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PHA 5-Year and Annual Plan	U.S. Department of Housing and Urban Development Office of Public and Indian Housing	OMB No. 2577-0226 Expires 4/30/2011
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1.0	PHA Information PHA Name: <u>Housing Authority and Urban Renewal Agency of Polk County dba West Valley Housing Authority</u> PHA Code: <u>OR008</u> PHA Type: <input type="checkbox"/> Small <input checked="" type="checkbox"/> High Performing <input type="checkbox"/> Standard <input type="checkbox"/> HCV (Section 8) PHA Fiscal Year Beginning: (MM/YYYY): <u>10/2009</u>				
2.0	Inventory (based on ACC units at time of FY beginning in 1.0 above) Number of PH units: <u>378</u> Number of HCV units: <u>699</u>				
3.0	Submission Type <input type="checkbox"/> 5-Year and Annual Plan <input checked="" type="checkbox"/> Annual Plan Only <input type="checkbox"/> 5-Year Plan Only				
4.0	PHA Consortia <input type="checkbox"/> PHA Consortia: (Check box if submitting a joint Plan and complete table below.)				
	Participating PHAs	PHA Code	Program(s) Included in the Consortia	Programs Not in the Consortia	No. of Units in Each Program
	PHA 1:				PH HCV
	PHA 2:				
	PHA 3:				
5.0	5-Year Plan. Complete items 5.1 and 5.2 only at 5-Year Plan update.				
5.1	Mission. State the PHA's Mission for serving the needs of low-income, very low-income, and extremely low income families in the PHA's jurisdiction for the next five years: <u>N/A – Annual Plan Only</u>				
5.2	Goals and Objectives. Identify the PHA's quantifiable goals and objectives that will enable the PHA to serve the needs of low-income and very low-income, and extremely low-income families for the next five years. Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5-Year Plan. <u>N/A – Annual Plan Only</u>				
6.0	PHA Plan Update (a) Identify all PHA Plan elements that have been revised by the PHA since its last Annual Plan submission: <u>See Attachment 6 (a) & (b)</u> (b) Identify the specific location(s) where the public may obtain copies of the 5-Year and Annual PHA Plan. For a complete list of PHA Plan elements, see Section 6.0 of the instructions.				
7.0	Hope VI, Mixed Finance Modernization or Development, Demolition and/or Disposition, Conversion of Public Housing, Homeownership Programs, and Project-based Vouchers. Include statements related to these programs as applicable. <u>N/A – Hope VI, Mixed Finance Modernization or Development, Demolition and/or Disposition, Conversion of Public Housing, and Project-based Vouchers. See Attachment 7.0 Homeownership Programs</u>				
8.0	Capital Improvements. Please complete Parts 8.1 through 8.3, as applicable.				
8.1	Capital Fund Program Annual Statement/Performance and Evaluation Report. As part of the PHA 5-Year and Annual Plan, annually complete and submit the <i>Capital Fund Program Annual Statement/Performance and Evaluation Report</i> , form HUD-50075.1, for each current and open CFP grant and CFFP financing. <u>See Attachment 8.1 for CFG 2006, CFG 2007 & CFG 2008 Performance and Evaluation Reports as a separate file.</u>				
8.2	Capital Fund Program Five-Year Action Plan. As part of the submission of the Annual Plan, PHAs must complete and submit the <i>Capital Fund Program Five-Year Action Plan</i> , form HUD-50075.2, and subsequent annual updates (on a rolling basis, e.g., drop current year, and add latest year for a five year period). Large capital items must be included in the Five-Year Action Plan. <u>See Attachment 8.2 for the CFG 2009 Annual Statement and the Capital Fund Program Five-Year Action Plan as a separate file.</u>				
8.3	Capital Fund Financing Program (CFFP). <input type="checkbox"/> Check if the PHA proposes to use any portion of its Capital Fund Program (CFP)/Replacement Housing Factor (RHF) to repay debt incurred to finance capital improvements. <u>N/A – At this time.</u>				
9.0	Housing Needs. Based on information provided by the applicable Consolidated Plan, information provided by HUD, and other generally available data, make a reasonable effort to identify the housing needs of the low-income, very low-income, and extremely low-income families who reside in the jurisdiction served by the PHA, including elderly families, families with disabilities, and households of various races and ethnic groups, and other families who are on the public housing and Section 8 tenant-based assistance waiting lists. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. <u>N/A – Annual Plan Only & High Performer Agency</u>				

9.1	<p>Strategy for Addressing Housing Needs. Provide a brief description of the PHA’s strategy for addressing the housing needs of families in the jurisdiction and on the waiting list in the upcoming year. Note: Small, Section 8 only, and High Performing PHAs complete only for Annual Plan submission with the 5-Year Plan. <u>N/A – Not a 5-Year Plan Submission</u></p>
10.0	<p>Additional Information. Describe the following, as well as any additional information HUD has requested.</p> <p>(a) Progress in Meeting Mission and Goals. Provide a brief statement of the PHA’s progress in meeting the mission and goals described in the 5-Year Plan. <u>See Attachment 10.0 (a)</u></p> <p>(b) Significant Amendment and Substantial Deviation/Modification. Provide the PHA’s definition of “significant amendment” and “substantial deviation/modification” <u>See Attachment 10.0 (b)</u></p>
11.0	<p>Required Submission for HUD Field Office Review. In addition to the PHA Plan template (HUD-50075), PHAs must submit the following documents. Items (a) through (g) may be submitted with signature by mail or electronically with scanned signatures, but electronic submission is encouraged. Items (h) through (i) must be attached electronically with the PHA Plan. Note: Faxed copies of these documents will not be accepted by the Field Office.</p> <p>(a) Form HUD-50077, <i>PHA Certifications of Compliance with the PHA Plans and Related Regulations</i> (which includes all certifications relating to Civil Rights)</p> <p>(b) Form HUD-50070, <i>Certification for a Drug-Free Workplace</i> (PHAs receiving CFP grants only)</p> <p>(c) Form HUD-50071, <i>Certification of Payments to Influence Federal Transactions</i> (PHAs receiving CFP grants only)</p> <p>(d) Form SF-LLL, <i>Disclosure of Lobbying Activities</i> (PHAs receiving CFP grants only)</p> <p>(e) Form SF-LLL-A, <i>Disclosure of Lobbying Activities Continuation Sheet</i> (PHAs receiving CFP grants only)</p> <p>(f) Resident Advisory Board (RAB) comments. Comments received from the RAB must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the recommendations and the decisions made on these recommendations.</p> <p>(g) Challenged Elements</p> <p>(h) Form HUD-50075.1, <i>Capital Fund Program Annual Statement/Performance and Evaluation Report</i> (PHAs receiving CFP grants only)</p> <p>(i) Form HUD-50075.2, <i>Capital Fund Program Five-Year Action Plan</i> (PHAs receiving CFP grants only)</p>

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

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

Instructions form HUD-50075

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

1.0 PHA Information

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

2.0 Inventory

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

3.0 Submission Type

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

4.0 PHA Consortia

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

5.0 Five-Year Plan

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

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

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

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

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

PHA Plan Elements. (24 CFR 903.7)

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

2. **Financial Resources.** A statement of financial resources, including a listing by general categories, of the PHA's anticipated resources, such as PHA Operating, Capital and other anticipated Federal resources available to the PHA, as well as tenant rents and other income available to support public housing or tenant-based assistance. The statement also should include the non-Federal sources of funds supporting each Federal program, and state the planned use for the resources.
3. **Rent Determination.** A statement of the policies of the PHA governing rents charged for public housing and HCV dwelling units.
4. **Operation and Management.** A statement of the rules, standards, and policies of the PHA governing maintenance management of housing owned, assisted, or operated by the public housing agency (which shall include measures necessary for the prevention or eradication of pest infestation, including cockroaches), and management of the PHA and programs of the PHA.
5. **Grievance Procedures.** A description of the grievance and informal hearing and review procedures that the PHA makes available to its residents and applicants.
6. **Designated Housing for Elderly and Disabled Families.** With respect to public housing projects owned, assisted, or operated by the PHA, describe any projects (or portions thereof), in the upcoming fiscal year, that the PHA has designated or will apply for designation for occupancy by elderly and disabled families. The description shall include the following information: **1)** development name and number; **2)** designation type; **3)** application status; **4)** date the designation was approved, submitted, or planned for submission, and; **5)** the number of units affected.
7. **Community Service and Self-Sufficiency.** A description of: **(1)** Any programs relating to services and amenities provided or offered to assisted families; **(2)** Any policies or programs of the PHA for the enhancement of the economic and social self-sufficiency of assisted families, including programs under Section 3 and FSS; **(3)** How the PHA will comply with the requirements of community service and treatment of income changes resulting from welfare program requirements. **(Note: applies to only public housing).**
8. **Safety and Crime Prevention.** For public housing only, describe the PHA's plan for safety and crime prevention to ensure the safety of the public housing residents. The statement must include: (i) A description of the need for measures to ensure the safety of public housing residents; (ii) A description of any crime prevention activities conducted or to be conducted by the PHA; and (iii) A description of the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities.

9. **Pets.** A statement describing the PHAs policies and requirements pertaining to the ownership of pets in public housing.
10. **Civil Rights Certification.** A PHA will be considered in compliance with the Civil Rights and AFFH Certification if: it can document that it examines its programs and proposed programs to identify any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with the local jurisdiction to implement any of the jurisdiction's initiatives to affirmatively further fair housing; and assures that the annual plan is consistent with any applicable Consolidated Plan for its jurisdiction.
11. **Fiscal Year Audit.** The results of the most recent fiscal year audit for the PHA.
12. **Asset Management.** A statement of how the agency will carry out its asset management functions with respect to the public housing inventory of the agency, including how the agency will plan for the long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs for such inventory.
13. **Violence Against Women Act (VAWA).** A description of: 1) Any activities, services, or programs provided or offered by an agency, either directly or in partnership with other service providers, to child or adult victims of domestic violence, dating violence, sexual assault, or stalking; 2) Any activities, services, or programs provided or offered by a PHA that helps child and adult victims of domestic violence, dating violence, sexual assault, or stalking, to obtain or maintain housing; and 3) Any activities, services, or programs provided or offered by a public housing agency to prevent domestic violence, dating violence, sexual assault, and stalking, or to enhance victim safety in assisted families.

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

- (a) **Hope VI or Mixed Finance Modernization or Development.** 1) A description of any housing (including project number (if known) and unit count) for which the PHA will apply for HOPE VI or Mixed Finance Modernization or Development; and 2) A timetable for the submission of applications or proposals. The application and approval process for Hope VI, Mixed Finance Modernization or Development, is a separate process. See guidance on HUD's website at: <http://www.hud.gov/offices/pih/programs/ph/hope6/index.cfm>
- (b) **Demolition and/or Disposition.** With respect to public housing projects owned by the PHA and subject to ACCs under the Act: (1) A description of any housing (including project number and unit numbers [or addresses]), and the number of affected units along with their sizes and accessibility features) for which the PHA will apply or is currently pending for demolition or disposition; and (2) A timetable for the demolition or disposition. The application and approval process for demolition and/or disposition is a separate process. See guidance on HUD's website at: http://www.hud.gov/offices/pih/centers/sac/demo_dispo/index.cfm
Note: This statement must be submitted to the extent that approved and/or pending demolition and/or disposition has changed.
- (c) **Conversion of Public Housing.** With respect to public housing owned by a PHA: 1) A description of any building or buildings (including project number and unit count) that the PHA is required to convert to tenant-based assistance or

that the public housing agency plans to voluntarily convert; 2) An analysis of the projects or buildings required to be converted; and 3) A statement of the amount of assistance received under this chapter to be used for rental assistance or other housing assistance in connection with such conversion. See guidance on HUD's website at: <http://www.hud.gov/offices/pih/centers/sac/conversion.cfm>

- (d) **Homeownership.** A description of any homeownership (including project number and unit count) administered by the agency or for which the PHA has applied or will apply for approval.
- (e) **Project-based Vouchers.** If the PHA wishes to use the project-based voucher program, a statement of the projected number of project-based units and general locations and how project basing would be consistent with its PHA Plan.

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

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

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

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

1. At the end of the program year; until the program is completed or all funds are expended;
2. When revisions to the Annual Statement are made, which do not require prior HUD approval, (e.g., expenditures for emergency work, revisions resulting from the PHAs application of fungibility); and
3. Upon completion or termination of the activities funded in a specific capital fund program year.

8.2 Capital Fund Program Five-Year Action Plan

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

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

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

<http://www.hud.gov/offices/pih/programs/ph/capfund/cffp.cfm>

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

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

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

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

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

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

- (a) Form HUD-50077, *PHA Certifications of Compliance with the PHA Plans and Related Regulations*
- (b) Form HUD-50070, *Certification for a Drug-Free Workplace (PHAs receiving CFP grants only)*
- (c) Form HUD-50071, *Certification of Payments to Influence Federal Transactions (PHAs receiving CFP grants only)*
- (d) Form SF-LLL, *Disclosure of Lobbying Activities (PHAs receiving CFP grants only)*
- (e) Form SF-LLL-A, *Disclosure of Lobbying Activities Continuation Sheet (PHAs receiving CFP grants only)*
- (f) Resident Advisory Board (RAB) comments.
- (g) Challenged Elements. Include any element(s) of the PHA Plan that is challenged.
- (h) Form HUD-50075.1, *Capital Fund Program Annual Statement/Performance and Evaluation Report (Must be attached electronically for PHAs receiving CFP grants only)*. See instructions in 8.1.
- (i) Form HUD-50075.2, *Capital Fund Program Five-Year Action Plan (Must be attached electronically for PHAs receiving CFP grants only)*. See instructions in 8.2.

Attachment 6 (a) & (b)

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

PHA Plan Elements. (24 CFR 903.7)

1. **Eligibility, Selection and Admissions Policies, including Deconcentration and Wait List Procedures.** Section 8 Administrative Plan revisions being made and implemented: (1) to address the process used by WVHA for the order of termination of Section 8 participants due to either over-leasing of WVHA baseline number of units and/or funding limitations; (2) to provide for admission local preference with higher weight for those participant families who have been terminated due to either over-leasing of WVHA baseline number of units and/or funding limitations and who have to reapply for assistance during the calendar year. No other revisions – See Section 8 Administrative Plan to be adopted May 27, 2009.
2. **Financial Resources.** The only significant revision in financial resources is the additional \$778,062 Capital Funds provided through the American Recovery and Reinvestment Act (ARRA) of 2009. These funds are being used for physical improvements previously identified in our Capital Fund Five-Year Plan. See the HUD-approved ARRA Grant Annual Statement available in the back-up documents.
3. **Rent Determination.** No changes made to WVHA policies for rent determination.
4. **Operation and Management.** WVHA anticipates making changes in operation and management of our Public Housing program by implementing a phase-in approach to begin providing “smoke free” buildings or “smoke free” floors in our properties. WVHA is planning to complete a survey of our Public Housing residents first and then develop our plan to progress toward making most, if not all, of our public housing to become “smoke free”. It is also anticipated that it will be phased-in and will take a few years before all of our properties will be “smoke free”.
5. **Grievance Procedures.** WVHA adopted a new Public Housing Grievance Procedure effective May 1, 2009. Most revisions were to update the procedure to match the organizational changes that have occurred at WVHA over the past couple of years. See the Public Housing Grievance Procedure available in the back-up documents for details.
6. **Designated Housing for Elderly and Disabled Families.** No changes.
7. **Community Service and Self-Sufficiency.** No changes.
8. **Safety and Crime Prevention.** No changes.
9. **Pets.** No changes.
10. **Civil Rights Certification.** No changes. However, WVHA did have a Civil Rights and 504 Accessibility Review during 2008 and closed the one item of finding by approving a “504 Grievance Procedure” and that document is available in the back-up documents and is available on the WVHA website.
11. **Fiscal Year Audit.** The fiscal year audit for September 30, 2008 is still in progress and we will update the agency plan when that audit is complete.
12. **Asset Management.** WVHA submitted a year three “Stop Loss” application in October 2008 demonstrating our conversion to Asset Management. That application determined that WVHA failed to meet the following criteria:
 - Criterion 1 – Project Based Accounting (This was based upon the fact that WVHA did not have a full prior 12 months of project based financials and the financials submitted did not include Per Unit Month [PUM] amounts for additional analysis. Although WVHA had fully implemented Project Based Accounting by the fiscal year end of September 30, 2008, the requirement was to have the prior 12 months financials completed under Project Based Accounting.)
 - Criterion 3 – Central Office Cost Center (COCC) (This was based upon a determination that WVHA had not fully demonstrated that the Central Office Cost Center can operate on the allowable fees and other permitted reimbursements as well as revenue generated from non-public housing programs. WVHA has a very small non-public housing program and it cannot afford to make significant contributions to the Central Office Cost Center. The reviewer determined that one position that had been designated to Section 8 had to be included in the COCC. These additional costs for the COCC would put the COCC into a deficit position.)
 - Criterion 4 – Centralized Services (Item b. & d. The fail was based upon a determination that WVHA planned to keep major procurement centralized and charge a fee for service for those services. The reviewer's determination was that WVHA's COCC can only charge a direct reimbursement based upon actual hourly costs and actual time spent for the Construction Project Coordinator's procurement of maintenance contracts for the AMPs.)

WVHA passed the Asset Management evaluation for all other Criteria:

- Criterion 2 – Project-Based Management
- Criterion 4 – Centralized Services (Items a & c: The reviewer did make the determination that WVHA did appropriately designate centralized functions using a fee-for-service approach and that the centralized services were consistent with the needs of, and are in the best interests of, the projects.)
- Criterion 5 – Review of Project Performance
- Criterion 6 – Long-term Capital Planning

Based upon the failure to meet “Stop Loss” for year three, WVHA is evaluating the options of whether further changes in order to meet HUD’s prescriptive criterion to be approved as having fully implemented Asset Based Management is in the best interest of WVHA or whether WVHA would be better served by opting out of HUD’s Asset Management. WVHA currently would only have the option to opt out for Calendar Year 2009 unless Congress passed legislation that would permit agencies with between 250 – 400 units the ability to opt out on an on-going basis.

13. **Violence Against Women Act (VAWA).** No Changes. A description of:

1) Any activities, services, or programs provided or offered by an agency, either directly or in partnership with other service providers, to child or adult victims of domestic violence, dating violence, sexual assault, or stalking – (SABLE (Safe from Abuse and Battered Living Environments) HOUSE is a local non-profit, community-supported agency whose mission is to eliminate domestic and sexual violence by providing comprehensive services to victims and their children in Polk County, Oregon. Sable House services include safe shelter, 24-hour crisis hotline, in-person sexual assault response, support groups, information and referral, community resource advocacy and community outreach and education. Sable House provides services to women and their children in an effort to increase their safety and to empower them with information, support, and education. Sable House’ goal is to offer these services so that victims are fully aware of their options and can make informed choices about their lives. Sable House services empower women to help themselves. Sable also provides outreach and educational services to the Polk County Community about domestic violence and sexual assault and the services that are available to address these serious issues.)

2) Any activities, services, or programs provided or offered by a PHA that helps child and adult victims of domestic violence, dating violence, sexual assault, or stalking, to obtain or maintain housing – (West Valley Housing Authority has adopted a local preference for the Section 8 Housing Choice Voucher Program for victims of domestic violence who meet certain criteria, provided the identified abuser is not a member of the applicant family. [See the Section 8 Administrative Plan, Chapter 4, Section C. 2.] This local preference and the criteria for qualifying for the preference were the result of collaboration with SABLE House to assist victims of domestic violence to obtain and maintain housing of their own separate from the abuser.) ; and

3) Any activities, services, or programs provided or offered by a public housing agency to prevent domestic violence, dating violence, sexual assault, and stalking, or to enhance victim safety in assisted families - (At the family’s request, West Valley Housing Authority will take precautions to ensure that the new location of the family is concealed in cases of domestic abuse. In addition, West Valley Housing Authority designated in the Section 8 Administrative Plan under Chapter 4, Section G, Voucher Issuance Determination for Split Households, that: (a) if only one portion of the family has minor children, then that portion of the family will continue to keep the Voucher for assistance; (b) if both portions of the family have minor children, WVHA will take into consideration whether domestic violence was involved in the breakup and whether there is a recommendation from other social service professions. This can enable victims of domestic violence to maintain housing assistance even if the abuser is still residing in the previously assisted dwelling unit. In early 2007, West Valley Housing Authority provided notification to all our Public Housing residents, all our Section 8 participants, and to all our applicants of the VAWA and their rights under that Act. We are also providing that same notification to all new applicants to make sure that they are aware of the protections provided. WVHA staff are provided information about the services offered by SABLE House and they regularly make referrals when clients might be in need of those services. WVHA maintains a supply of information brochures from SABLE House available in our office lobby for all clients, landlords, and interested persons.

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

WVHA’s 5-Year and Annual Plan may be obtained by the public at the main office (204 SW Walnut Avenue, Dallas, OR 97338), at the Pioneer Village Office (375 Taybin Road NW, Salem, OR 97304), at the Kingwood West Office (1947 Salem-Dallas Hwy NW, Salem, OR 97304), and on the WVHA website (www.wvpha.org). The Resident Advisory Board is also provided copies of the 5-Year and Annual Plan.

ATTACHMENT 7.0 HOMEOWNERSHIP PROGRAMS

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

(if applicable) [24 CFR Part 903.12(c), 903.7(k)(1)(i)]

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

2. Program Description:

a. Size of Program

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

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

5

b. PHA-established eligibility criteria

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

If yes, list criteria:

- Must be a current Public Housing resident or a participant in WVHA’s Housing Choice Voucher Program.
- Must be an active Family Self-Sufficiency participant.
- Must have income greater than 50% but less than 80% of the area median income.
- Must be a first time homebuyer (or have not owned a home in the past three years.)
- Must be able to provide good references from current and prior landlords regarding care of the dwelling unit.
- Must have legal permanent residence in the U.S.
- Must be Mortgage ready: have good credit and no bankruptcies within the past five years.
- Must have successfully completed “Financial Literacy” workshop.
- Must have successfully completed “ABCs of Homebuying” workshop.
- Must have a minimum down payment of at least 3 percent of the purchase price and at least 1 percent of the purchase price must come from the family’s own resources.

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

- Prepare the action plan for HUD review.
- Contact and work with lenders to gain support for the program.
- Begin the outreach with the participants of the Family Self-Sufficiency Program and to participants with disabilities who might also qualify

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

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

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

- WVHA partners with Polk CDC to provide a Housing Resource Center in Polk County to assist with first time homebuyer education and housing information and referral.
- WVHA partners with Polk CDC for a “Lease-To-Own” program currently.
- WVHA partners with Polk CDC for “Financial Literacy” and “ABCs of Homebuying” workshops.

WVHA PARTICIPATES IN A COLLABORATIVE EFFORT FOR “VALLEY INDIVIDUAL DEVELOPMENT ACCOUNTS” WHERE ELIGIBLE PARTICIPANTS CAN GET MATCHED SAVINGS FUNDS FOR THE DOWN PAYMENT ON PURCHASE OF A HOME.

Attachment 8.1 for CFG 2006, CFG 2007 & CFG 2008 Performance and Evaluation Reports

See the attachment as a separate file.

Attachment 8.2 for the CFG 2009 Annual Statement and the Capital Fund Program Five-Year Action Plan

See the attachment as a separate file.

Attachment 10.0 Additional Information

(a) Progress in Meeting Mission and Goals. Provide a brief statement of the PHA's progress in meeting the mission and goals described in the 5-Year Plan.

West Valley Housing Authority (WVHA)
Progress in Meeting the Mission and Goals

- PHA Goal: Expand the supply of assisted housing
 - Reduced public housing vacancies and maintained below a 3% vacancy rate; last quarterly report for year-to-date vacancy rates were: Pioneer Village AMP (.68%); Kingwood West AMP (.82%) (both AMPs less than 1% vacancy rate); and, the Dallas/Independence AMP (2.16%), showing all AMPs met the goal!
 - West Valley Housing Authority has continued to partner with Polk CDC to foster development of additional affordable housing and has provided Section 8 local preferences for two new transitional housing developments that house chronically mentally ill persons. Without the Section 8 local preference the developments would not have been financially feasible.
- PHA Goal: Improve the quality of assisted housing
 - WVHA continued as a "High Performer" status rating for the operation of the Public Housing Program. The FY2007 score was 96% and HUD is using the Physical Inspection Component for FY2008, which has been carried over due to our high score status. Many physical improvements were accomplished with the Capital Fund Program and much progress has been made with tenant education related to not blocking fire egress in their own apartments and not tampering with smoke detectors. Those areas helped us improve our Physical Inspection scores as we had no exigent health and safety violations with our HUD-REAC UPCS inspections for FY2007.
 - WVHA maintained our Section Eight Management Assessment Program (SEMAP) "High Performer" status with a score of 100% for FY2008.
 - WVHA has made good progress with renovating public housing units with the Capital Fund Program. We also accomplished getting an updated Energy Audit and a full Physical Needs Assessment (PNA), both meeting investment grade standards. This has given us very comprehensive data for our projections for the next 20 year needs for our Public Housing units.
 - Decisions have been delayed for applying to dispose of any of the agency's single-family houses due to the current housing market conditions. Therefore, no replacement public housing is needed yet.
- PHA Goal: Increase assisted housing choices
 - Voucher mobility counseling has been most successful since we continually have many participant families using portability to move to the more urban neighboring community of Salem, Oregon. Many of the moves are related to employment issues.
 - WVHA continues the collaborative effort with Polk CDC for a Housing Resource Center for Polk County to promote and foster homeownership for lower income families. WVHA's Voucher Homeownership Program has been delayed due to our current over-leased situation with our Housing Choice Vouchers.
- PHA Goal: Provide an improved living environment
 - WVHA has ensured the accessibility of our public housing units in accordance with Section 504 requirements and passed a Section 504 HUD review in 2008 with only one finding. The one finding was resolved with the adoption of a 504 Grievance Procedure. There were no findings for the physical accessibility issues and WVHA has met the requirement for 5% of our public housing units to have been remodeled to meet the Uniform Federal Accessibility Standards.
- PHA Goal: Promote self-sufficiency and asset development of assisted households
 - WVHA continues to meet the established Family Self-Sufficiency goals and continues to assist families in becoming self-sufficient by encouraging the use of the "Valley Individual Development Accounts" (VIDA) for matched savings to assist with home purchase down payment funds. WVHA continues the collaborative effort with Polk CDC for a Housing Resource Center for Polk County to promote and foster homeownership for lower income families. WVHA had three families who moved to home ownership during 2008 and early 2009 and all three families participated in the VIDA Program that provided their down payment assistance. One of those families was a Section 8 FSS participant; one family was from the Public Housing Program; and one family was a Section 8 participant that had not been on the FSS program.
- PHA Goal: Ensure equal opportunity and affirmatively further fair housing
 - WVHA continues to undertake affirmative measures to provide assisted housing free from discrimination. WVHA had a HUD Civil Rights Review during 2008 and had no findings! This is a demonstration of the efforts that are made by WVHA on an on-going basis.
- PHA Goal: Improve communications between management and residents
 - Periodic newsletters have continued to provide information to residents on a regular basis.
 - A new Public Housing Survey is going out shortly to assess the desires of the residents in making our properties "smoke free".
 - WVHA has been very diligent in getting written information out to residents before all construction work and the residents have been most appreciative of being kept informed.

(b) Significant Amendment and Substantial Deviation/Modification. Provide the PHA's definition of "significant amendment" and "substantial deviation/modification" - West Valley Housing Authority's definitions are listed below:

- Substantial Deviation from the 5-Year Plan:
 - Any change to the stated Mission of the agency
 - Any revisions to the HUD Strategic Goals that relate to Demolition, Disposal, or Conversion of Public Housing Units.

- Significant Amendment or Modification to the Annual Plan:
 - Changes of a significant nature to the rent or admissions policies, including any revision to local preferences on the waiting lists.
 - Any change with regard to demolition or disposition, designation, home ownership programs or conversion activities.
 - The addition of non-emergency work items (items not included in the current Annual Statement or Five Year Capital Fund Plan) or change in the use of replacement reserve funds under the Capital Fund.

- Revisions that **will not be** considered a “substantial deviation” or a “significant amendment or modification” are:
 - Changes to any of the items listed above that are being adopted to reflect changes in HUD regulatory requirements.
 - Changes to any category not included above.
 - Revisions to any attachments to the Agency Plan that would not be a change to any items included above.

Attachment 8.1

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

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226

Expires 4/30/2011

Part I: Summary					
PHA Name: WEST VALLEY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: OR16P00850106 Date of CFFP: N/A		FFY of Grant: 2006 FFY of Grant Approval: 2006	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: <u>3</u>)		<input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: March 31, 2009 <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-CFP Funds				
2	1406 Operations	114,694.56	116,626.66	114,799.08	113,917.08
3	1408 Management Improvements Soft	7,000.00	2,000.00	1,339.07	1,339.07
4	1410 Administration	59,937.00	59,937.00	59,937.00	59,937.00
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	30,000.00	25,201.50	16,721.20	16,721.20
8	1440 Site Acquisition				
9	1450 Site Improvement	79,507.62	83,006.52	82,049.34	82,049.34
10	1460 Dwelling Structures	130,724.04	135,522.54	133,890.49	133,890.49
11	1465.1 Dwelling Equipment—Nonexpendable	39,675.00	33,795.00	33,795.00	33,795.00
12	1470 Nondwelling Structures	131,838.78	138,287.78	138,287.78	131,838.78
13	1475 Nondwelling Equipment	5,000.00	5,000.00	499.98	499.98
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	1,000.00	0.00	0.00	0.00
18	1499 Development Activities				
19	1501 Collateralization of Debt Service				
20	1502 Contingency	0.00	0.00	0.00	0.00
21	Amount of Annual Grant: (sum of lines 2 - 20)	\$599,377.00	\$599,377.00	\$581,318.94	\$573,987.94
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance	111,838.78	111,838.78	111,838.78	111,838.78
24	Amount of line 21 Related to Security –Soft Costs				
25	Amount of Line 21 related to Security-- Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

Attachment 8.1

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

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226

Expires 4/30/2011

Part I: Summary					
PHA Name: WEST VALLEY HOUSING AUTHORITY	Grant Type and Number Capital Fund Program Grant No: OR16P00850108 Replacement Housing Factor Grant No: Date of CFFP: N/A		FFY of Grant: 2008 FFY of Grant Approval: 2008		
Type of Grant					
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: <u>3</u>) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: March 31, 2009 <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
Signature of Executive Director		Date		Signature of Public Housing Director	

Attachment 8.1

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

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

Part II: Supporting Pages								
PHA Name: WEST VALLEY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: OR16P00850106 CFFP (Yes/No): Replacement Housing Factor Grant No: NO				Federal FY of Grant: 2006		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA-Wide	Operations	1406		114,694.56	116,626.66	114,799.08	113,917.08	revised estimate; in progress
HA-Wide	1) Training	1408		4,000.00	2,000.00	1,339.07	1,339.07	revised estimate; in progress
Management	2) Computer Software	1408		3,000.00	0.00	0.00	0.00	Postponed later date
Improvements	TOTALS	1408		\$7,000.00	\$2,000.00	\$1,339.07	\$1,339.07	
HA-Wide	Staff Salaries	1410		57,937.00	59,614.42	59,614.42	59,614.42	complete
HA-Wide	Sundry Items	1410		2,000.00	322.58	322.58	322.58	complete
	TOTALS	1410		\$59,937.00	\$59,937.00	\$59,937.00	\$59,937.00	
HA-Wide	Architect/Engineer fees and costs	1430		30,000.00	25,201.50	16,721.20	16,721.20	revised estimate; in progress
	TOTALS	1430		30,000.00	25,201.50	16,721.20	16,721.20	
HA-Wide	Computer equipment	1475		5,000.00	5,000.00	499.98	499.98	in progress
	TOTALS	1475		5,000.00	5,000.00	499.98	499.98	
HA-Wide	Replacement Reserves	1490		0.00	0.00	0.00	0.00	
HA-Wide	Relocation	1495	On-Demand	1,000.00	0.00	0.00	0.00	no longer needed
HA-Wide	Contingency	1502	On-Demand	0.00	0.00	0.00	0.00	
	TOTAL HA Wide			217,631.56	208,765.16	193,296.33	192,414.33	

Attachment 8.1

Capital Fund Financing Program

Expires 4/30/2011

Part II: Supporting Pages								
PHA Name: WEST VALLEY HOUSING AUTHORITY			Grant Type and Number Capital Fund Program Grant No: OR16P00850106 CFFP (Yes/No): Replacement Housing Factor Grant No: NO			Federal FY of Grant: 2006		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
OR 8-1 & OR 8-3 OR008810001 (AMP#) Pioneer Village I & II	Paving, Sidewalks	1450	3,000 sq. ft.	60,000.00	64,317.90	64,317.90	64,317.90	increased & complete
	Refrigerator Replacement	1465.1	50 count	39,675.00	33,795.00	33,795.00	33,795.00	decreased & complete
	TOTALS			\$99,675.00	\$98,112.90	\$98,112.90	\$98,112.90	
OR 8-6 OR008860001 (AMP#) Kingwood West	Reface social hall cabinets	1470	Social hall kitchen cabinets	0.00	6,449.00	6,449.00	0.00	moved forward from CFG 2008 Yr 1 & increased scope
	Add gutter toppers	1460	700 linear ft.	34,673.00	34,673.00	34,673.00	34,673.00	complete
	Paving, Sidewalks & Ramps	1450	400 sq. ft.	19,507.62	18,688.62	17,731.44	17,731.44	in progress
	TOTALS			\$54,180.62	\$59,810.62	\$58,853.44	\$52,404.44	
OR 8-2 OR008890001 (AMP#) Arbor Court	Roofs & gutter toppers	1460	400 linear ft.	33,581.04	33,581.04	33,581.04	33,581.04	complete
	Maintenance Shop Addition	1470	400 sq. ft.	20,000.00	20,000.00	20,000.00	20,000.00	complete
	TOTALS			\$53,581.04	\$53,581.04	\$53,581.04	\$53,581.04	
OR 8-5 OR008890001 (AMP#) LaCreole Manor	Asbestos abatement - units	1460	5 units	7,000.00	11,798.50	10,166.45	10,166.45	in progress
	Office (Accessibility/Reconfigure)	1470	1 Bldg	111,838.78	111,838.78	111,838.78	111,838.78	complete
	Roof Hatch/Cap Flashing R&R	1460	1 Bldg	49,675.00	49,675.00	49,675.00	49,675.00	complete
	TOTALS			\$168,513.78	\$173,312.28	\$171,680.23	\$171,680.23	
OR 8-7 OR008890001 (AMP#) Scattered Sites	HVAC Replacement	1460	2 Houses	5,795.00	5,795.00	5,795.00	5,795.00	complete
	TOTALS			\$5,795.00	\$5,795.00	\$5,795.00	\$5,795.00	
Overall Total				\$599,377.00	\$599,377.00	\$581,318.94	\$573,987.94	

Attachment 8.1

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

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

Part III: Implementation Schedule for Capital Fund Financing Program					
PHA Name: WEST VALLEY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program No: OR16P00850106 Replacement Housing Factor No:			Federal FFY of Grant: 2006
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)		All Funds Expended (Quarter Ending Date)		Reasons for Revised Target Dates
	Original Obligation End Date	Actual Obligation End Date	Original Expenditure End Date	Actual Expenditure End Date	
HA-WIDE	Jun-08		Dec-08		Remaining planned for late spring-early summer 2009
OR 8-1/3 Pioneer Village	Jun-08	Dec-08	Dec-08	Dec-08	Completed
OR 8-2 Arbor Court	Jun-07	Jun-07	Sep-07	Sep-07	Completed
OR 8-5 LaCreole Manor	Mar-08		Mar-08		Some asbestos abatement at turnovers remaining.
OR 8-6 Kingwood West	Jun-08		Dec-08		Remaining planned for late spring-early summer 2009
OR 8-7 Scattered Sites	Dec-07	Dec-07	Dec-07	Dec-07	Completed

Attachment 8.1

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

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226

Expires 4/30/2011

Part I: Summary					
PHA Name: WEST VALLEY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: OR16P00850107 Date of CFFP: N/A		FFY of Grant: 2007 FFY of Grant Approval: 2007	
Type of Grant <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no: ____) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: March 31, 2009 <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-CFP Funds				
2	1406 Operations	80,636.75	80,636.75	45,532.33	45,532.33
3	1408 Management Improvements Soft	3,000.00	3,000.00	0.00	0.00
4	1410 Administration	58,237.00	58,237.00	58,237.00	58,237.00
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	31,500.00	31,500.00	11,499.44	11,499.44
8	1440 Site Acquisition				
9	1450 Site Improvement	225,752.25	225,752.25	201,364.75	190,895.32
10	1460 Dwelling Structures	182,250.00	182,250.00	26,551.50	26,551.50
11	1465.1 Dwelling Equipment—Nonexpendable	0.00	0.00	0.00	0.00
12	1470 Nondwelling Structures	0.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	1,000.00	1,000.00	0.00	0.00
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18	1499 Development Activities				
18a	1501 Collateralization of Debt Service paid by the PHA				
18ba	9000 Collateralization or Debt Service paid Via System of Direct Payment				
19	1502 Contingency	0.00	0.00	0.00	0.00
20	Amount of Annual Grant: (sum of lines 2 - 20)	\$582,376.00	\$582,376.00	\$343,185.02	\$332,715.59
21	Amount of line 21 Related to LBP Activities				
22	Amount of line 21 Related to Section 504 compliance	23,750.00	23,750.00	23,750.00	23,750.00
23	Amount of line 21 Related to Security –Soft Costs				
24	Amount of Line 21 related to Security-- Hard Costs				
25	Amount of line 21 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

Attachment 8.1

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

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226

Expires 4/30/2011

Part I: Summary					
PHA Name: WEST VALLEY HOUSING AUTHORITY	Grant Type and Number Capital Fund Program Grant No: OR16P00850107 Replacement Housing Factor Grant No: Date of CFFP: N/A	FFY of Grant: 2007 FFY of Grant Approval: 2007			
Type of Grant <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input type="checkbox"/> Revised Annual Statement (revision no: __) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: <u>March 31, 2009</u> <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
	Signature of Executive Director	Date	Signature of Public Housing Director	Date	

Attachment 8.1

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

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

Part II: Supporting Pages								
PHA Name: WEST VALLEY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: OR16P00850107 CFFP (Yes/No): Replacement Housing Factor Grant No: NO				Federal FFY of Grant: 2007		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA-Wide	Operations	1406		80,636.75	80,636.75	45,532.33	45,532.33	in progress
HA-Wide	1) Training	1408		3,000.00	3,000.00	0.00	0.00	begin utilizing Apr '09
Management Improvements	2) Computer Software	1408		0.00	0.00	0.00	0.00	eliminated
	TOTALS			\$3,000.00	\$3,000.00	\$0.00	\$0.00	
HA-Wide	Staff Salaries	1410		58,237.00	58,237.00	58,237.00	58,237.00	complete
HA-Wide	TOTALS			\$58,237.00	\$58,237.00	\$58,237.00	\$58,237.00	
HA-Wide	Architect/Engineer fees and costs	1430		30,000.00	30,000.00	11,117.48	11,117.48	in progress
HA-Wide	Advertising/Bid Docs/ Printing	1430		1,500.00	1,500.00	381.96	381.96	in progress
HA-Wide	Computer equipment	1475		1,000.00	1,000.00	0.00	0.00	planned for later
HA-Wide	Replacement Reserves	1490						
HA-Wide	Relocation	1495	On-Demand	0.00	0.00	0.00	0.00	eliminated - no need
HA-Wide	Contingency	1502	On-Demand	0.00	0.00	0.00	0.00	
	TOTALS			\$32,500.00	\$32,500.00	\$11,499.44	\$11,499.44	
	TOTAL HA Wide			174,373.75	174,373.75	115,268.77	115,268.77	

Attachment 8.1

Part II: Supporting Pages								
PHA Name: WEST VALLEY HOUSING AUTHORITY			Grant Type and Number Capital Fund Program Grant No: OR16P00850107 CFFP (Yes/No): NO Replacement Housing Factor Grant No:			Federal FFY of Grant: 2007		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
OR 8-1 & OR 8-3								
OR008810001 (AMP#) Pioneer Village I & II	Cadet Heaters (remove baseboard heaters)	1460	25 units	0.00	0.00	0.00	0.00	postponed to later yr.
	Paving, Sidewalks	1450	550 s/ft.	10,000.00	10,000.00	0.00	0.00	begin Summer '09
	Refrigerator Replacement	1465.1	50 count	0.00	0.00	0.00	0.00	Moved forward to 2006 grant
	Fencing Replacement (unit back yards)	1450	5400 ft./80 units	208,000.00	208,000.00	196,112.50	185,643.07	in progress
	TOTALS				\$218,000.00	\$218,000.00	\$196,112.50	\$185,643.07
OR 8-6								
OR008860001 (AMP#) Kingwood West	Ramps & Foundation Repair	1460	1 - 2 Bldg	0.00	0.00	0.00	0.00	Determined not urgent; postponed indefinitely
	Paving/Sidewalks	1450	160 s/ft	0.00	0.00	0.00	0.00	Moved forward to 2006 grant
	TOTALS			\$0.00	\$0.00	\$0.00	\$0.00	
OR 8-2								
OR008890001 (AMP#) Arbor Court	Paving, Sidewalks	1450	350 s/ft	5,252.25	5,252.25	5,252.25	5,252.25	increased scope - done
	TOTALS			\$5,252.25	\$5,252.25	\$5,252.25	\$5,252.25	
OR 8-5								
OR008890001 (AMP#) La Creole Manor	New heating/cooling system (remove baseboard units;install check meters;install heat pumps)	1460	35 units	0.00	0.00	0.00	0.00	postponed to 2008, year 2 & 3 due to higher priority
	Paving Sidewalks	1450	275 s/ft	2,500.00	2,500.00	0.00	0.00	planned Summer '09
	Asbestos Abatement at Turnover	1460	3 units	8,500.00	8,500.00	2,551.50	2,551.50	increased need - in progress
	Exterior Siding/Deck Renovations	1460	1 Bldg	0.00	0.00	0.00	0.00	delayed to 2008 grant & revised scope
	Repair/replace retaining wall (hazardous)	1450	Part in '07 & part in '08	10,000.00	10,000.00	0.00	0.00	planned for summer '09
	Exterior Seal Building & Paint	1460	1 four-story building	100,000.00	100,000.00	250.00	250.00	planned for summer'09
	Awnings Replacement	1460	1 four-story building/'07 & '08 grants)	40,000.00	40,000.00	0.00	0.00	planned for late summer '09
TOTALS				\$161,000.00	\$161,000.00	\$2,801.50	\$2,801.50	
OR 8-7								
OR008890001 (AMP#) Scattered Sites	Accessible Bathroom Remodel	1460	1 Unit	23,750.00	23,750.00	23,750.00	23,750.00	completed
	Roofing - Storage Bldg	1470	1 Bldg	0.00	0.00	0.00	0.00	used Operating \$
	Paving/Sidewalks	1450	100 s/ft	0.00	0.00	0.00	0.00	postponed indefinitely
	TOTALS				\$23,750.00	\$23,750.00	\$23,750.00	\$23,750.00
Overall Total				\$582,376.00	\$582,376.00	\$343,185.02	\$332,715.59	

Attachment 8.1

Part II: Supporting Pages						
PHA Name: WEST VALLEY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: OR16P00850107 CFFP (Yes/No): Replacement Housing Factor Grant No: NO			Federal FFY of Grant: 2007	
Development Number	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost
Name/HA-Wide Activities				Original	Revised	Funds Obligated Funds Expended
						\$249,660.41

Attachment 8.1

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

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226

Expires 4/30/2011

Part I: Summary					
PHA Name: WEST VALLEY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: OR16P00850108 Date of CFFP: N/A		FFY of Grant: 2008 FFY of Grant Approval: 2008	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies		<input checked="" type="checkbox"/> Revised Annual Statement (revision no: <u>2</u>)			
<input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: March 31, 2009		<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-CFP Funds				
2	1406 Operations	30,712.00	30,712.00	0.00	0.00
3	1408 Management Improvements Soft	8,000.00	8,000.00	0.00	0.00
4	1410 Administration	73,467.00	73,467.00	61,467.00	25,611.25
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	49,500.00	49,500.00	4,548.00	3,897.57
8	1440 Site Acquisition				
9	1450 Site Improvement	112,000.00	112,000.00	0.00	0.00
10	1460 Dwelling Structures	140,000.00	310,000.00	0.00	0.00
11	1465.1 Dwelling Equipment—Nonexpendable	0.00	0.00	0.00	0.00
12	1470 Nondwelling Structures	170,000.00	0.00	0.00	0.00
13	1475 Nondwelling Equipment	28,000.00	28,000.00	22,300.00	22,300.00
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs	3,000.00	3,000.00	0.00	0.00
18	1499 Development Activities				
19	1501 Collateralization of Debt Service				
20	1502 Contingency	0.00	0.00	0.00	0.00
21	Amount of Annual Grant: (sum of lines 2 - 20)	\$614,679.00	\$614,679.00	\$88,315.00	51,808.82
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance	173,000.00	3,000.00	0.00	0.00
24	Amount of line 21 Related to Security –Soft Costs				
25	Amount of Line 21 related to Security-- Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures	0.00	0.00	0.00	0.00

Attachment 8.1

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

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226

Expires 4/30/2011

Part I: Summary					
PHA Name: WEST VALLEY HOUSING AUTHORITY	Grant Type and Number Capital Fund Program Grant No: OR16P00850108 Replacement Housing Factor Grant No: Date of CFFP: N/A			FFY of Grant: 2008 FFY of Grant Approval: 2008	
Type of Grant <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/ Emergencies <input checked="" type="checkbox"/> Revised Annual Statement (revision no: 2) <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: March 31, 2009 <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
Signature of Executive Director		Date	Signature of Public Housing Director		Date

Attachment 8.1

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

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

Part II: Supporting Pages								
PHA Name: WEST VALLEY HOUSING AUTHORITY		Grant Type and Number Capital Fund Program Grant No: OR16P00850108 CFFP (Yes/No): Replacement Housing Factor Grant No: NO				Federal FY of Grant: 2008		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA-Wide	Operations	1406		30,712.00	30,712.00	0.00	0.00	
HA-Wide Management	1) Training	1408		3,000.00	3,000.00	0.00	0.00	To begin May '09
Improvements Management	2) Computer Software	1408		0.00	0.00	0.00	0.00	eliminated
Improvements	3) D/I AMP Resident Services	1408		5,000.00	5,000.00	0.00	0.00	To begin April '09
	TOTALS	1408		\$8,000.00	\$8,000.00	\$0.00	\$0.00	
HA-Wide	10% to COCC for Planning & Admin.	1410		61,467.00	61,467.00	61,467.00	25,611.25	In progress
HA-Wide	Const. Project Coordinator In-house Design & Specifications	1410		12,000.00	12,000.00	0.00	0.00	To begin April '09 for prior period
	TOTALS	1410		\$73,467.00	\$73,467.00	\$61,467.00	\$25,611.25	
HA-Wide	Architect/Engineer fees and costs	1430		30,000.00	30,000.00	4,548.00	3,897.57	In progress
HA-Wide	Advertising/Bid Docs/ Printing	1430		1,500.00	1,500.00	0.00	0.00	To begin April '09
HA-Wide	Const. Project Coordinator - CFP Inspections & Supervision	1430		18,000.00	18,000.00	0.00	0.00	To begin April '09 for prior period
	TOTALS	1430		49,500.00	49,500.00	4,548.00	3,897.57	
HA-Wide	Computer equipment/Handheld Units for UPCS Inspections - All AMPs	1475		5,000.00	5,000.00	0.00	0.00	Delaying to winter '09
	TOTALS	1475		5,000.00	5,000.00	0.00	0.00	
HA-Wide	Replacement Reserves	1490		0.00	0.00	0.00	0.00	
HA-Wide	Relocation	1495	On-Demand	3,000.00	3,000.00	0.00	0.00	As needed
HA-Wide	Contingency	1502	On-Demand	0.00	0.00	0.00	0.00	eliminated
	TOTAL HA Wide			169,679.00	169,679.00	66,015.00	29,508.82	

Attachment 8.1

Capital Fund Financing Program

Expires 4/30/2011

Part II: Supporting Pages								
PHA Name: WEST VALLEY HOUSING AUTHORITY			Grant Type and Number Capital Fund Program Grant No: OR16P00850108 CFFP (Yes/No): Replacement Housing Factor Grant No: NO			Federal FY of Grant: 2008		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
OR 8-1 & OR 8-3 OR008810001 (AMP#) Pioneer Village I & II	Sidewalk Replacements	1450	1,500 s/ft.	15,000.00	15,000.00	0.00	0.00	planned for summer '09
	TOTALS			\$15,000.00	\$15,000.00	\$0.00	\$0.00	
OR 8-6 OR008860001 (AMP#) Kingwood West	Replace Maintenance Van	1475	1	23,000.00	23,000.00	22,300.00	22,300.00	Came in below budget
	Reface Social Hall Cabinets	1470		0.00	0.00	0.00	0.00	Moved to 2006 grant
	Add/build new accessible laundry room	1470	1 new bldg.	170,000.00	0.00	0.00	0.00	Moved to ARRA grant
	Repave East Side Parking Lot	1450	Approx. 1800 s/ft.	60,000.00	60,000.00	0.00	0.00	Planned for summer '09
	Replace Deteriorated Patio Dividers	1450	42 dividers	12,000.00	12,000.00	0.00	0.00	Planned for summer '09
	TOTALS			\$265,000.00	\$95,000.00	\$22,300.00	\$22,300.00	
OR 8-2 OR008890001 (AMP#) Arbor Court	Roof Beams - structural repair (dry rot)	1460		10,000.00	0.00	0.00	0.00	Reduced to Operating
	TOTALS			\$10,000.00	\$0.00	\$0.00	\$0.00	
OR 8-5 OR008890001 (AMP#) La Creole Manor	R & R Hi-rise Water Supply Lines for building	1460	60 units	0.00	180,000.00	0.00	0.00	Moved forward from 2008 grant, year 2
	Deck renovation/planter boxes	1460	45 units	90,000.00	90,000.00	0.00	0.00	Planned for fall '09
	Asbestos abatement at turnover (ceilings)	1460	Est. 2 units	5,000.00	5,000.00	0.00	0.00	At turnover
	Repair/replace retaining wall on the site	1450	Partial in 2007 & 2008 grants	25,000.00	25,000.00	0.00	0.00	Planned for summer '09
	Awnings Replacement	1460	1 four-story building/'07 & '08 grants)	20,000.00	20,000.00	0.00	0.00	Planned for fall '09
	TOTALS			\$140,000.00	\$320,000.00	\$0.00	\$0.00	
OR 8-7 OR008890001 (AMP#) Scattered Sites	Gutter Protection System (956 Monmouth)	1460	3 two-story bldgs.	15,000.00	15,000.00	0.00	0.00	Planned for summer '09
	TOTALS			\$15,000.00	\$15,000.00	\$0.00	\$0.00	
Overall Total				\$614,679.00	\$614,679.00	\$88,315.00	\$51,808.82	

Attachment 8.2

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

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226
 Expires 4/30/2011

Part I: Summary					
PHA Name: West Valley Housing Authority		Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: N/A Date of CFFP:			FFY of Grant: 2009 FFY of Grant Approval: 2009
Type of Grant <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"/> Performance and Evaluation Report for Period Ending: <input type="checkbox"/> Final Performance and Evaluation Report					
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost ¹	
		Original	Revised ²	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations (may not exceed 20% of line 21) ³	\$35,712			
3	1408 Management Improvements	\$6,000			
4	1410 Administration (may not exceed 10% of line 21)	\$73,467			
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$49,500			
8	1440 Site Acquisition				
9	1450 Site Improvement	\$47,500			
10	1460 Dwelling Structures	\$290,800			
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Non-dwelling Structures	\$80,200			
13	1475 Non-dwelling Equipment	\$24,500			
14	1485 Demolition				
15	1492 Moving to Work Demonstration				
16	1495.1 Relocation Costs	\$3,000			
17	1499 Development Activities ⁴				

¹ To be completed for the Performance and Evaluation Report.

² To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

³ PHAs with under 250 units in management may use 100% of CFP Grants for operations.

⁴ RHF funds shall be included here.

Attachment 8.2

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

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226
Expires 4/30/2011

Part I: Summary						
PHA Name: West Valley Housing Authority		Grant Type and Number Capital Fund Program Grant No: Replacement Housing Factor Grant No: N/A Date of CFFP:			FFY of Grant: 2009 FFY of Grant Approval: 2009	
Type of Grant						
<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"/> Performance and Evaluation Report for Period Ending:		<input type="checkbox"/> Final Performance and Evaluation Report				
Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost ¹		
		Original	Revised ²	Obligated	Expended	
18a	1501 Collateralization or Debt Service paid by the PHA					
18ba	9000 Collateralization or Debt Service paid Via System of Direct Payment					
19	1502 Contingency (may not exceed 8% of line 20)	\$4,000				
20	Amount of Annual Grant:: (sum of lines 2 - 19)	\$614,679				
21	Amount of line 20 Related to LBP Activities					
22	Amount of line 20 Related to Section 504 Activities					
23	Amount of line 20 Related to Security - Soft Costs					
24	Amount of line 20 Related to Security - Hard Costs	\$15,000				
25	Amount of line 20 Related to Energy Conservation Measures	\$80,000				
Signature of Executive Director			Signature of Public Housing Director		Date	
Date						

¹ To be completed for the Performance and Evaluation Report.

² To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

³ PHAs with under 250 units in management may use 100% of CFP Grants for operations.

⁴ RHF funds shall be included here.

Attachment 8.2

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

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226
Expires 4/30/2011

Part II: Supporting Pages								
PHA Name: West Valley Housing Authority		Grant Type and Number Capital Fund Program Grant No: CFFP (Yes/ No): Replacement Housing Factor Grant No: N/A			Federal FFY of Grant: 2009			
Development Number Name/PHA-Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised ¹	Funds Obligated ²	Funds Expended ²	
HA-Wide	Operations	1406		\$35,712				
HA-Wide Management Improvements	Computer software	1408		\$3,000				
	Training	1408		\$3,000				
HA-Wide Administrative	10% To COCC for planning and administration of CFG	1410		\$61,467				
HA-Wide	Const. Project Coordinator In-House Design & Specifications	1430		\$12,000				
HA-Wide	Architect/Engineering	1430		\$30,000				
HA-Wide	Const. Project Coordinator – Inspections & Supervision	1430	.50	\$18,000				
HA-Wide	Advertising/Printing	1430		\$1,500				
HA-Wide	Computer Equipment	1475		\$5,000				
HA-Wide	Relocation/Reasonable Accommodation Moves	1495.1		\$3,000				
HA-Wide	Contingency	1502		\$4,000				

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

² To be completed for the Performance and Evaluation Report.

Attachment 8.2

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

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226
Expires 4/30/2011

Part II: Supporting Pages								
PHA Name: West Valley Housing Authority			Grant Type and Number Capital Fund Program Grant No: OR16S00850108 CFFP (Yes/ No): Replacement Housing Factor Grant No: N/A			Federal FFY of Grant: 2009		
Development Number Name/PHA-Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised ¹	Funds Obligated ²	Funds Expended ²	
AMP# OR008810001 (OR 8-1 & OR 8-3) Pioneer Village	Paving, Striping and Sidewalks	1450	12,000 sq. ft.	\$100,000				
	Replace Riding Lawn Mower	1475	1	\$13,500				
AMP# OR008860001 (OR 8-6) Kingwood West	Replace Deadbolts and Rekey Units	1460	100 Units	\$15,000				
	Paint Exteriors	1460	9 Bldg.	\$63,100				
	Replace Refrigerators with Energy Star Models	1460	100 Units	\$50,000				
	Construct Weather Shelters	1470	4 Shelters	\$30,000				
AMP# OR008890001 (OR 8-5) LaCreole Manor	Replace Toilets with Water Saver Accessible Model	1460	60 Units	\$30,000				
	Asbestos Abatement at Turnovers – Ceilings	1460	Est. 2 Units	\$5,000				
	Purchase Small Tractor	1475	1	\$6,000				
	Replace Elevator Interior	1460	1	\$15,000				
	Replace Social Hall/Office Bldg. Heat Pump Units	1470	3	\$22,500				
	Paint Exterior of Social Hall/Office Building	1470	1 Bldg.	\$5,200				
	Repair Exterior Siding and Paint of Family Units	1460	3 Bldg.	\$112,700				
	Construct Weather Shelters	1470	2 Shelters	\$15,000				

Attachment 8.2

AMP # OR008890001 (OR 8-2) Arbor Court	Construct Weather Shelter	1470	1 Shelter	\$7,500				
AMP # OR008890001 OR 9-7 Scattered Sites	Construct Weather Shelter	1470	1 Shelter	\$7,500				

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

² To be completed for the Performance and Evaluation Report.

Attachment 8.2

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

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226
Expires 4/30/2011

Part III: Implementation Schedule for Capital Fund Financing Program					
PHA Name: West Valley Housing Authority				Federal FFY of Grant: 2009	
Development Number Name/PHA-Wide Activities	All Fund Obligated (Quarter Ending Date)		All Funds Expended (Quarter Ending Date)		Reasons for Revised Target Dates ¹
	Original Obligation End Date	Actual Obligation End Date	Original Expenditure End Date	Actual Expenditure End Date	
HA-Wide Operations					
HA-Wide Mgmt. Imp					
HA-Wide Administrative	Mar-2011		Mar-2013		
HA-Wide Fees & Costs	Mar-2011		Mar-2013		
HA-Wide Non-Dwelling Equipment	Mar-2011		Mar-2013		
HA-Wide Relocation Contingency	Mar-2011		Mar-2013		
OR008810001 (AMP#) OR 8-1&8-3 Pioneer Village I & II	Mar-2011		Mar-2013		
OR008860001 AMP# OR 8-6 Kingwood West	Mar-2011		Mar-2013		
OR008890001 (AMP#) OR 8-2 Arbor Court	Mar-2011		Mar-2013		
OR008890001 (AMP#) OR 8-5 LaCreole Manor	Mar-2011		Mar-2013		
OR008890001 (AMP#) OR 9-7 Scattered Sites	Mar-2011		Mar-2013		

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

Attachment 8.2 Continued

Capital Fund Program—Five-Year Action Plan

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

Part I: Summary						
PHA Name/Number		Locality (City/County & State)			<input type="checkbox"/> Original 5-Year Plan	<input type="checkbox"/> Revision No:
A.	Development Number and Name	Work Statement for Year 1 FFY 2009	Work Statement for Year 2 FFY 2010	Work Statement for Year 3 FFY 2011	Work Statement for Year 4 FFY 2012	Work Statement for Year 5 FFY 2013
	OR008810001 (AMP#) OR 8-1 & 8-3 Pioneer Village I & II		\$438,000	\$254,000	\$236,500	\$339,500
	OR008860001 AMP#) OR 8-6 Kingwood West		0	\$87,600	0	0
	OR008890001 (AMP#) OR 8-2 Arbor Court		0	\$77,400	0	0
	OR008890001 (AMP#) OR 8-5 LaCreole Manor		\$5,000	\$8000	\$140,000	\$105,000
	OR008890001 (AMP#) OR 9-7 Scattered Sites		0	0	\$68,000	0
B.	Physical Improvements Subtotal	Annual Statement	\$443,000	\$427,000	\$444,500	\$444,500
C.	Management Improvements		\$10,000	\$2,000	\$7,000	\$7,000
D.	PHA-Wide Non-dwelling Structures and Equipment		0	\$24,000	0	0
E.	Administration		\$73,467	\$73,467	\$73,467	\$73,467
F.	Other		\$56,500	\$62,500	\$62,000	\$62,000
G.	Operations		\$31,712	\$25,712	\$27,712	\$27,712
H.	Demolition		0	0	0	0
I.	Development		0	0	0	0
J.	Capital Fund Financing – Debt Service		0	0	0	0
K.	Total CFP Funds		\$614,679	\$614,679	\$614,679	\$614,679
L.	Total Non-CFP Funds		0	0	0	0
M.	Grand Total		\$614,679	\$614,679	\$614,679	\$614,679

Attachment 8.2 Continued

Capital Fund Program—Five-Year Action Plan

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

Part II: Supporting Pages – Physical Needs Work Statement(s)						
Work Statement for Year 1 FFY 2009	Work Statement for Year 2 FFY 2010			Work Statement for Year: 3 FFY 2011		
	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost
See	OR008810001 (AMP#) OR 8-1 & 8-3 Pioneer Village I & II			OR008810001 (AMP#) OR 8-1 & 8-3 Pioneer Village I & II		
	Paving, Striping & Sidewalks	9,600 sq. ft.	\$80,000	Paving, Striping & Sidewalks	3,600 sq. ft.	\$30,000
	Replace Baseboard Heaters with Cadet Heaters	160 Units	\$228,000	Maintenance Van Replacement	1	\$24,000
	Replace Windows, Entry Doors, Exterior Siding and Paint Exterior, Phase 1	40 Bldg.	\$130,000	Replace Windows, Entry Doors, Exterior Siding and Paint Exterior, Phase 2	40 Bldg.	\$200,000
Annual	OR008860001 AMP#) OR 8-6 Kingwood West	0		OR008860001 AMP#) OR 8-6 Kingwood West		
				Water Heater Replacement	3 Ea.	\$12,600
				Window Replacement	9 Bldg.	\$75,000
Statement	OR008890001 (AMP#) OR 8-2 Arbor Court	0		OR008890001 (AMP#) OR 8-2 Arbor Court		
				Repair & Paint Exteriors of Family Units	6 Bldg.	\$77,400
	OR008890001 (AMP#) OR 8-5 LaCreole Manor			OR008890001 (AMP#) OR 8-5 LaCreole Manor		
	Asbestos Abatement	Est. 2 Units	\$5,000	Asbestos Abatement	Est. 2 Units	\$5,000

Attachment 8.2 Continued

Capital Fund Program—Five-Year Action Plan

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

				Paving & Sidewalk Repairs	360 sq. ft.	\$3,000
	OR008890001 (AMP#) OR 9-7 Scattered Sites	0	0	OR008890001 (AMP#) OR 9-7 Scattered Sites		0
	Subtotal of Estimated Cost		\$443,000	Subtotal of Estimated Cost		\$427,000

Attachment 8.2 Continued

Capital Fund Program—Five-Year Action Plan

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

Part II: Supporting Pages – Physical Needs Work Statement(s)						
Work Statement for Year 1 FFY _____	Work Statement for Year 4 FFY 2012			Work Statement for Year: 5 FFY 2013		
	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost
See	OR008810001 (AMP#) OR 8-1 & 8-3 Pioneer Village I & II			OR008810001 (AMP#) OR 8-1 & 8-3 Pioneer Village I & II		
Annual	Paving, Striping & Sidewalks	3,600 sq. ft.	\$30,000	Paving, Striping & Sidewalks	10,560 sq. ft.	\$88,000
Statement	Replace Windows, Entry Doors, Exterior Siding and Paint Exterior, Phase 3	42 Bldg.	\$180,000	Replace Windows, Entry Doors, Exterior Siding and Paint Exterior, Phase 4	40 Bldg.	\$225,000
	Closet Door Replacement	80 Ea.	\$26,500	Closet Door Replacement	80 Ea.	\$26,500
	OR008860001 AMP#) OR 8-6 Kingwood West		0	OR008860001 AMP#) OR 8-6 Kingwood West		0
	OR008890001 (AMP#) OR 8-2 Arbor Court		0	OR008890001 (AMP#) OR 8-2 Arbor Court		0
	OR008890001 (AMP#) OR 8-5 LaCreole Manor			OR008890001 (AMP#) OR 8-5 LaCreole Manor		
	Asbestos Abatement	Est. 2 Units	\$5,000	Asbestos Abatement	Est. 2 Units	\$5,000
	Sealcoat Parking Lot	26,470 sq. ft.	\$9,000			
	Replace Hi-Rise Kitchen Cabinets & Appliances Phase 1	60 Units	\$126,000	Replace Hi-Rise Kitchen Cabinets & Appliances Phase 2	60 Units	\$100,000

Attachment 8.2 Continued

Capital Fund Program—Five-Year Action Plan

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

	OR008890001 (AMP#) OR 9-7 Scattered Sites			OR008890001 (AMP#) OR 9-7 Scattered Sites		0
	Replace Roofs	2 Bldg.	\$31,100			
	Paint Exteriors	9 Bldg.	\$36,900			
	Subtotal of Estimated Cost		\$444,500	Subtotal of Estimated Cost		\$444,500

Attachment 8.2 Continued

Capital Fund Program—Five-Year Action Plan

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

Part III: Supporting Pages – Management Needs Work Statement(s)				
Work Statement for Year 1 FFY _____	Work Statement for Year 2 FFY 2010		Work Statement for Year: 3 FFY 2011	
	Development Number/Name General Description of Major Work Categories	Estimated Cost	Development Number/Name General Description of Major Work Categories	Estimated Cost
See	HA Wide Management Improvement		HA Wide Management Improvement	
	Energy Conservation Audit	\$5,000	Computer Software	\$1,000
	Computer Software	\$4,000	Training	\$1,000
	Training	\$1,000		
Annual	HA Wide Administration		HA Wide Administration	
	Admin. Staff Salaries & Benefits	\$61,467	Admin. Staff Salaries & Benefits	\$61,467
	In-house Design & Specifications	\$12,000	In-house Design & Specifications	\$12,000
Statement	HA Wide Other		HA Wide Other	
	Architect/Engineering	\$30,000	Architect/Engineering	\$30,000
	Const. Insp. & Supr.	\$18,000	Const. Insp. & Supr.	\$18,000
	Advertising/Printing	\$1,500	Advertising/Printing	\$1,500
	Relocation	\$3,000	Network Server Upgrades	\$25,000
	Contingency	\$4,000	Computer Equipment	\$5,000
			Relocation	\$3,000
			Contingency	\$4,000
	HA Wide Operations	\$31,712	HA Wide Operations	\$25,712
	Subtotal of Estimated Cost	\$171,679	Subtotal of Estimated Cost	\$187,679

Attachment 8.2 Continued

Capital Fund Program—Five-Year Action Plan

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

Part III: Supporting Pages – Management Needs Work Statement(s)				
Work Statement for Year 1 FFY _____	Work Statement for Year 4 FFY 2012		Work Statement for Year: 5 FFY 2013	
	Development Number/Name General Description of Major Work Categories	Estimated Cost	Development Number/Name General Description of Major Work Categories	Estimated Cost
See	HA Wide Management Improvement		HA Wide Management Improvement	
Annual Statement	Computer Software	\$3,000	Computer Software	\$3,000
	Training	\$4,000	Training	\$4,000
	HA Wide Administration		HA Wide Administration	
	Admin. Staff Salaries & Benefits	\$61,467	Admin. Staff Salaries & Benefits	\$61,467
	In-house Design & Specifications	\$12,000	In-house Design & Specifications	\$12,000
	HA Wide Other		HA Wide Other	
	Architect/Engineering	\$30,000	Architect/Engineering	\$30,000
	Const. Insp. & Supr.	\$18,000	Const. Insp. & Supr.	\$18,000
	Advertising/Printing	\$1,500	Advertising/Printing	\$1,500
	Computer Equipment	\$5,000	Computer equipment	\$5,000
	Relocation	\$3,000	Relocation	\$3,000
	Contingency	\$5,000	Contingency	\$5,000
	HA Wide Operations	\$27,212	HA Wide Operations	\$27,212
	Subtotal of Estimated Cost	\$170,179	Subtotal of Estimated Cost	\$170,179