>85,830.70</b>	
<b>WA19P005004</b>	<b>SALISHAN</b>						
	<b>Demolition</b>	<b>1485</b>	<b>186.25</b>	<b>186.25</b>	<b>186.25</b>	<b>186.25</b>	Work moved from 1997 cgp
	<b>Emergency Lawn Repair FIC</b>	<b>1450</b>	<b>1,356.65</b>	<b>1,356.65</b>	<b>1,356.65</b>	<b>1,356.65</b>	
<b>WA19P005008</b>	<b>902 SOUTH L STREET - ADMIN REMODEL</b>	<b>1470</b>	<b>310,190.00</b>	<b>246,266.85</b>	<b>246,266.85</b>	<b>56,881.00</b>	From Mgmt Needs Assess.
	<b>Non-Dwelling Structures</b>						
	Upgrade HVAC, insulate walls, replace windows, improve ventilation						
	<i>Section 8 portion</i>		<i>0.00</i>	<i>150,000.00</i>	<i>0.00</i>	<i>0.00</i>	
	<i>Portion of HVAC upgrade, insulate walls, reconfigure space</i>						

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part II: Supporting Pages**

PHA Name: Tacoma Housing Authority						Federal FY of Grant <b>1999</b>	
Development Number/PHA-Wide Activities	Account Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
			Original	Revised	Funds Obligated	Funds Expended	
<b>WA19P005018</b>	<b>HILLSIDE TERRACE</b>						
	<b>Site Improvements</b>	<b>1450</b>	<b>29.29</b>	<b>29.29</b>	<b>29.29</b>	<b>29.29</b>	Moved to future 501-00 grants
	1. Rough and finish grading						
	2. Hydroseeding						
	3. Replace sidewalks and entryways						
	4. Install new parking lot with speed bumps						
	5. Stripe parking lot						
	6. Create bike paths						
	7. Install dumpster pads and enclosures						
	8. Install perimeter fencing, secured mailboxes, litter containers						
	9. Increase site lighting						
	10. Replace benches and tables, playground equipment, basketball court						
	11. Replace water and sewer lines						
	12. Install storm drains						
<b>WA19P005018</b>	<b>HILLSIDE TERRACE</b>						
	<b>Dwelling Structures</b>	<b>1460</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	Moved to Future CGP
	1. Replace heaters, stair handrails, closet doors, window coverings.						
	2. Insulate walls, lower ceilings, upgrade bathrooms						
	3. Replace kitchen cabinets, countertops, sinks, faucets						
<b>WA19P005018</b>	<b>HILLSIDE TERRACE - Site Office</b>						
	<b>Non-Dwelling Structures</b>	<b>1470</b>	<b>12,919.00</b>	<b>12,710.00</b>	<b>12,710.00</b>	<b>12,710.00</b>	
	1. Repair dry rot, damaged hose bibs, drywall						
	2. Add locking security window, change door						
<b>WA19P005020</b>	<b>BERGERSON TERRACE</b>		<b>1,215,843.41</b>	<b>945,381.31</b>	<b>83,639.41</b>	<b>79,028.56</b>	Worked moved from 1997
	<b>Site Improvements</b>	<b>1450</b>	<b>693,470.41</b>	<b>578,148.59</b>	<b>83,639.41</b>	<b>79,028.56</b>	
	1. Install parking lot lighting, landscaping, add parking stalls. (Includes items 1 thru 6)		0.00	136,879.18	0.00	0.00	
	2. Grade, overlay, and re-stripe parking lot						

**Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)  
 Part II: Supporting Pages**

PHA Name: Tacoma Housing Authority						Federal FY of Grant 1999	
Development Number/PHA-Wide Activities	Account Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
			Original	Revised	Funds Obligated	Funds Expended	
	3. Replace sidewalks						
	4. Install playground equipment						
	5. Dig out area around existing community room to prevent roof access						
	6. Retaining walls, fencing						
	Phase I Site Work		0.00	83,639.41	83,639.41	81,053.00	
	Site Work for Maint Bldg-Phase II		0.00	357,630.00			
	<b>Dwelling Structures</b>						
	Siding & Windows	1460	0.00	15,958.13	15,958.13	15,958.13	Partial from 2000 (501)
	<i>Section 8 - \$75,000+ 2,210.</i>	1450	77,210.00	77,210.00	0.00	0.00	13410 from 1998
	<i>Allied Building Products Credit</i>	1450	0.00	73,451.00	0.00	0.00	From 707 1998
	<b>Dwelling Equipment</b>	1465	49,758.00	46,515.00	46,515.00	3,132.00	
	Replace Stoves and Refrigerators Bergerson		72	49,758.00	46,515.00	46,515.00	3,132.00 From Physical Needs Assess
	<b>Non-Dwelling Structures</b>	1470	522,373.00	367,232.72	16,046.16	0.00	
	Expand community room - Bergerson		50,000.00	16,046.16	16,046.16	0.00	From Mgmt Needs Assess.
	On site maintenance/property mgmt office Bergerson		472,373.00	351,186.56	0.00	0.00	From Mgmt Needs Assess.
<b>WA19P005014</b>	<b>2302 6th AVE - Modernization</b>			1,194,200.71	1,267,261.29	1,267,261.29	1,233,263.84
	Comprehensive interior Modernization	1460	43 units	1,191,650.71	1,264,711.29	1,264,711.29	1,233,263.84 From 2000 CPG
	j. Upgrade apartment entry doors						
	k. Replace lights, switches, electrical outlets and phone jacks						
	l. Replace kitchen counter tops, sinks and faucets						
	m. Repaint apart. Interiors and replace kitchen cabinets and interior doors						
	n. Replace range hoods						
	o. Replace bathroom vanity, sinks and faucets and shower heads						

**Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)  
 Part II: Supporting Pages**

PHA Name: Tacoma Housing Authority						Federal FY of Grant <b>1999</b>	
Development Number/PHA-Wide Activities	Account Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
			Original	Revised	Funds Obligated	Funds Expended	
	p. Replace window coverings						
	q. Replace floor coverings						
	z. Install garbage disposals						
	<b>Dwelling Equipment</b>	<b>1465</b>	<b>30,331.00</b>	<b>27,209.00</b>	<b>27,209.00</b>	<b>27,209.00</b>	
	Stoves and Refrigerators		30,331.00	27,209.00	27,209.00	27,209.00	
	<b>Site Improvements</b>	<b>1450</b>	<b>2,550.00</b>	<b>2,550.00</b>	<b>2,550.00</b>	<b>0.00</b>	From 1998 CPG
	Portion of site drainage						
<b>WA19P005027</b>	<b>Add 4 dwelling units to 6th Avenue</b>	<b>1498</b>	<b>200,000.00</b>	<b>197,664.00</b>	<b>197,664.00</b>	<b>170,000.00</b>	From 2000 CPG
<b>WA19P005008</b>	<b>1202 South M Street/902 S. L St</b>		<b>49,488.00</b>	<b>49,478.00</b>	<b>49,478.00</b>	<b>49,478.00</b>	
	Replace Stoves and Refrigerators/M Street	<b>1465</b>	77 Apts 49,488.00	49,478.00	49,478.00	49,478.00	From Physical Needs Assess.
<b>WA19P005026</b>	<b>SALISHAN</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	
	<b>Development 1 - Faris Drive</b>						
	Mod Funds Used For Development	<b>1498</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	Worked moved to 2001 w/ HOPEVI
	<b>SCATTERED SITES</b>	<b>1460</b>	<b>60,678.00</b>	<b>60,678.00</b>	<b>60,678.00</b>	<b>60,678.00</b>	
<b>WA19P005024</b>	<b>2146 Sheridan</b>	1460	37,755.00	37,755.00	37,755.00	37,755.00	Work moved from 707/1998
	Replace roof, paint interior, replace windows, replace tub surround, replace mold damaged sheetrock						
<b>WA19P005022</b>	<b>6750 East B</b>	1460	22,923.00	22,923.00	22,923.00	22,923.00	
	Renovate kitchen complete						
<i>Non CGP funds</i>	<i>Sheridan</i>	<i>1450</i>	<i>33,951.00</i>	<i>33,951.00</i>	<i>33,951.00</i>	<i>33,951.00</i>	
<i>Youth Build Grant</i>	<i>Remov/replace foundation</i>						
<b>WA19P005009</b>	<b>3201 South Fawcett</b>	<b>1460</b>	<b>17,598.77</b>	<b>22,570.77</b>	<b>22,570.77</b>	<b>22,570.77</b>	
	Replace range hoods, repoace bath sink/faucets, replace window coverings		30 units 17,598.77	22,570.77	22,570.77	22,570.77	

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)**  
**Part II: Supporting Pages**

PHA Name: Tacoma Housing Authority						<b>Federal FY of Grant</b> <b>1999</b>		
Development Number/PHA- Wide Activities		Account Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
<b>PHA-WIDE</b>	<b>CONTINGENCY</b>	<b>1502</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	



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

PHA Name: Tacoma Housing Authority		Grant type and Number Capital Fund Program Grant No: <b>WA19P005-708</b> Replacement Housing Factor Grant No:					Federal FY of Grant <b>1999</b>
Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
THA-Wide	3/31/2001	12/3/2001		9/30/2002	9/30/2002		
Management Improvements							
WA19P005020 Bergerson	3/31/2001	1/30/2002		9/30/2002	9/30/2002		Self Extended due to bid pending litigation.
WA19P005018 Hillside Terrace	3/31/2001	9/30/2001	9/30/2001	9/30/2002	9/30/2001	9/30/2001	
WA19P005026 WA19P005004 Salishan	3/31/2001	N/A	N/A	N/A	N/A	N/A	
WA19P005024 WA19P005022 Scattered sites	3/31/2001	9/30/2001	9/30/2001	9/30/2002	12/31/2001	12/31/2001	
WA195005014 6th Avenue	3/31/2001	12/31/2000	12/31/2000	9/30/2002	12/31/2001	12/31/2001	
WA195005009 3202 Fawcett	3/31/2001	12/31/2000	12/31/2000	9/30/2002	12/31/2001	12/31/2001	

SUPPLEMENTAL INFORMATION TO 1999 ANNUAL STATEMENT

TACOMA HOUSING AUTHORITY

SOURCE OF NON-CGP FUNDS	Amount	Distribution
Section 8 Reimbursement to CGP for Admin. Bldg. To Account 1450 Bergerson Terrace Phase II	75,000.00	75,000.00
Section 8 Reimbursement to CGP Moved from 1998 To Fund Non Dwelling Equipment Needs	11,200.00	
- Hydro Machine		3,500.00
- Sewer Video Camera		2,500.00
- 52" Walk Behind Mower		5,200.00
		<u>11,200.00</u>
Section 8 Reimbursement to CGP Moved from 1998 (Remaining from Step Vans) To Account 1460 Bergerson Terrace Phase II	2,210.00	2,210.00
Section 8 Portion of Admin. Bldg Remodel	150,000.00	150,000.00
Youth Build Grant To Account 1450 Sheridan Wages Project Manager/Mod. Manager	45,201.00	33,951.00 <u>11,250.00</u> 45,201.00
Allied Building Materials Credit for Bergerson Terrace Phase II	73,451.00	<u>73,451.00</u>
Total	<u>357,062.00</u>	<u>357,062.00</u>

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name:		Grant type and Numer		FFY Grant Approval	
Tacoma Housing Authority		Capital Fund Program Grant No: WA19P005501-00		2000	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies		Replacement Housing Factor Grant No:			
<input checked="" type="checkbox"/> P&E Report for the Program Year Ending _12/31/2001_		Revised Annual Statement (revision no: 3 )			
		Final Performance and Evaluation Report		12/31/2001	

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Orginal	Revised	Obligated	Expended
1	Total non-CGP Funds	75,000.00	75,000.00	0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)	865,358.00	865,358.00	865,358.00	865,358.00
3	1408 Management Improvements Soft Costs	412,931.74	398,641.33	196,957.72	145,988.34
	Management Improvements Hard Costs				
4	1410 Administration	379,196.00	402,526.15	329,876.74	287,554.13
5	1411 Audit	5,000.00	5,000.00	0.00	0.00
7	1430 Fees and Costs	400,011.00	284,068.18	61,517.00	45,478.34
8	1440 Site Acquisition	0.00	0.00	0.00	0.00
9	1450 Site Improvements	621,062.26	624,120.74	0.00	0.00
10	1460 Dwelling Structures	1,322,410.00	1,275,009.16	537,715.76	249,787.58
11	1465.1 Dwelling Equipment - Non Expendable	21,000.00	21,000.00	21,000.00	0.00
12	1470 Nondwelling Structures	20,000.00	171,245.44	163,045.44	0.00
13	1475 Nondwelling Equipment	29,825.00	29,825.00	19,825.00	19,825.00
14	1485 Demolition	0.00	0.00	0.00	0.00
15	1490 Replacement Reserve	0.00	0.00	0.00	0.00
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	50,000.00	50,000.00	3,219.52	3,118.10
18	1499 Development Activities	200,000.00	200,000.00	0.00	0.00
19	1502 Contingency	0.00	0.00	0.00	0.00
#	Amount of Actual Grant (sum of lines 2 -18)	4,326,794.00	4,326,794.00	2,198,515.18	1,617,109.49
#	Amount of line 19 Related to LBP Activities				
#	Amount of line 19 Related to Section 504 Compliance				
#	Amount of line 19 Related to Security	90,000.00	90,000.00	90,000.00	82,636.21
#	Amount of line 19 Related to Energy Conservation Measures				

**Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary  
 Part II: Supporting Pages**

PHA Name: Tacoma Housing Authority						Federal FY of Grant 2000		
Development Number/PHA-Wide Activities	General Description of Major Wrok Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
<b>PHA-WIDE</b>	<b>OPERATIONS</b>	<b>1406</b>		<b>865,358.00</b>	<b>865,358.00</b>	<b>865,358.00</b>	<b>865,358.00</b>	
<b>PHA-WIDE</b>	<b>MANAGEMENT IMPROVEMENTS</b>	<b>1408</b>		<b>412,931.74</b>	<b>398,641.33</b>	<b>196,957.72</b>	<b>145,988.34</b>	
	1. Provide Staff Training & Education for		5	16,160.43	16,160.43	15,176.69	6,298.66	
	2. Security of Residents PHA Wide			90,000.00	90,000.00	90,000.00	66,098.62	
	3. Establishment and Implementation of an Economic Development Program PHA-wide			173,806.00	173,806.00	57,720.70	57,720.70	
	4. Family Support Services at Dixon Village,			40,700.00	40,700.00	34,060.33	15,870.36	
	5. Purchase Records Management System			10,000.00	10,000.00	0.00	0.00	
	6. Computer software - PHA-wide - CFP portion			42,265.31	27,974.90	0.00	0.00	
	7. Records Management Assess & Implem			16,500.00	16,500.00	0.00	0.00	From CGP 1999 (708)
	8. Upgrade Preventative Management Plan			17,000.00	17,000.00	0.00	0.00	From CGP 1999 (708)
	9. Data Base Software Track Revit units			1,500.00	1,500.00	0.00	0.00	From CGP 1999 (708)
	10. Computer Software Modernization Staff			5,000.00	5,000.00	0.00	0.00	From CGP 1999 (708)
<b>PHA-WIDE</b>	<b>ADMINISTRATIVE COSTS</b>	<b>1410</b>		<b>379,196.00</b>	<b>402,526.15</b>	<b>329,876.74</b>	<b>287,554.13</b>	
	1. Technical and Non-technical Salaries	1410.2		<b>242,997.00</b>	<b>242,997.00</b>	<b>242,997.00</b>	<b>205,789.73</b>	
	EXECUTIVE DIRECTOR @ 10%		1	9,490.00	9,490.00			
	PROP MANAGEMENT DIRECTOR @ 10%		1	7,342.00	7,342.00			
	DIRECTOR OF Mod & Econ dev @ 100%		1	65,000.00	65,000.00			
	MODERNIZATION MANAGER @ 100%		1	52,946.00	52,946.00			
	MODERNIZATION COORDINATOR @ 100%		1	50,279.00	50,279.00			
	MODERNIZATION CLERK MA-IV @ 100%		1	37,115.00	37,115.00			
	FINANCE DIRECTOR @ 10%		1	5,484.00	5,484.00			
	FINANCE COORDINATOR @ 25%		1	10,000.00	10,000.00			
	MIS SPECIALIST MA-IV @ 15%		1	5,341.00	5,341.00			
	2. Employee Benefits (40% of salaries)	1410.9		<b>97,199.00</b>	<b>97,199.00</b>	<b>58,233.88</b>	<b>57,940.94</b>	
	3. Publication of CGP Materials	1410.14		<b>7,000.00</b>	<b>3,648.17</b>	<b>67.50</b>	<b>67.50</b>	
	4. Sundry Expenses (Advertising)	1410.19		<b>10,000.00</b>	<b>33,330.15</b>	<b>10,414.54</b>	<b>8,468.38</b>	
	5. Legal	1410.4		<b>15,000.00</b>	<b>15,000.00</b>	<b>14,811.99</b>	<b>11,935.75</b>	
	6. Fuel for Mod Vehicles			<b>3,500.00</b>	<b>3,500.00</b>	<b>0.00</b>	<b>0.00</b>	
	7. Copier Manitenance			<b>3,500.00</b>	<b>6,851.83</b>	<b>3,351.83</b>	<b>3,351.83</b>	Moved from CGP 1999 (708)

**Annual Statement/Performance and Evaluation Report  
 Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary  
 Part II: Supporting Pages**

PHA Name: Tacoma Housing Authority						Federal FY of Grant 2000		
Development Number/PHA-Wide Activities	General Description of Major Wrok Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
<b>PHA-WIDE</b>	<b>AUDIT</b>	<b>1411</b>		<b>5,000.00</b>	<b>5,000.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>PHA-WIDE</b>	<b>FEES AND COSTS</b>	<b>1430</b>		<b>400,011.00</b>	<b>284,068.18</b>	<b>61,517.00</b>	<b>45,478.34</b>	
	1. A/E fees for Salishan and Hillside Terrace	1430.1		265,634.00	106,825.18	0.00	0.00	
	2. A/E fees for Bergerson Terrace	1430.1		5,000.00	5,000.00	2,540.00	0.00	Moved to CGP 1999 (708)
	4. Consulting fees	1430.2		50,000.00	50,000.00	0.00	0.00	
	5. Fees & Permits for non-residential	1430.6		11,000.00	11,000.00	0.00	0.00	
	6. Inspection Cost	1430.7		58,377.00	88,377.00	58,377.00	45,478.34	
	7. Sundry Expenses (Reproduction)	1430.19		10,000.00	10,000.00	600.00	0.00	
	8 A/E Admin Bldg 902 South L	1430.1		0.00	5,820.00	0.00	0.00	
	9 A/E Fees for M Street	1430.2		0.00	7,046.00	0.00	0.00	
<b>PHA-WIDE</b>	<b>NON-DWELLING EQUIPMENT</b>	<b>1475</b>		<b>5,000.00</b>	<b>5,000.00</b>	<b>0.00</b>	<b>0.00</b>	
	Tools and Equipment for Force Account Crew			0.00	0.00	0.00	0.00	
	Computer Equip. for Mod Staff		1	5,000.00	5,000.00	0.00	0.00	
<b>PHA-WIDE</b>	<b>RELOCATION COSTS</b>	<b>1495</b>		<b>50,000.00</b>	<b>50,000.00</b>	<b>3,219.52</b>	<b>3,118.10</b>	
<b>WA19P005009</b>	<b>FAWCETT SENIOR APTS</b>	<b>1450</b>		<b>0.00</b>	<b>3,344.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>WA19P005020</b>	<b>BERGERSON TERRACE</b>	<b>1450</b>		<b>596,062.26</b>	<b>620,776.74</b>	<b>0.00</b>	<b>0.00</b>	
	<b>Site Improvements</b>							
	Water proof foundation walls, regrade site, erosion control, renovate playground, site lighting, security			596,062.26	620,776.74	0.00	0.00	
	<b>Bergerson Terrace Foundation</b>							
	<i>Section 8 \$75,000</i>		<i>21 units</i>	<i>75,000.00</i>	<i>75,000.00</i>	<i>0.00</i>	<i>0.00</i>	
	<b>DWELLING STRUCTURES</b>	<b>1460</b>		<b>40,000.00</b>	<b>3,862.08</b>	<b>3,862.08</b>	<b>3,862.08</b>	
	Porch Lights		77 units	3,862.08	3,862.08	3,862.08	3,862.08	
	Dry Rot Repair and Replacement		44 units	35,737.92	0.00	0.00	0.00	Moved to 707 1998
	Dryer Vent Replacement		36 units	400.00	0.00	0.00	0.00	Moved to 707 1998
	<b>NON DWELLING STRUCTURE</b>	<b>1470</b>		<b>20,000.00</b>	<b>171,245.44</b>	<b>163,045.44</b>	<b>0.00</b>	

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary**  
**Part II: Supporting Pages**

PHA Name: Tacoma Housing Authority						Federal FY of Grant 2000		
Development Number/PHA-Wide Activities	General Description of Major Wrok Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	Siding & Windows in Community Rm			20,000.00	0.00	0.00	0.00	work moved to 1999 (709)
	Maint Bldg & Property Mgmt Office			0.00	171,245.44	163,045.44	0.00	
<b>WA19P005014</b>	<b>6th AVENUE MODERNIZATION</b>			<b>365,501.90</b>	<b>329,171.12</b>	<b>304,386.91</b>	<b>164,115.26</b>	
	<b>Site Improvements</b>	<b>1450</b>		<b>25,000.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	Moved to 707 1998
	1. Install additional site lighting			25,000.00	0.00	0.00	0.00	
	2. Install perimeter fencing							
	3. Install site subdrainage							
	4. Upgrade parking lot							
	5. Re-landscape							
	6. Replace exterior sanitary sewer							
	7. Install H/C ramp at common room door							
<b>WA19P005014</b>	<b>6th Avenue Modernizaiton</b>							
	<b>Dwelling Structures</b>	<b>1460</b>	10 units	<b>294,676.90</b>	<b>283,346.12</b>	<b>263,561.91</b>	<b>144,290.26</b>	
	Comprehensive interor Modernization			294,676.90	283,346.12	263,561.91	144,290.26	Portion work moved to 1999 (708)
	a. Upgrade common area restrooms							
	b. Upgrade stairwells, c. upgrade boiler							
	d. Upgrade elevator/add elevator							
	e. Install fire sprikler system, f. Upgrade fire alarm							
	g. Install emergency generator							
	h. Renovate laundry room							
	i. Replace hall carpet							
	j. Upgrade apartment entry doors							
	k. Replace lights, switches, electrical outlets and phone jacks							
	l. Replace kitchen counter tops, sinks and faucets							
	m. Repaint apart. Interiors and replace kitchen cabinets and interior doors							
	n. Replace range hoods.							
	o. Replace bathroom, faucets, shower valves							
	p. Replace window coverings							
	q. Replace floor coverings							
	r. Replace roofing							

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary**  
**Part II: Supporting Pages**

PHA Name: Tacoma Housing Authority						Federal FY of Grant 2000		
Development Number/PHA-Wide Activities	General Description of Major Wrok Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	s. Renovate office area/add resident mgr office							
	t. Install corridor handrails							
	u. Renovate community rooms, corridors, lobby							
	v. Renovate ramps (ADA Approved)							
	w, Create 2nd laundry on 3rd floor							
	x. Repair window framing							
	y. Install storage shelves at common areas							
	z. Install garbage disposals							
	aa. Renovate HVAC (office)							
	ab. Upgrade Ventilation system							
	ae. Replace toilets, faucets and shower lever handles							
	<b>DWELLING EQUIPMENT</b>	<b>1465</b>		<b>21,000.00</b>	<b>21,000.00</b>	<b>21,000.00</b>	<b>0.00</b>	
	Replace stoves and refrigerators.		21 units	21,000.00	21,000.00	21,000.00	0.00	
	<b>NON DWELLING EQUIPMENT</b>	<b>1475</b>		<b>24,825.00</b>	<b>24,825.00</b>	<b>19,825.00</b>	<b>19,825.00</b>	
	Washers/Dryers 6th Ave Sr Bldg			19,825.00	19,825.00	19,825.00	19,825.00	Needs assessment
	Common-area furniture for 6th Ave Sr Bldg			5,000.00	5,000.00	0.00	0.00	
<b>WA19P05007</b>	<b>Salishan Emergency Roofing Project</b>	<b>1460</b>		<b>269,249.45</b>	<b>268,628.01</b>	<b>268,628.01</b>	<b>99,971.48</b>	
<b>WA19P00518</b>	<b>HILLSIDE TERRACE</b>							
	- DWELLING STRUCT	<b>1460</b>	27 units	<b>716,819.89</b>	<b>716,819.19</b>	<b>0.00</b>	<b>0.00</b>	
	Interior Revitalization			716,819.89	716,819.19	0.00	0.00	
	1. Replace heaters, stair handrails, closet doors,							
	2. Insulate walls, lower ceilings, upgrade							
	3. Replace kitchen cabinets, countertops, sinks,							
	4. Repaint interiors, new floor coveings throughout							
	5. Reconfigure units							
<b>WA19P005003</b>	<b>SALISHAN - NON-DWELLING STRUCTURES</b>	<b>1470</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	Moved to future CGP
	Maintenance Facility-							

**Annual Statement/Performance and Evaluation Report**  
**Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary**  
**Part II: Supporting Pages**

PHA Name: Tacoma Housing Authority						Federal FY of Grant 2000		
Development Number/PHA-Wide Activities	General Description of Major Wrok Categories	Dev Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	A. Remodel to accommodate site based Prop. Mgmt							
	1. Add windows, floor covering							
	2. Add bathroom, conference room							
	3. Add walls for managers offices							
	<b>SALISHAN/SCATTERED SITES</b>	<b>1460</b>		<b>1,663.76</b>	<b>1,663.76</b>	<b>1,663.76</b>	<b>1,663.76</b>	
	3812 East R St-piping/ductwork/crawl space							
<b>WA19P005008</b>	<b>1202 South M Street</b>	<b>1460</b>		<b>0.00</b>	<b>350.00</b>	<b>0.00</b>	<b>0.00</b>	
	Repair wall damage							
	<b>902 South L Admin Bldg</b>	<b>1460</b>		<b>0.00</b>	<b>340.00</b>	<b>0.00</b>	<b>0.00</b>	
	Data lines for computers							
<b>WA19P005018</b>	<b>HILLSIDE TERRACE NON-DWELLING STRUCTURES</b>	<b>1470</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	Work moved to CGP 1998 (707)
	A. Remodel non dwelling structure to accommodate site based Prop. Mgmt				0.00	0.00	0.00	
	<b>MOD FUNDS USED FOR DEVELOPMENT</b>	<b>1499</b>		<b>200,000.00</b>	<b>200,000.00</b>	<b>0.00</b>	<b>0.00</b>	
<b>WA19P005027</b>	Add 4 dwelling units at 2302 6th Ave			0.00	0.00	0.00	0.00	Moved work to CGP 1999 (708)
	Hillside Terrace - acquire additional property			200,000.00	200,000.00	0.00	0.00	
<b>PHA-WIDE</b>	<b>CONTINGENCY</b>	<b>1502</b>		<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	





SUPPLEMENTAL INFORMATION TO 2000 ANNUAL STATEMENT

TACOMA HOUSING AUTHORITY

SOURCE OF NON-CGP FUNDS

AMOUNT

Section 8 Reimbursement to CGP for Admin. Bldg.

75,000.00 Bergerson Terrace 1450

Annual Statement/Performance and Evaluation Report					
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary					
PHA Name: Tacoma Housing Authority		Grant type and Numer Capital Fund Program Grant No: WA19P00550101 Replacement Housing Factor Grant No:		FFY of Grant Approval <b>2001</b>	
<input type="checkbox"/>	Original Annual Statement	<input type="checkbox"/>	Reserve for Disasters/Eme	Revised Annual Statement (revision no: )	
<input checked="" type="checkbox"/>	Performance&Evaluation Report-Program Y/E 12/31/01	<input type="checkbox"/>	Final Performance and Evaluation Report		
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-CGP Funds	84,900.00		0.00	0.00
2	1406 Operations (May not exceed 20% of line 19)	432,679.00		0.00	0.00
3	1408 Management Improvements - Soft Costs	307,800.00		0.00	
	Management Improvements - Hard Costs				
4	1410 Administration	381,103.00		0.00	0.00
5	1411 Audit	5,000.00		0.00	0.00
6	1415 Liquidated Damages	0.00		0.00	0.00
7	1430 Fees and Costs	399,019.00		0.00	0.00
8	1440 Site Acquisition	.00		0.00	0.00
9	1450 Site Improvements	534,074.00		0.00	0.00
10	1460 Dwelling Structures	2,145,413.00		0.00	0.00
11	1465.1 Dwelling Equipment - Non Expendable	52,000.00		0.00	0.00
12	1470 Nondwelling Structures	0.00		0.00	0.00
13	1475 Nondwelling Equipment	20,000.00		0.00	0.00
14	1485 Demolition			0.00	0.00
15	1490 Replacement Reserve	0.00		0.00	0.00
16	1495.1 Relocation Costs	20,000.00		0.00	0.00
17	1499 Development Activities	0.00		0.00	0.00
18	1502 Contingency (may not exceed 8% of line 19)	0.00		0.00	0.00
	Amount of Annual Grant (sum of lines 2 -18)	4,297,088.00		0.00	0.00
	Amount of line 19 Related to LBP Activities				
	Amount of line 19 Related to Section 504 Compliance				
	Amount of line 19 Related to Security-Soft costs	90,000.00			
	Amount of line 19 Related to Security-Hard costs				
	Amount of line 19 Related to Energy Conservation Measures				
	Collateralization Expenses or Debt Service				

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# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

### Part II: Supporting Pages

PHA Name:		Grant type and Number				Federal FY of Grant		
Tacoma Housing Authority		Capital Fund Program Grant No: <b>WA19P00550101</b>				2001		
		Replacement Housing Factor Grant No:						
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		
				Original	Revised	Funds Obligated	Funds Expended	
<b>PHA-WIDE</b>	<b>OPERATIONS</b>	<b>1406</b>		<b>432,679</b>				
<b>PHA-WIDE</b>	<b>MANAGEMENT IMPROVEMENTS</b>	<b>1408</b>		<b>307,800</b>				
	1. Provide Staff Training & Education for Modernization Staff		5	7,500				
	2. Security patrol of residents PHA Wide			90,000				
	3. Establishment and Implementation of an Economic Development Program PHA-wide			122,300				
	4. Coordination of Family Support Services at			43,000				
	5. Purchase Records Management System			10,000				
	6. Training for resident Council Officers			10,000				
	7. Computer software - PHA-wide - CFP portion			25,000				
<b>PHA-WIDE</b>	<b>ADMINISTRATIVE COSTS</b>	<b>1410</b>		<b>381,103</b>				
	1. Technical and Non-technical Salaries	1410.2		<b>246,859</b>				
	EXECUTIVE DIRECTOR @ 10%		1	9,490				
	PROP MANAGEMENT DIRECTOR @ 10%		1	7,342				
	DIRECTOR OF Mod & Econ dev @ 100%		1	65,000				
	MODERNIZATION MANAGER @ 100%		1	52,946				
	MODERNIZATION COORDINATOR @ 100%		1	50,279				
	MODERNIZATION CLERK @ 100%		1	37,115				
	FINANCE DIRECTOR @ 10%		1	5,484				
	ACCOUNTING SPECIALIST @ 20%		1	8,854				
	ACCOUNTING SPECIALIST @ 5%		1	2,214				
	PURCHASING CLERK @ 5%		1	1,848				
	MIS SPECIALIST @ 15%		1	5,341				
	HUMAN RESOURCE ADMINISTRATOR @ 2%		1	946				
	2. Employee Benefits (40% of salaries)	1410.9	12	98,744				
	3. Publication of CGP Materials	1410.14		7,000				
	4. Sundry Expenses (Advertising)	1410.19		10,000				
	5. Legal	1410.4		15,000				
	6. Fuel for Mod Vehicles			3,500				
<b>PHA-WIDE</b>	<b>AUDIT</b>	<b>1411</b>		<b>5,000</b>				

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

### Part II: Supporting Pages

PHA Name:		Grant type and Number				Federal FY of Grant	
Tacoma Housing Authority		Capital Fund Program Grant No: <b>WA19P00550101</b>				2001	
		Replacement Housing Factor Grant No:					
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
				Original	Revised	Funds Obligated	Funds Expended
<b>PHA-WIDE</b>	<b>FEES AND COSTS</b>	<b>1430</b>		<b>399,019</b>			
	1. A/E fees for Salishan and Hillside Terrace	1430.1		269,642			
	2. A/E fees for Bergerson Terrace			10,000			
	4. Consulting fees	1430.2		50,000			
	5. Fees & Permits for non-residential	1430.6		1,000			
	6. Inspection Cost	1430.7		58,377			
	7. Sundry Expenses (Reproduction)	1430.19		10,000			
<b>PHA-WIDE</b>	<b>NON-DWELLING EQUIPMENT</b>	<b>1475</b>		<b>20,000</b>			
	15. Common-area furniture for Bergerson Terrace			5,000			
	3. Tools and Equipment for Mod Staff		9	10,000			
	16. Technology upgrades for Mod Staff		1	5,000			
<b>PHA-WIDE</b>	<b>RELOCATION COSTS</b>	<b>1495</b>		<b>20,000</b>			
<b>WA19P005020</b>	<b>BERGERSON TERRACE</b>			<b>84,900</b>			
	<i>Section 8 - \$75,000 - site work</i>	1450		75,000			
	<i>RSDM 2001 Community room acoustics</i>	1470		9,900			
<b>WA19P00518</b>	<b>HILLSIDE TERRACE</b>			<b>2,679,487</b>			
	<b>- DWELLING STRUCT</b>	<b>1460</b>	27 units	<b>2,145,413</b>			
	2. Interior Revitalization			2,145,413			
	a. Replace heaters, stair handrails, closet doors, window coverings						
	b. Insulate walls, lower ceilings, upgrade						
	c. Replace kitchen cabinets, countertops, sinks,						
	d. Repaint interiors, new floor coverings throughout						
	e. Reconfigure units						
	<b>Site work</b>	<b>1450</b>		<b>534,074</b>			
	Sidewalks, parking lots, site utilities, site lighting/security, playground, asbestos abatement, landscaping, fencing		33 units	534,074			
	<b>Dwelling Equipment</b>	<b>1465</b>		<b>52,000</b>			
	Stoves and Refrigerators		52 units	52,000			

# Annual Statement/Performance and Evaluation Report

## Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

### Part II: Supporting Pages

PHA Name: Tacoma Housing Authority		<b>Grant type and Number</b> Capital Fund Program Grant No: <b>WA19P00550101</b> Replacement Housing Factor Grant No:				<b>Federal FY of Grant</b> 2001		
Development Number/PHA-Wide Activities	General Description of Major Work Categories		Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost	
					Original	Revised	Funds Obligated	Funds Expended
<b>PHA-WIDE</b>	<b>CONTINGENCY</b>		<b>1502</b>		<b>0</b>			







Status of Work





SUPPLEMENTAL INFORMATION TO 2001 ANNUAL STATEMENT

TACOMA HOUSING AUTHORITY

SOURCE OF NON-CGP FUNDS

AMOUNT

Section 8 Reimbursement to CGP for Admin. Bldg.

75,000.00 Bergerson Terrace

RSDM Grant 2001

9,900.00 Bergerson Terrace

**Five-Year Action Plan**  
**Part 1: Summary**  
**Capital Fund Program**

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

OMB Approval No. 2577-0157(Exp.7/31/98)

Housing Authority of the City of Tacoma

TACOMA - PIERCE - WASHINGTON

Original  Revision No: \_\_\_\_

A. Development Number/Name	Work Stmt. for Year 1 FFY: 2002	Work Statement for Year 2 FFY: 2003	Work Statement for Year 3 FFY: 2004	Work Statement for Year 4 FFY: 2005	Work Statement for Year 5 FFY: 2005
WA19P005003/SALISHAN WA19P005004/SALISHAN WA19P005005/SALISHAN WA19P005007/SALISHAN WA19P005026/SALISHAN  WA19P005006/911 N K STREET WA19P005014/2306 SIXTH AVE WA19P005009/3201 S FAWCETT WA19P005008/1202 S "M" STREET WA19P005018/HILLSIDE TERRACE WA19P005020/BERGERSON TERRACE WA19P005022/SCATTERED SITES WA19P005024/SCATTERED SITES WA19P005025/SCATTERED SITES	<b>See Annual Statement</b>	\$1,002,601			
B. Physical Improvements Subtotal		\$1,002,601	\$0	\$0	\$0
C. Management Improvements		\$0	\$0	\$0	\$0
D. HA-Wide Nondwelling Structures and Equipment					\$0
E. Administration		\$117,866	\$16,800	\$16,800	\$16,800
F. Other					
a. 1430 Fees and Cost		\$0	\$0	\$0	\$0
b. 1495.1 Relocation Cost		\$0	\$0	\$0	\$0
c. 1502 Contingency		\$0	\$0	\$0	\$0
d. Audit		\$5,000	\$5,000	\$5,000	\$5,000
G. Operations		\$344,707	\$344,707	\$344,707	\$344,707
H. Demolition					
I. Replacement Reserve					
J. Development Activities		\$2,826,914	\$3,930,581	\$3,930,581	\$3,930,581
K. Total CGP Funds		\$4,297,088	\$4,297,088	\$4,297,088	\$4,297,088
L. Total Non-CGP Funds		\$46,798,003	\$46,798,003	\$46,498,003	\$46,498,003
M. Grand Total		\$51,095,091	\$51,095,091	\$50,795,091	\$50,795,091

Signature of Executive Director and Date:

X

Signature of Public Housing Director/Office of Native American Programs Administrator and Date:

X

**Five-Year Action Plan**

**Part II: Supporting Pages**

**Physical Needs Work Statement(s)**

**Capital Fund Program (CFP)**

U. S. Department of Housing

and Urban Development

Office of Public and Indian Housing

OMB Approval No. 2577-0157(Exp.7/31/98)

Work Statement for Year 1	Work Statement for Year 2 2003			Work Statement for Year 3 2004		
	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost
See Annual Statement	WA 5-3; 5-4; 5-5; 5-7; 5-26, Salishan: Mod Funds Used for Development	43 units	\$2,826,914	WA 5-3; 5-4; 5-5; 5-7; 5-26, Salishan: Mod Funds Used for Development	58 units	\$3,930,581
	WA19P005008 1202 South M Street	31 units	\$1,002,601			
	Subtotal of Estimated Cost		\$3,829,515	Subtotal of Estimated Cost		\$3,930,581

**Five-Year Action Plan**

**Part II: Supporting Pages**

**Physical Needs Work Statement(s)**

**Comprehensive Grant Program(CGP)**

U. S. Department of Housing

and Urban Development

Office of Public and Indian Housing

OMB Approval No. 2577-0157(Exp.7/31/98)

Work Statement for Year 1	Work Statement for Year 4 2005			Work Statement for Year 5 2005		
	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost
See Annual Statement	WA 5-3; 5-4; 5-5; 5-7; 5-26, Salishan: Funds Used for Development Mod	58 units	\$3,930,581	WA 5-3; 5-4; 5-5; 5-7; 5-26, Salishan: Funds Used for Development Mod	58 units	\$3,930,581
	Subtotal of Estimated Cost			Subtotal of Estimated Cost		
			\$3,930,581			\$3,930,581



**Five-Year Action Plan**

**Part III: Supporting Pages**

**Management Needs Work Statement(s)**

**Comprehensive Grant Program(CGP)**

U. S. Department of Housing

and Urban Development

Office of Public and Indian Housing

Work Statement for Year 1	Work Statement for Year 2 2003		Work Statement for Year 3 2004				
	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost	
<b><u>Management Improvements</u></b>			<b><u>\$0</u></b>	<b><u>Management Improvements</u></b>		<b><u>\$0</u></b>	
<b><u>Nondwelling Structures &amp; Equipment</u></b>			<b><u>\$0</u></b>	<b><u>Nondwelling Structures &amp; Equipment</u></b>		<b><u>\$0</u></b>	
<b><u>Administration</u></b> 1. TECHNICAL & NON-TECHNICAL WAGES 2. BENEFITS (1410.9)			<b><u>\$117,866</u></b> \$84,190 \$33,676	<b><u>Administration</u></b> 1. TECHNICAL & NON-TECHNICAL WAGES 2. BENEFITS (1410.9)		<b><u>\$16,800</u></b> \$12,000 \$4,800	
<b><u>Other</u></b> F. a. Audit			<b><u>\$5,000</u></b> \$5,000	<b><u>Other</u></b> F. a. Audit		<b><u>\$5,000</u></b> \$5,000	
<b><u>G. Operations</u></b> 6. Contingency (1502) 7. REPRODUCTION			<b><u>\$344,707</u></b> \$0 \$0	<b><u>G. Operations</u></b> 6. Contingency (1502) 7. REPRODUCTION		<b><u>\$344,707</u></b> \$0 \$0	
Subtotal of Estimated Cost			<b>\$467,573</b>	Subtotal of Estimated Cost			<b>\$366,507</b>

**Five-Year Action Plan**

**Part III: Supporting Pages**

**Management Needs Work Statement(s)**

**Comprehensive Grant Program(CGP)**

U. S. Department of Housing

and Urban Development

Office of Public and Indian Housing

Work Statement for Year 1	Work Statement for Year 4 2005			Work Statement for Year 5 2005		
	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/General Description of Major Work Categories	Quantity	Estimated Cost
	<b><u>Management Improvements</u></b>		<b><u>\$0</u></b>	<b><u>Management Improvements</u></b>		<b><u>\$0</u></b>
	<b><u>Nondwelling Structures &amp; Equipment</u></b>			<b><u>Nondwelling Structures &amp; Equipment</u></b>		<b><u>\$0</u></b>
	<b><u>Administration</u></b>		<b><u>\$16,800</u></b>	<b><u>Administration</u></b>		<b><u>\$16,800</u></b>
	1. TECHNICAL & NON-TECHNICAL WAGES		\$12,000	1. TECHNICAL & NON-TECHNICAL WAGES		\$12,000
	2. BENEFITS (1410.9)		\$4,800	2. BENEFITS (1410.9)		\$4,800
	<b><u>Other</u></b>		<b><u>\$5,000</u></b>	<b><u>Other</u></b>		<b><u>\$5,000</u></b>
	F. a. Audit		\$5,000	F. a. Audit		\$5,000
	<b><u>G. Operations</u></b>		<b><u>\$344,707</u></b>	<b><u>G. Operations</u></b>		<b><u>\$344,707</u></b>
	6. Contingency (1502)		\$0	6. Contingency (1502)		\$0
	7. REPRODUCTION		\$0	7. REPRODUCTION		\$0
	Subtotal of Estimated Cost		<b>\$366,507</b>	Subtotal of Estimated Cost		<b>\$366,507</b>

## Comment

December 21, 2001

I enjoyed meeting with you and others on December 5, 2001 to discuss THA's proposed amendments to its 2002 Annual Plan. As you requested, I write to elaborate on my comments and concerns. I submit these comments on behalf of the Bergerson Terrace Resident Council and SAFE, Seniors Advocating for Equality. Also, please accept this letter as comment on the analogous proposals contained in the draft 2002 Annual Plan.

### 1. Sale of 1500 Block of Hillside Terrace

You explained THA's proposal to sell the 16 units at the 1500 block of Hillside Terrace as follows:

- HUD does not presently subsidize these units and has not done so since 1987. Instead, since that time, THA has rented the units to the King Center for use as transitional and emergency housing for homeless families.
- The units require substantial rehabilitation. THA does not presently have the funds for this rehabilitation. The proceeds from the sale will allow THA to better afford the redevelopment of the remainder of Hillside Terrace.
- THA will condition the sale on assurances that the purchaser and successors to the purchaser will forever continue the use of the property as "affordable" housing. This assurance will be placed into the chain of title through a deed restriction.
- This disposition will not preclude THA's future ability to resume HUD's operating subsidies and comprehensive plan funding for the same number of units elsewhere at a later date.

We have the following observations, suggestions, and concerns:

#### 1.1 THA's Replacement Obligation under the No-Net Loss Contract

THA's disposition will count as a loss of units that THA must make up "one for one" under the "no net loss" contract of May 27, 1999. The contract makes clear that these units count in the pre-loss total for the purpose of calculating the number of required replacement units:

The number of replacement units to be developed or constructed shall, subject to the Conditions Precedent, equal or exceed the difference between 182 (the present number of units at Hillside Terrace Apartments, including 16 units leased to the King Center) and the number of actual units at Hillside Terrace reserved for occupancy by low-income families following either the (i) completion of the redevelopment; or (ii) suspension or termination of the redevelopment.

Section 1.3 (emphasis added). The contract does not preclude the proposed sale. However, THA must plan for the additional replacement obligation it will incur as a result. Note as well that, under that contract, the replacement units do not have to be at Hillside Terrace.

#### 1.2 Preservation of Use as "Affordable Housing"

We strongly concur with THA's proposal to ensure that the property will forever be used for affordable housing. Indeed, as THA's draft acknowledges, we do not think that a disposition without this assurance could be consistent as required with Tacoma's Consolidated Plan. We are concerned, however, whether the draft Request for Purchase Offer states this requirement adequately. Page 3 of the draft states the following: Price will not be the sole determining factor in selecting a purchase offer. THA has developed evaluation criteria (Section 3.6) that is designed to select the offer that will result in a successful transaction, mitigate displacement of the existing residents, and assure the use of the property as affordable housing in perpetuity. It is imperative current residents not be displaced. The property presently houses one of the only transitional housing programs in Tacoma, and thus provides a very important service to the City that should not be disrupted.

While this language seems firm, it needs strengthening in several ways.

First, while this language appears to state a firm requirement of the proposal, Section 3.6 only states the continuing use of the property and its continuing affordability as mere weighted factors to be considered, and not as requirements. The Proposal should make clear that the requirements related to affordability are mandates.

Second, Section 3.6 refers to the requirement that the units remain as "affordable housing in perpetuity". As you stated at the meeting, this requirement must be stated as a deed restriction. We completely agree that this is necessary. Additionally, the deed restriction must designate who would have standing to enforce it. We recommend that it designate THA, the City of Tacoma, and any person then on THA's waiting list for housing assistance. Only in this way will we have adequate assurance that subsequent purchasers will honor the restriction. The Request for Purchase Offer should make this clear.

Third, the reference to "affordable housing" is not clear enough without two separate clarifications. Both are essential and both need to be in the Proposal for Purchase Offers and in the deed restrictions:

- (i) The proposal and the deed restrictions must state to whom the units must be affordable. For this purpose, they must refer to a target income group. To be consistent with the needs set forth in Tacoma's Consolidated Plan, the target group should be extremely low-income families (0-30% A.M.I.). This targeting would also be consistent with THA's preferences for public housing units stated in its Annual Plan and with the income levels of the population that presently use the units.

- (ii) The proposal and the deed restrictions must also define what it means for a unit to be "affordable". THA should incorporate the standard definition used by HUD, the state, and the city, i.e. rent and utilities will not exceed 30% of a family's net income.

Fourth, the draft Proposal does not make clear if THA intends to require the continuing use of the property as emergency or transitional housing for homeless families or only that the use be for "affordable housing" with specification as to type of housing. Section 3.6 seems to suggest both but it is not clear.

2 Changes to the Section 8 Preference Criteria

You propose to amend Section 3(B)(4)(6) of the Annual Plan relating to the preference criteria for the Section 8 Program. You explained THA's proposal to "project-base" some of its Section 8 vouchers with privately owned units for seniors or units accompanied by qualified supportive services. You propose to give a preference to households whom the owners of these units would refer to THA.

We can support this proposal with the clarification that you hopefully provided at the meeting and that I confirm as follows: THA will list the new preference as an "Additional Preference." This means that all such persons referred for a "project-based" voucher shall be subject to the primary preferences based upon income. For example, a person referred for a project-based voucher whose income is below 30% of A.M.I. will have the stated preference over a person whose income is between 30-50% of A.M.I., whether the higher income person is seeking a project based voucher or a regular one. An applicant whose income is above 50% of A.M.I., whether seeking a project-based voucher or a regular one, would be at a disadvantage relative to all lower income applicants. In other words, your proposed amendment will not alter the income preferences.

With this clarification, we can support the proposal.

I hope these comments are helpful. Please send me a copy of the final drafts, including the final Request for Purchase Offer.

Thank you.

Michael Mirra, Attorney at Law  
Columbia Legal Services

Response

We are in receipt of your letter dated December 21, 2001. Please note that your letter has been included as an attachment to both the Amended 2001 Annual Plan and the 2002 Annual Plan.

The following is our response to the issues raised in your letter:

1. Sale of 1500 Block of Hillside Terrace:
  - 1.1.1 THA acknowledges that the sale of the units at the 1500 block shall constitute a loss under the Net Loss Agreement. THA will continue to exercise good faith in its efforts to develop, procure and construct dwelling units within the City of Tacoma to mitigate the loss of units.
  - 1.1.2 The Request for Purchase Offers to be published in conjunction with the sale of the units at the 1500 block of South G (Hillside Terrace) has been revised to strengthen the requirement that any purchase offer commit to maintaining the units as affordable in perpetuity. THA will work with its legal counsel to determine the best vehicle to covenant the affordability requirement. Affordability will be clarified to reference household income as well as payment burden. While THA would prefer that the units continue to be used as transitional housing, such proposed use will not be a requirement of a purchase offer.
2. Changes to Section 8 Preference Criteria:

The proposed Section 8 Preference will continue to be subject to the primary income preference. Moreover, THA does not maintain two Section 8 waiting lists based upon income criteria. THA pulls from the central waiting list, determines income qualification, and then ranks the application according to the additional preferences.

Thank you for your participation in the Annual Plan process. Please let me know if we can assist in facilitating any further meetings with the Resident Advisory Board.

Peter J. Ansara, Executive Director

Comment

March 13, 2002

I am sending in a complaint that I was not and the majority of the Tacoma Housing Authority residents were not invited to participate in the various meetings, concerning the 5 year plan. I am very confused and cannot understand on how the drafting was accomplished without the input of the various THA residents including the THA Section 8 residents. I was invited as a RAB member to one meeting and at that meeting the THA workers who attend this skip over a lot the plan sometimes 10 to 12 pages at a time and going back to those pages I found a lot of concern regarding some of the 5 year plan. In other words I demand any as well as all of THA resident participation and if I feel that THA does not address this problem then I will have a problem with THA.

Ms. Willie P. Anderson  
2516 Ct G Apt 61  
Tacoma, WA 98405 Hillside Terrace resident

### Response

April 5, 2002  
Ms. Willie Anderson  
2516 Court G #61  
Tacoma, WA 98404

Dear Ms. Anderson:

Thank you for your March 13, 2002, letter regarding Tacoma Housing Authority's Five Year and Annual Plan.

Tacoma Housing Authority (THA) held two joint planning meetings with the Resident Advisory Board and other planning team members in preparation of this year's annual plan submission. These meetings occurred on December 20, 2001, and January 9, 2002. Resident Advisory Board invitees included six (6) public housing residents and three (3) Section 8 participants, for a total of nine (9) Resident Advisory Board members. Our records show that you attended the January 9, 2002, meeting as a Resident Advisory Board member from the Hillside Terrace public housing development.

The two meetings resulted in agreement of the plan. The plan was posted on our web site, copies were made available to the public and meetings with residents were held prior to the public hearing to promote attendance to the March 13 meeting. We are sorry you feel that residents were not invited to participate at the RAB meetings. RAB members represent residents and as such gather and communicate their concerns to the entire RAB planning team.

Invitations to the March 13, 2002, annual plan public hearing were mailed to all public housing households and all Section 8 households. Over 100 public housing residents and Section 8 participants attended the March 13 public hearing.

THA believes we made significant efforts to inform residents about the annual plan planning process. We encouraged the Resident Advisory Board to schedule additional meeting regarding the annual plan, if that was their desire; however, the RAB did not request that additional meetings be scheduled.

Sincerely,  
Peter J. Ansara  
Executive Director

### **Annual Plan Meeting Minutes**

December 20, 2001, 3:30 PM ñ 6:00 PM, Family Investment Center Addition

#### Attendance:

THA STAFF: Ann Lemieux, Loretta Diallo, Deana Rader, Suzanne Fiske, Peter Ansara, Jean Turner, Kathy Trathen, Julie Foss, Teresa Linton, Tess Colby, Nancy Vignec  
RAB Members: Ida May Stuart, Micheal Hegwood  
Planning Team: Michael Mirra (Columbia Legal Services); Paula Peltier (DSHS); Cheryl Swalling (City of Tacoma Human Rights Department)

#### **1. Welcome and Introductions**

**Peter Ansara**

In the 1998 Quality Housing Work Responsibility Act, housing authorities were provided flexibility and discretion in funding low income families in public housing. One facet of this act ensures public participation in the planning process. Our Annual Plan, including attachments, are available to the public and to residents. The Plan is used to assess housing long and short term needs, identify finances and other resources to help with resident needs, and to assist in developing goals and strategies which will later be translated into policies and procedures. Tacoma Housing Authority (THA) appoints a Resident Advisory Board (RAB) to assist in this process. The same members who participated last year received written invitations to join us again this year, however, only Mr. Hegwood is present from that group. *THA will continue to reach out to the resident populace* to ensure greater resident participation, as residents are an important element of the process. THA is required to establish one or more RABs, with members being individuals assisted by THA. The role of the RAB is to make recommendations in the development of the plan. THA is to facilitate and encourage participation from the beginning of the process, and to request input from the RAB. *THA will send copies of materials distributed today to absent invitees.* There

is no fixed term of service on the RAB. If a housing authority cannot establish a public housing resident RAB, it can do outreach to any and all program participants. Section 8 assisted individuals do not have resident councils; THA also performed outreach for Section 8 recipients to be adequately represented, and two individuals confirmed their intention to attend this meeting.

It is also THA's responsibility to give the RAB sufficient time to review and comment on the Plan. We will discuss and get buy-in on the proposed timeline. Previous advance notice, a minimum of 48 hours, must be given for meetings. It is THA's experience that higher attendance results with shorter notice, but not less than 72 hours. All RAB members are provided with existing documents which will become part of the plan, and THA will provide RAB members with reasonable support to carry out their tasks (i.e. meeting place, telephone support, computer support). The RAB is involved early in this process.

## **2. Overall timeline for plan review, public hearing, etc.**

**Peter Ansara**

*Changes which result from today's meeting will be incorporated into materials for the next meeting.* Members of the RAB are encouraged to provide input and request support as needed. The contact person is Executive Assistant Ann Lemieux at 253-207-4421. The proposed timeline is as follows:

- Planning team meeting December 20, 2001 (today)
- Planning team meeting January 9, 2002
- Public notice published January 25, 2002
- Public hearing March 13, 2002
- THA board meeting March 27, 2002
- Submission of plan

Executive Director Ansara asked if there were any issues with the proposed timeline. Director Vignec noted that Donna Miller of Seniors Advocating for Equality (SAFE), a resident organization, requested that residents meet prior to the 1/9/2002 meeting and is desirous of having Mr. Michael Mirra, attorney with Columbia Legal Services facilitate that meeting. *Micheal Hegwood also requested a meeting be held at Salishan where Salishan residents would be able to attend.* Executive Director Ansara noted that Mr. Hegwood and Martina O'Neil were the representatives SACS recommended to serve on the RAB. Mr. Mirra stated he was available to be helpful in any way residents wished.

## **3. Areas of 2002 plan for discussion**

Following are proposed changes to the Housing Authority of the City of Tacoma's Annual Plan for Fiscal Year 2002 (HUD 50075), an undated, draft copy of which was distributed and *which will be placed on THA's website*. Please notify THA of any additional requested changes to consider for inclusion on the next meeting agenda.

### **a. Statement of Financial Resources, page 13**

#### **No PHDEP funding, increase in ROSS RSDM**

**Nancy Vignec**

**item 1f.** There is one final grant available.

**item 1g.** There are actually 4 grants; 1999 RSDM for Salishan, 2000 RSDM for seniors, 2001 RSDM for Bergerson which is \$500,000 of new monies for employment readiness, van transportation and driver, social activities, classes (English as a Second Language, financial management, etc.), resident activities, and also includes \$100,000 in construction funding to improve both the Hillside and Bergerson community rooms. The fourth grant is a small one for senior services.

**item 1h.** Tess Colby explained the CDBG funds of \$350,000, together with Washington State Bond Cap and private equity are anticipated for use in revitalizing the 2300 block of South G Street at Hillside Terrace.

items 1h & 1i. The CDBG funds are awarded biannually by the City of Tacoma. THA has not received nor intends on applying for HOME funds for public housing capital improvements.

item 3. This income reflects rent rolls of residents and does not include HUD subsidy.

**item 5.** Tess Colby defined the \$50,000 Department of Ecology funds as the FY2002 remainder of a \$75,000 grant to prepare a low-impact development feasibility study for the Salishan revitalization.

### **b. Section 8 Waiting List Organization, page 20**

Where to apply for admission to Section 8      Teresa Linton

**page 21, item 2b.** This adds the four site offices (Hillside Terrace, Bergerson Terrace, and two at Salishan) at which applications will be made available.

**c. Section 8 Admissions Preferences, page 21**

**Teresa Linton**

**page 22, end of item 2.** Adding Project-Base as a preference. In the 2001 Annual Plan, THA indicated that it would set aside up to 20% of its Section 8 tenant based vouchers to be project based at qualified projects, either new or rehab. The Project-Base change creates a preference for applicants referred to the THA Section 8 waiting list from housing developments that have received an allocation of project based Section 8 vouchers from THA. The preference allows THA to move these applicants, once they qualify for admission into the program, to the top of the list so that they can receive the project based subsidy. The Project Base preference would be permitted only after income qualification was determined.

**page 23, item 6, sub item 4.** was added to reflect the addition of Project-Base as a preference.

**d. Section 8 Income Targeting, page 23**

**Teresa Linton**

**page 23, item 6.** Note following sub item 2 should read *For example, out of every 20 new vouchers granted, THA will assign 17 (85%) to households with incomes at or below 30% of A.M.I and 3 (15%) to households with incomes between 31% and 50% of A.M.I.* Last year, it was anticipated two wait lists would be maintained for income targeting, however, THA could not accommodate two lists on its computerized system, and the two-list criteria has been deleted.

To accomplish income targeting, ensuring the 85/15 split defined above, THA performed a review of applicants on the wait list between 7/1/2000 and 6/30/2001. Of 659 applicants, 640 were at or below 30% A.M.I., 18 between 31% and 50% of A.M.I., and 1 below 80% A.M.I. Currently, to check income, applications within a specific date are prioritized with those families at or below 30% A.M.I. being granted vouchers first. THA will dictate a policy to quarterly poll and review for compliance with income targeting. It should be noted that income limits are lower for Section 8 than for public housing; *an attachment of income limits will be included in the next Annual Plan Meeting attachments.*

**e. HUD Programs under PHA Management, p. 29**  
**Home program, 2001 ROSS RSDM**

**Nancy Vignec**

**item B.** HOME certificates are reduced from 72 last year to 25 this year. Other Federal Programs now includes the addition of a 2001 ROSS RSDM Family grant serving 120 families.

The 400 additional vouchers in the total 3266 Section 8 Vouchers are for relocation under the revitalization of Salishan. HUD provided notice of the appropriation and THA has responded with a request for HUD to hold the vouchers until needed and is awaiting a response. Allocations are subject to annual appropriations, with the dollar amount based on the prior year's experience. Depending on usage, the budget authority may cover more or fewer actual vouchers. Section Eight Management Assessment Program (SEMAP), HUD's rating system, has as a goal 95% usage in number of vouchers or dollars. This year's costs increased approximately 8% over last year (larger families, larger units, higher cost per voucher). THA will ensure the availability of relocation vouchers through its relocation plan. Up to 20% of those vouchers may be allocated for Project-Base, which may assist in having relocation points for families.

In response to a query regarding the lack of specific funding for disabled and mentally ill residents, who are most often categorized with seniors and for whom senior activities are not necessarily appropriate.

**f. Maintenance Policy, page 30**

**Peter Ansara**

**item C.** Last year, a complex plan was proposed. In addition to a plan, policies and procedures are needed. THA is now in the process of hiring a Director of Property Management and that individual will have a large degree of responsibility in this area. For the planning process, volunteers *Donna Miller, Micheal Hegwood and May Stuart of the RAB will work with Property manager Kathy Trathen in a sub-committee meeting to provide input to the maintenance policy.* A draft policy was provided.

*item 7,B,d). Add Hillside Terrace*

**g. Demolition/Disposition, page 32**

**Tess Colby**

**page 33.** references the Hillside and Salishan grants in place.

**page 34, item 2.** This refers to the Hillside Terrace 1500 block. THA's goal is to sell 16 units on the 1500 block of South G Street. Currently the units are under lease to Martin Luther King Housing Development Association, which uses the units in their Transitional Housing program. They were leased to the King Center since the mid 1980's, since which time maintenance has been deferred and the units are now in

poor condition. THA has determined that, based on the unit rehab need, the lost revenue over the life of the lease, and the limited resources available to THA, it is in THA's best financial interest to sell the units. However, THA recognizes the benefit to the community of retaining these units as affordable housing. As such, THA intends to put conditions on the sale of the units to ensure that the units will be used as affordable housing in perpetuity. Purchasers must commit, through deed restrictions, to use the property as affordable housing. Interested purchasers will be asked to provide evidence of financing to purchase, run and rehabilitate units to Housing Quality Standards. *A Request for Proposals for a competitive sale process has been drafted and will be circulated to the Planning Team.*

The process of disposing of units is complex and lengthy, involving public notification and application to HUD for permission. There is a resident consultation process, which THA has been engaging in through two public meetings: the first meeting was on November 16, and the second on December 5. The final Public Hearing will be January 14, at 6:00 pm, at the Family Investment Center. In addition to resident consultation, the Disposition regulates the sale of the units, and an offer to sell to the Residents. If there is a resident council (RC) or resident management corporation (RMC) currently in effect at the affected development, then an offer to sell the units to the resident organization is made. However, this requirement is waived if one of the two circumstances exist: a) there is no RC or RMC to which the THA can offer the units for sale; or b) the sale of the units results in commensurate public benefit. In the case of the units at the 1500 block, Hillside Terrace does not currently have a RC or RMC; one is organizing and anticipated for January. In addition, by requiring that the units be used as affordable housing, THA is ensuring a public benefit from the sale of the units. Although this disposition is being discussed with residents and the Planning Team, THA will not be offering the 1500 block to the future Hillside Terrace Resident Council for purchase.

At the first resident consultation meeting, two residents from Hillside Terrace were present, Mae Stuart and Willie Anderson, as well as Jim Colburn from the City of Tacoma. At the second meeting, no residents were present. Mr. Mirra and Cheryl Swalling from the City of Tacoma's Human Rights Department were present. Prior to the January 14, 2002, public hearing, notices will be provided to all Hillside residents, the RAB and Planning Team.

In response to a request for an opportunity for Hillside residents to tour the property, Tess Colby indicated THA will offer an opportunity for parties interested in purchasing the 1500 block to view the property. This will not be an open house, and is so limited in deference to the residents living in the units. The subject units are located at 1507 South G Street and Court F.

Elections for the Hillside Terrace Resident Council are scheduled for January 10. THA will encourage residents to attend a meeting at which translation will be provided.

In response to comment regarding hearsay of translation problems, it was clarified that many non-English-speaking residents are also unable to read their own language. THA staff are working with Safe Streets through the telephone tree to effect a more workable translation solution. All resident input and assistance is welcome in this endeavor.

**page 35** *item 5 in the top section will be corrected to read "Number of units affected: 20" and item 5 in the bottom section will be corrected to read "Number of units affected: 25".*

Both sections address the 2300 block of Hillside Terrace, which has been vacant for a few years while THA has attempted to come up with financing strategies to improve the unit design and bring the units back on line. Only partial demolition funding was previously available. There are 39 vacant units. THA has worked with residents and financial advisors to develop a strategy to revitalize the units. Residents have worked for over 1 year with the design team, and THA has now identified funding sources to return the units on line as follows: 33 public housing and 12 affordable housing units that will receive an allocation of Section 8 Project-Based vouchers, for a total of 45 units accessible to extremely low income families. *A proposed plan will be included in the next meeting handouts and information will be made available on THA's website.* Construction is planned in two phases. Phase 1 will yield 20 public housing units using mixed financing - bonds, tax credits, CDBG funds, State Housing Trust Fund and THA funds. In the 2<sup>nd</sup> phase, 15 existing units will be demolished and replaced with 25 new units funded with tax credits and THA funds, providing 13 public housing units and 12 affordable housing (Section 8 Project-Based) units.

It is important to understand that because THA will be using private money, it will be creating an ownership entity that is a Limited Partnership, which includes both THA as the managing general partner, and a private sector limited partner. THA will be the managing general partner, and will continue to operate the units as part of our whole portfolio. What follows is a brief explanation of how the tax credits work, and why THA will need to dispose of the units to the Partnership.

In building both Phase 1 and Phase 2, THA will be seeking an allocation of Low Income Housing Tax Credits. THA can then sell the tax credits to a syndicator, a large financial organization that pools the investments



of corporations like Disney, Prudential, Chevron, Wells Fargo, that benefit from the tax shelter created by the tax credits. THA will ask for bids from these various syndicators, and set up a competition based not just on price but also on business terms. The bidders will specify their business terms and their relationship in the partnership, what they will demand and what they will accept for the duration of the partnership. THA will then rate the offers before accepting the best bid.

Because the use of tax credits creates a form of ownership that is not solely held by THA, HUD requires that THA dispose of the units to the partnership. This is required when THA creates a lease for the land and units, as well. At the 2300 block, the Partnership will own a leasehold interest in the units and land, while THA will continue to be the fee simple owner of the land.

What is the duration of the Affordable Housing conditions? For tax credit program, IRS requires that the units remain affordable for a minimum of 15 years. The State of Washington requires 15 additional years for a total of 30 years. THA will lease the improvements and the land to the partnership, and affordability covenants can be written into the lease. Such leases are typically 55 years. The lease is recorded on title, and the covenants remain in place as long as the lease is in place.

The affordability must be defined; do you foresee any difficulty in getting it down to the 30% A.M.I. group? Difficulties are not anticipated with the resources available. If the units are run as permanent housing, then Project Based Section 8 is a resource that can be used to make the units affordable to 30% AMI or below. If it continues as a transitional housing program, then there are other funding sources, such as Sound Family funding, that can be used in conjunction with the Project Based Section 8.

Does the tax credit apply to public housing? The equity of tax credits goes to all units. What distinguishes public housing is the Annual Contributions Contract (ACC) with HUD.

Will the partnership be owning conventional housing units? Who gets Comprehensive Grant funds? THA, as the General Partner.

Do the units revert to THA? After 15 years (end of the limited partnership), the limited partner can sell their ownership interests. In the Partnership Agreement, THA will require that the first option to purchase the limited partner's interests be offered to THA.

Can the partner pull a sneaky and sell it out from under us? No way, unless THA defaults by committing a huge mistake and defaults on the Partnership Agreement. And even then, THA will have the right to cure any defaults under the Agreement. The only time limited partners remove a general partner is for extreme cases of mismanagement (such as not renting units to income qualified households) or incompetence. We don't expect either to occur with THA.

#### **h. Services and Programs, page 41**

**Nancy Vignec**

##### **Add RSDM, Changes with FSS participant numbers**

**Item B,1,b.** Adds the 2001 ROSS RSDM grant serving 120 families.

*Item B,1,b* Change the 1999 ROSS RSDM estimated size from 235 to 236.

**Item B,2.** This information is not complete yet. The FSS number changes with the number of housing units and vouchers available, and also in accordance with HUD rules which allows a decrease depending on number of graduates. In 1999 and 2000, there were 57 Section 8 graduates from the program.

#### **i. Community Service Requirement, page 42**

**Nancy Vignec**

**Item D.** Last year, Community Service was discussed for residents at Hillside Terrace, Bergerson Terrace, Dixon Village and Salishan, with certain individuals exempt (working families, DSHS-exempt, disabled, elderly, families with a very young child, etc.). This was not implemented. There have been changes to requirements for Community Service, except that it is now limited to HOPE VI Sites. THA has been planning, with input from DSHS on who should be exempt, for implementation at Salishan. The number will be very small as many folks are already serving in their community. As soon as the requirements are clear, THA will share the information with residents. This is a difficult requirement to manage as it is an unfunded mandate. It was noted that at Salishan, DSHS sanctions are beginning to impact residents, particularly those who have reached the end of the 5-year assistance and for child support.

#### **j. PHDEP/PHDEP Plan page 44**

**Nancy Vignec**

**Item 13, D.** THA hasn't filled in Yes or No because there is no PHDEP plan as no new PHDEP grants will be awarded. THA has funding in place through October 2003 from previous grants, and is in the process of

identifying essential parts of the program. THA will identify other sources of funding or other providers of essential services. Of particular concern are security, security patrols, youth and family programs, the Eastside Neighborhood Center, staff and other programs. HUD is now funding Weed & Seed through cities; THA will pursue Weed & Seed funding. Additionally, the Boys and Girls Clubs are moving toward operating programs in public housing developments.

May Stuart noted HAC applied for a \$10,000 grant which she would like to see be used for security. As a block leader, she wants to start Walkabouts, but does not want to take a group out without a cellular telephone.

Executive Director Ansara will seek support from the new leadership of the Tacoma Police Department (TPD). HUD measures law enforcement services above and beyond baseline services. It is up to THA and residents to demand patrols and creative community policing. In seeking to enhance services, THA will do outreach to set up meetings at each development. THA has offered TPD community police station space at developments and advised of the availability of programs whereby police officers live in public housing and provide positive interaction with residents.

The senior resident council was recently awarded a technical assistance grant to develop crime prevention strategies. Seniors have selected the consultant, and their plans will include resident and police involvement.

**k. Capital Fund Grant attachment following page 49**

**Tess Colby**

**Attachment B.** This is THA's FY2002 plans for the Capital Fund Program. It is set up similarly to prior years. **Page 3 of 5** shows \$400,000 for Hillside Terrace modernization, and \$2,197,399 for the modernization of 1202 South M Street senior complex. \$69,000 is earmarked for relocation of M Street residents if needed; the nature of the renovations indicates only a partial relocation of residents may be required as the work is performed.

**l. Resident Advisory Board Recommendations, page 46**

**Peter Ansara**

To maintain the focus of the RAB, out of respect for the RAB, and in an effort to move forward we are seeking consensus to not repeat the same extensive discussion again at the next meeting. Details of the final changes will be reviewed at the public hearing. If there are any issues to be addressed, Team members are requested to bring them to THA for inclusion as agenda items. THA is desirous of allowing the RAB and residents sufficient time to review the Plan and make recommendations. Our goal is to be as open as possible and as is necessary to gather input. Executive Assistant Ann Lemieux is the point of contact at 253-207-4421 or e-mail. Executive Director Ansara ensures that RAB requirements such as space and materials will be facilitated. *THA will make minutes available by mailing to the Planning Team. Future Annual Plan covers will include DRAFT and the date changes are complete to.*

If the agenda for the next (January 9, 2002) meeting is brief, the second planning meeting will also include discussion for the public hearing.

Next planning team meeting: Wednesday, January 9, 2002  
**3:30 PM to 6:00 PM, at 902 South L Street, 2<sup>nd</sup> floor conference room**

\*\*\*\*\*

**Annual Plan Meeting Minutes**

January 9, 2002, 3:30 PM to 5:00 PM, THA Administrative Offices, 902 South L Street

THA STAFF: Ann Lemieux, Deana Rader, Sharon Anderson, Jean Turner, Kathy Trathen, Nancy Vignec, Jesse Sherman, Teresa Linton, Tess Colby  
RAB Members: Ida May Stuart, Roslynn Watson, Ms. Willie P. Anderson, Donna Miller  
Planning Team: James Colburn (City of Tacoma); Paula Peltier (DSHS)

**1. Welcome and Introductions**

**Tess Colby**

Mr. Ansara, who is attending a HOPE VI Grantee conference in Washington, DC, designated Tess Colby and Nancy Vignec to co-chair tonight's meeting. Ms. Colby welcomed attendees; roundtable introductions were held.

Q: A request was made for time for concerns to be addressed.  
A: Review of the prior meeting will take place following the meeting.

## **2. Overall timeline for plan review, public hearing, etc.**

**Tess Colby**

- a. Planning team meeting December 20, 2001
- b. Planning team meeting January 9, 2002
- c. Public notice published January 25, 2002
- d. Public hearing March 13, 2002
- e. THA board meeting March 27, 2002
- f. Submission of plan Mid-April

The public notice will be published in the Tacoma News Tribune on January 25, 2002. This initiates the 45 day public comment period ending March 13, 2002. The Plan is due for submission to HUD in April. *Complete copies of the Annual plan, including attachments and minutes of planning team meetings, will be made available to the public and residents in the following locations:*

*Tacoma Public Library (main branch)*

*THA Administration building*

*Hillside Terrace management office*

*Bergerson Terrace management office*

*Salishan management offices*

*Family Investment Center*

*Seniors Advocating for Equality (SAFE) \**

*\*As the SAFE office is not accessible, Donna Miller will be the point of contact for seniors. Ms. Miller will hold a complete set of documents; public notice and planning team minutes will be posted at each senior citizen public housing development.*

*A complete set of planning team minutes will be posted on the THA Web Site as well.*

## **3. Areas of 2002 plan (DRAFT: January 2, 2002) for discussion**

### **a. Executive Summary, pages 1 and 2**

**Tess Colby**

Page 1, third paragraph, reference to 20% of Section 8 vouchers being set-aside for Project-Based Section 8 deleted, as this was implemented in the 2001 Annual Plan

Page 2, disposition added in reference to THA's Capital Improvements

Page 3, the Volunteer Community Service Program will only be offered at HOPE VI site

Q: Is disposition different from last year?

A: In the 2001 Annual Plan, THA did not contemplate disposition. Because of proposed disposition activities, the 2001 Plan is being amended to reference disposition, and the 2002 will include disposition activities, as well.

*Page 3: Required Attachments*

*Delete the "X" in the last box, "Other" under Optional Attachments*

### **b. Housing Needs of Families on Waiting List, Section 8, page 8**

**Teresa Linton**

The percentages were corrected 85% corrected to 86%: 1% corrected to 2%.

Q: Is this information from the wait list?

A: Yes, through December 31, 2002. Staff is still inputting applications.

Q: The total number on the wait list appears lower than last year.

A: Since the Section 8 waiting list opened up, we have been cleaning up the waiting list. In addition, families are coming off the waiting list and taking vouchers, so there are fewer names on the list than last year.

### **c. Strategy for Addressing Needs, page 9**

**Tess Colby**

Section C, first paragraph, add "and disposition".

Pages 21 and 22:

Q: Please note strike-throughs on pages 21 and 22; can the words be deleted?

A: No. The Plan is a template, and can not be easily edited. We must stay within the format.

### **d. Section 8 Income Targeting, page 23**

**Teresa Linton**

Item 6, sub item 4, add "Project-based units".

Mid-page, paragraph starting with "For example," change "at or below 50%" to read "between 31 % and 50%".

Q: What is Project-based?

A: Project-based is a method to tie vouchers to units rather than individuals. It is used to retain more affordable housing in an area. Many owners are opting out of Section 8, reducing the availability of units to individuals holding vouchers.

Q: *Page 22, check box for Victims of reprisals or hate crimes. Review #3 for rating preferences are stated on page 23, #6, 1-2 and 1-6. There was discussion regarding the method in which items were to be correctly indicated or annotated in this plan.*

A: *THA will clarify HUD reporting requirements to ensure accuracy.*

Ms. Linton distributed PHA Circular No. 01-06 which contains HUD-defined income limits and income limit area definitions for the states of Alaska, Idaho, Oregon and Washington.

**e. Maintenance Policy, page 30**

**Kathy Trathen**

Section 5, C. At the last meeting, a committee was formed from the RAB to address the Maintenance Plan. The committee, consisting of Ida May Stuart, Donna Miller and THA's four property managers met last Friday. The plan was reviewed and approved with some wordsmithing but no substantive changes.

Change the name "Maintenance Plan" to "Maintenance Policy" to agree with the title provided in the Annual Plan.

Q: Why is maintenance charging for repairs when we are living in apartments falling apart? Charges only started this last year.

A: THA has always charged the tenant for items other than normal wear and tear; this is not a new policy.

**f. HOPE VI & Public Housing Development & Replacement, page 32**

**Tess Colby**

*In B, 3, d, due to mixed financing, Hillside Terrace Development was added.*

In B, 3, e, delete "Hillside Terrace and Salishan Housing Development".

**g. Demolition/Disposition, page 35**

**Tess Colby**

Item 5 in each of the two blocks were corrected to 20 (upper) and 25 (lower).

Q: Why shown twice?

A: THA will be creating a partnership in this mixed finance development, and THA will have to sell the property to the partnership. Every time a housing authority either sells or leases property or units a disposition application must be submitted to HUD and the Annual Plan must reflect the disposition.

Referring to a draft plan of the 2300 Block of Hillside Terrace which was distributed at this meeting, Ms. Colby explained:

- The plan shows 50 units; there will be 45.
- A new community room is proposed.
- Rehabilitated units will be reconfigured to be made more livable.
- Phase One, affecting the alley side of the block, will be remodeled in a "gut rehabilitation" eliminating multiple levels per unit.
- Phase Two, on the G Street side of the block, includes demolition and rebuilding of units. This will comply with the existing demolition grant and provide additional housing to the site.
- On the whole block, there will be 33 public housing units and 12 other affordable housing units which are intended to be project-based Section 8 serving families at or below 30% of A.M.I.

Q: Are you asking HUD for permission or funding for this?

A: Permission only, no new funding. THA will be using Capital Grant funds to leverage other funding for this improvement.

Q: Are these units for ownerships?

A: No, rental.

Q: Are the mixed income issues gone?

A: Mixed income was mentioned initially at the beginning of the demolition grant years ago, yes. Mixed income has not been part of discussions since that time.

Q: What is the old Boys and Girls Club building being used for? ñ a homeless shelter? halfway house?

A: B & G sold the building to a private owner who is using it as an artist's warehouse, carrying stained glass supplies and possibly including a ballet studio.

Q: Is this draft Hillside plan final?

A: No, it incorporates input from the design team, but is not finished.

Q: What is the square footage of the planned units?

A: The size varies; the smallest one-bedroom unit is approximately 650 square feet and the largest three-bedroom 1100-1200 square feet. 20% of the units will be three-bedrooms. This is a preliminary schematic only.

**h. Services and Programs, page 41**

**Nancy Vignec**

**Changes with FSS participant numbers.** In the Family Self Sufficiency program, the required number of participants is determined by the number of Section 8 vouchers and- public housing incentive awards received by a housing authority at certain times. Beginning in 1999, as people graduated the program, housing authorities were allowed to decrease the -required number of participants by subtracting from the number of graduates from the required number of participants. THA can subtract 21 public housing graduates and 46 Section 8 graduates.

Section 12. B. 2. a. Program Description, change 'Required Number of Participants', Public Housing, from 15 to 0 (zero), and Section 8 from 24 to 35.

**i. Resident Advisory Board Recommendations page 46**

**Nancy Vignec**

*18. A.1. Columbia Legal Services has provided input, on behalf of the RAB, in Michael Mirra's- December letter. This box will be marked with an X*

*18. A.2. The letter will be an Attachment to the Plan*

*18.A.3. THA has considered the comments, but no changes will be made to the Plan as a result. THA's response to the letter will be part of the Attachment.*

The RAB committee is welcome to meet on its own; THA will provide meeting space in its facilities. Michael Mirra of Columbia Legal Services has offered to facilitate the meeting(s). Our goal is to be as open as possible and as is necessary to gather input. Executive Assistant Ann Lemieux is the point of contact at 253-207-4421 or e-mail at [alemieux@tacomahousing.org](mailto:alemieux@tacomahousing.org). THA is requesting any additional comments from the RAB in writing by March 6 so the comments can be incorporated prior to the public hearing on March 13.

Q: Page 44, B, 1. Referencing Weed and Seed, is this program being withdrawn from the East side?

A: The focus is changing in July 2002 and will no longer focus on the East side. However, HUD has designated - additional Weed and Seed funding for public housing neighborhoods, and THA will partner with the City of Tacoma to include the East side - in future ñ Weed and Seed grant applications.

**j. Resident Survey**

**Kathy Trathen**

HUD contracts a service, REAC, to annually perform resident surveys. A portion of public housing residents are provided written surveys to complete and return directly to REAC. THA's response rate of 29% may be partially attributable to language and literacy barriers. A spreadsheet showing national average scores and THA scores by category was distributed at this meeting. In areas where THA scored below 80%, HUD requires a follow up plan to be submitted. THA is working on such plans for the areas of communication, safety, and neighborhood appearance. One component of the plan includes quarterly meetings between property management staff and residents. *THA will provide a copy of the survey.*

Ms. Vignec stated THA also conducts another safety -based survey which is verbal and multi-lingual, garnering a 69% response rate. It has been conducted for 5-6 years, showing that while there has been an increase in feelings of safety, there is still room for growth in this area.

It was recommended that THA use a popular topic such as safety to draw residents to the proposed quarterly meetings, and to include other important issues as well. Suggestions are welcome for increased survey and meeting response and resident buy-in. These recommendations will be added to the follow-up plan.

**k. Public Hearing, March 13, 2002**

**Tess Colby**

Comments from the RAB must be received no later than Wednesday, March 6, 2002 for inclusion in the public hearing.

Final comments to the Annual Plan must be received at THA no later than 11 AM on Tuesday, March 19, 2002.

At last year's public hearing, there was excellent turnout. Invitations were mailed to all THA clients. Attendees were divided by language, with RAB and advisory team members joining groups to answer group questions. Negative feedback remarked on the lack of microphones, inability to hear speakers, confusion where language groups bordered, and overheard comments about not attending again.

Recommendations for improvement include:

- Mail invitations again.
- Also post at MLK, New Look Apartments, MDC and other housing-related agencies.
- Include start and end times.
- Advertise as "new and improved" and more fully describe what will transpire in the meeting.
- Use area or room dividers to provide sound barriers between language groups.
- Alternate agenda could include greeting, splitting by languages and regroup and report back.
- Consider holding additional meetings prior to the public hearing with different language groups each night - to address "general" issues of concern to residents. This will make it easier to focus the public hearing specifically on changes to the annual plan.
- Arrange for transportation using THA's two vans and asking City Human -Rights and Human Services Department for use of senior vans.
- Setting a regular "Annual Meeting" day which residents can plan on instead of varying the date from year to year.



## HOUSING AUTHORITY OF THE CITY OF TACOMA PET POLICY AND AGREEMENT

1. This agreement authorizes \_\_\_\_\_, residing at \_\_\_\_\_, to maintain not more than one (1) pet described below, provided all conditions of this agreement are kept and the pet is maintained responsibly and in accordance with applicable state and local public health animal control and animal anti-cruelty laws and regulations.

Pet Type \_\_\_\_\_ Sex \_\_\_\_\_  
Neutered (date) \_\_\_\_\_ Breed \_\_\_\_\_  
Weight \_\_\_\_\_ Color \_\_\_\_\_ Age \_\_\_\_\_  
Name \_\_\_\_\_  
**(Color photo of pet must be attached)**

Tenant agrees to keep no pet other than the one authorized by this agreement. When full grown the pet may not exceed 20 pounds at senior and other apartment style complexes and 40 pounds at Salishan, Dixon Village and Scattered Sites. Large dogs such as Pit Bulls, German Shepherds, Dobermans, Rottweilers, Great Danes, Chows, Dalmatians, or any other large breed of dog which will traditionally exceed 40 pounds when full grown are not allowed.

2. Execution of this agreement acknowledges receipt of a non-refundable fee of \$150.00 to cover reasonable operating costs to the development relating to the presence of a pet.

A Non-Refundable Fee will be charged for:

Dog	\$150.00
Cat	\$150.00
Caged Bird(s)	\$150.00 (birds of prey are not accepted) (Cages may not be attached to ceilings or walls)
Caged Guinea Pigs	\$ 75.00
Caged Hamster	\$ 75.00
Dangerous or poisonous fish or lizards or exotic pets are not permitted)	

3. Dog or cat shall remain inside a tenant's unit unless attended on a leash not longer than six (6) feet. The pet shall be appropriately and effectively restrained and under the control of a responsible individual while on the common areas of the development.

Tenant must pick up and dispose of all animal waste in sealed plastic bags and place the bag in the garbage containers.

In the case of cats and other pets using litter boxes, the pet owner must change the litter no less than once a week. Litter must be disposed of in plastic bags and must be placed in the

garbage container.

4. The Housing Authority may enter a unit to transfer any animal to the proper authority that is left unattended for 24 hours. The Housing Authority accepts no responsibility for pets so removed.
5. The Housing Authority has the right to conduct an inspection of the tenant's unit for compliance with this Agreement once every three months for the first year.
6. At the time of annual re-examination, tenants shall provide written proof of:
  - a. current license from city or county;
  - b. a certificate signed by a licensed veterinarian or state or local authority empowered to inoculate animals (or designated agent of such an authority), stating the pet has received all inoculations required by applicable state and local law;
  - c. pet being neutered/spayed if no evidence exists in tenant file.
7. The pet must be registered with the Authority each year at the time of the tenant's annual re-examination.
8. The pet shall not be allowed to interfere with the peaceful enjoyment of other residents or neighbors by barking, howling, biting, scratching or other such activities.
9. The resident shall comply with all municipal, city, or county codes regarding pet ownership.
10. Other:
  - a. Pet must wear an ID collar at all times
  - b. Resident may not alter patio or yard area
  - c. Residents must provide the Housing Authority with two (2) emergency contact numbers if required for care of pet
  - d. Resident must provide the Housing Authority with the name and address and telephone number of the pet's veterinarian
  - e. Resident must not feed strays. Strays will be considered keeping a pet without permission.
  - f. More than two written neighbor complaints regarding two incidents in a six month period shall result in the removal of the pet
  - g. Pet may not be kept outdoors.
  - h. Resident must own a vacuum cleaner and clean up pet residue (odor, hair, seeds, feathers, water) daily.
  - i. The Tacoma Housing Authority shall not be held responsible for illnesses caused to animal due to routine extermination procedures.

Failure by the resident to adhere to the terms of this Agreement or any pet whose conduct or condition is duly determined by the Housing Authority to constitute a nuisance or a threat to the health and safety of the other occupants or of other persons in the community shall result in a tenant being responsible for permanently removing the pet from the Housing Authority's premises.

Management and resident agree to utilize the Grievance Procedure described in the Lease



Agreement to resolve any dispute between the resident and management regarding the pet.

Contact persons who will keep the pet in case of emergency:

Name \_\_\_\_\_ Address \_\_\_\_\_ Phone \_\_\_\_\_

Name \_\_\_\_\_ Address \_\_\_\_\_ Phone \_\_\_\_\_

Veterinarian:

Name \_\_\_\_\_ Address \_\_\_\_\_ Phone \_\_\_\_\_

\_\_\_\_\_  
Resident Date

\_\_\_\_\_  
Property Manager (THA) Date