

# PHA Plans

## Streamlined 5-Year/Annual Version

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

OMB No. 2577-0226  
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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 that introduced 5-year and annual PHA Plans. The full PHA plan provides 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 allows eligible PHAs to make a streamlined annual Plan submission to HUD consistent with HUD's efforts to provide regulatory relief to certain PHAs. Public reporting burden for this information collection is estimated to average 11.7 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, Federal Housing Administration, 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. Information in PHA plans is publicly available.

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# Streamlined 5-Year Plan for Fiscal Years 2005 - 2009

## Streamlined Annual Plan for Fiscal Year 2005

# DRAFT

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

## Streamlined Five-Year PHA Plan Agency Identification

**PHA Name:** Housing Authority of the City of San Diego  
(San Diego Housing Commission)

**PHA Number:** CA063

**PHA Fiscal Year Beginning:** (07/2004)

**PHA Programs Administered:**

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

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

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

**Public Access to Information**

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

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

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

The PHA Plans and attachments (if any) 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 – Main Library and 33 Branch Libraries
- PHA website
- Other (list below) – Community Services

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

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

## Streamlined Five-Year PHA Plan PHA FISCAL YEARS 2005- 2009

[24 CFR Part 903.12]

### A. Mission

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

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- The PHA's mission is: (state mission here)  
The San Diego Housing Commission is committed to providing quality-housing opportunities to improve the lives of those in need.

### 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)
- 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)  
Research the feasibility of developing a Section 8 homeownership program in the City of San Diego.

**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)  
Create mixed income developments combining replacement public housing with market rate housing.

**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)

<b>Learning Opportunity Centers</b>				
<b>Program Name and Description</b>	<b>Estimated Size</b>	<b>Allocation Method</b>	<b>Access</b>	<b>Eligibility</b>
Learning Centers are located at six (6) different Public Housing sites. Services offered are: Computer skills training; GED preparation; ESL; Community College instruction; drug prevention programming; and academic tutoring.	Services are targeted to residents of 216 units. Each Learning Center has approximately 50 to 60 residents participating in services on an ongoing basis.	Residents are self-selected for participation in the services and programs at the Learning Centers.	Learning Centers are located at different Public Housing sites throughout the city.	Learning Centers are open to Public Housing residents living at the site and participants in the ROSS Bridges and ICAN programs.

**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)  
*Research "Universal Design" criteria and review proposed projects considering accepted criteria.*

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

# Streamlined Annual PHA Plan

## PHA Fiscal Year 2005

[24 CFR Part 903.12(b)]

### Table of Contents

Provide the following table of contents for the streamlined Annual Plan submitted with the Five-Year Plan, including all streamlined plan components, and additional requirements, together with the list of supporting documents available for public inspection.

#### A. ANNUAL STREAMLINED PHA PLAN COMPONENTS

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#### Attachments

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

#### B. SEPARATE HARD COPY SUBMISSIONS TO LOCAL HUD FIELD OFFICE

**Form HUD-50077, PHA Certifications of Compliance with the PHA Plans and Related Regulations: Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans; Certification by State or Local Official of PHA Plan Consistency with Consolidated Plan.**

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

**Form HUD-50070, *Certification for a Drug-Free Workplace*;**  
**Form HUD-50071, *Certification of Payments to Influence Federal Transactions*;**  
**Form SF-LLL & SF-LLLa, *Disclosure of Lobbying Activities*.**

**Executive Summary (optional)**

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

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

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

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 PHA’s Waiting Lists</b>			
Waiting list type: (select one)			
<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	33,408		1,346
Extremely low income <=30% AMI	26,959	80%	
Very low income (>30% but <=50% AMI)	5,932	18%	
Low income (>50% but <80% AMI)	517	2%	
Families with children	19,247	N/A	
Elderly families	5,244	N/A	
Families with Disabilities	10,233	N/A	
Race/ethnicity - White	9,332	28%	
Race/ethnicity - Black	8,089	24%	
Race/ethnicity- Am. Indian	322	<1%	
Race/ethnicity – Hispanic	12,229	37%	
Race/ethnicity - Asian	3,436	10%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			

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

Housing Needs of Families on the PHA's Waiting Lists			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	16,637		525
Extremely low income <=30% AMI	13,343	80%	
Very low income (>30% but <=50% AMI)	2,969	18%	
Low income (>50% but <80% AMI)	325	2%	
Families with children	10,020	N/A	
Elderly families	2,257	N/A	
Families with Disabilities	4,859	N/A	
Race/ethnicity - White	4,708	28%	
Race/ethnicity - Black	4,400	26%	
Race/ethnicity- Am. Indian	168	<1%	
Race/ethnicity – Hispanic	5,882	35%	
Race/ethnicity - Asian	1,479	8%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	4,942	29%	100
2 BR	9,218	55%	325
3 BR	1,956	11%	100
4 BR	437	2%	0
5 BR	77	<1%	0
5+ BR	7	<1%	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? <input type="checkbox"/> No <input type="checkbox"/> Yes			
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			



## B. Strategy for Addressing Needs

Provide a brief description of the PHA's strategy for addressing the housing needs of families on the PHA's public housing and Section 8 waiting lists **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

The Housing Commission's goal is to maintain a 100% lease-up and occupancy rate in order to ensure that as many families as possible are served from the waiting lists. Furthermore, the Housing Commission will do an update of families on the waiting lists to verify their current address and family status. These measures will result in expeditious processing of families as they reach the top of the wait list. We have incorporated this update into our Administrative Plan, which specifies that we will update the waiting list(s) every 12-18 months. The next update will be included in the Housing Commission's FY05 budget.

### (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)

**Seek replacement of (35) public housing units lost to San Diego City schools under eminent domain statute.**

**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)

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

**(2) Reasons for Selecting Strategies**

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

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

Other: (list below)

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

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

List on the following table 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 2004 grants)</b>		
a) Public Housing Operating Fund	\$ 2,630,123	
b) Public Housing Capital Fund	\$ 1,794,696	
c) HOPE VI Revitalization	\$ N/A	
d) HOPE VI Demolition	\$ N/A	
e) Annual Contributions for Section 8 Tenant-Based Assistance	\$ 106,979,356	
f) Resident Opportunity and Self-Sufficiency Grants	\$ 470,763	
g) Community Development Block Grant	\$ N/A	
h) HOME	\$ N/A	
<b>Other Federal Grants (list below)</b>		
	<b>Planned \$</b>	<b>Planned Uses</b>
a) Family Self-Sufficiency Program Coordinator Grant	\$ 39,112	Section 8 supportive services
b) Resident Opportunity and Self-Sufficiency Service Coordinators	\$ 60,094	Public housing supportive services
c) Development Funds	\$ 780,093	Public housing capital improvements
d) Lead Hazard Control Grant	\$ 1,830,310	Public housing safety/security
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
	<b>Planned \$</b>	<b>Planned Uses</b>
a) FY2001 Public Housing Drug Elimination Program	\$ 244,329	PH Supportive Services
b) Shelter Plus Care	\$ 733,928	Rental Assistance Disabled
c) ROSS Neighborhood Networks	\$ 99,490	PH & Section 8 Supportive Services
d) FY1999 Resident Opportunities and Self-Sufficiency Grant	\$ 26,992	PH & Section 8 Supportive Services
e) FY2000 Resident Opportunities and Self-Sufficiency Grant	\$ 321,218	PH & Section 8 Supportive Services
f) FY2001 Resident Opportunities and Self-Sufficiency Grant	\$ 201,773	PH & Section 8 Supportive Services

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
g) Capital Fund (500-00)	\$ 4,281	PH Capital Improvements, Safety/Security and Supportive Services
h) Capital Fund (501-01)	\$ 188,678	PH Capital Improvements, Safety/Security and Supportive Services
i) Capital Fund (501-02)	\$ 1,372,505	PH Capital Improvements, Safety/Security and Supportive Services
i) Family Self-Sufficiency Program Coordinator Grant	\$ 124,000	Section 8 Supportive Services
k) Moving to Work Technical Assistance	\$ 11,763	Section 8 Supportive Services
l) FFY00 Resident Opportunity and Self-Sufficiency Service Coordinators	\$ 41,513	PH & Section 8 Supportive Services
m) FFY02 Resident Opportunity and Self-Sufficiency Service Coordinators	\$ 58,217	PH & Section 8 Supportive Services
<b>3. Public Housing Dwelling Rental Income</b>	\$ 5,054,474	PH Operations, Safety/Security & Supportive Services
<b>4. Other income (list below)</b>	<b>Planned \$</b>	<b>Planned Uses</b>
a) Interest	\$ 74,790	PH Operations, Safety/Security & Supportive Services
b) Other	\$ 49,860	PH Operations, Safety/Security & Supportive Services
c) Reserves	\$ N/A	
<b>5. Non-Federal sources (list below)</b>	<b>Planned \$</b>	<b>Planned Uses</b>
a) SDCCD ICAN Welfare to Work	\$ 26,161	PH & Section 8 Supportive Services
b) SDCCD ICAN Implementation	\$ 3,196	PH & Section 8 Supportive Services
c) Family Health Centers of San Diego	\$ 25,765	PH & Section 8 Supportive Services
<b>Total resources</b>	\$ 123,247,480	

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

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

## A. Public Housing

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

### (1) Eligibility

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

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

**The eligibility for public housing is determined at the intake interview by the eligibility staff. At that time all verifications are received and considered.**

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)

**The Housing Commission also uses the following factors to determine eligibility for its programs:**

**Time and date of applications**

**Income Limits**

**Live or work in the City of San Diego**

**Veterans (*State required preference*)**

- 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)

**PHA site offices, Neighborhood Service Centers**

c. Site-Based Waiting Lists-Previous Year

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

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

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

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

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

d. Site-Based Waiting Lists – Coming Year

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

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

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

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

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

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

### **(3) Assignment**

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

- One
- Two
- Three or More

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

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

### **(4) Admissions Preferences**

a. Income targeting:

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

b. Transfer policies:

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

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

Proximity to school, work, or needed supportive services

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)

**Single persons who are 62 or older, or displaced, or homeless, or a person with disabilities. Families comprised of two or more people.**

**Veterans and veterans’ families as well as active duty military personnel and their families receive priority within the above-referenced preferences.**

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:

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- 1 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)

- 1 Single persons who are 62 or older, or displaced, or homeless, or a person with disabilities.
- 1 Families comprised of two or more people.

**Veterans and veterans' families as well as active duty military personnel and their families receive priority within the above-referenced preferences.**

4. Relationship of preferences to income targeting requirements:

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

#### **(5) Occupancy**

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

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

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

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

#### **(6) Deconcentration and Income Mixing**

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

b.  Yes  No: Do any of these covered developments have average incomes above or

below 85% to 115% of the average incomes of all such developments? If no, this section is complete. If yes, list these developments on the following table:

Deconcentration Policy for Covered Developments			
Development Name*	Number of Units	Explanation (if any) [see step 4 at §903.2(c)(1)(iv)]	Deconcentration policy (if no explanation) [see step 5 at §903.2(c)(1)(v)]
7281-7289 Saranac, 7891-7899 Golfcrest, 7526-7580 Fulton St	47	Above "EIR"	
4273-4283 Juniper St	24	Above "EIR"	Note**
2615-2665 Genesee Ave	11	Above "EIR"	
2955 Boston, 2045-2049 Grand Ave	11	Above "EIR"	
4180-4182 Poplar St	9	Below "EIR"	
4479 Altadena Ave	8	Below "EIR"	
4751 33 <sup>rd</sup> St	8	Below "EIR"	
3051 54 <sup>th</sup> St	7	Below "EIR"	
391-419 Sycamore Rd	41	Below "EIR"	
281-289 Sycamore Rd	24	Below "EIR"	
2628 44 <sup>th</sup> , 2716 44 <sup>th</sup> , 3081 Hawthorn	16	Below "EIR"	
12643-12687 El Camino Real	45	Location, no public transportation	**

\* Developments requiring de-concentration, as of October 14, 2003. A re-determination of developments requiring de-concentration will be conducted between June 23<sup>rd</sup> and June 27<sup>th</sup> 2004, and will be effective July 1, 2004 for FY05.

\*\* Please see Attachment A, for a full analysis and plan.

## 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):
- 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)

**Rental 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)

***State, New Construction, Project-Based***

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)

***Applications are available at:***

- ***Local Community-based organizations***
- ***Public Housing Sites***
- ***Website***

### **(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:

**We issue a voucher at initial term for 120 days and a 60 day extension upon request.**

### **(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)

***Families, Elderly, Disabled.***

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.

3 Date and Time

Former Federal preferences:

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

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- 2  Veterans and veterans' families
- 1  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
- 2  Other preference(s) (list below)  
*Families, Elderly, Disabled.*

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

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

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

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

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

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

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

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

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

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

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

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

[24 CFR Part 903.12(b), 903.7(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 of the following two)

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

b. Minimum Rent

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

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

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

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

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

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

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

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

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

Fixed percentage (other than general rent-setting policy)  
If yes, state percentage/s and circumstances below:

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

e. Ceiling rents

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

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

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

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

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

- Market comparability study
- Fair market rents (FMR)
- 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 - **When the family experiences a decrease**
- 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) - **Always at time of family composition change.**

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

**(2) Flat Rents**

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

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

San Diego County Apartment Association Semi-Annual Survey Report

**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 in 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. Capital Improvement Needs**

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

Exemptions from Component 5: Section 8 only PHAs are not required to complete this component and may skip to Component 6.

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

Exemptions from sub-component 5A: PHAs that will not participate in the Capital Fund Program may skip to component 5B. All other PHAs must complete 5A as instructed.

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

a.  Yes  No Does the PHA plan to participate in the Capital Fund Program in the upcoming year? If yes, complete items 12 and 13 of this template (Capital Fund Program tables). If no, skip to B.

b.  Yes  No: Does the PHA propose to use any portion of its CFP funds to repay debt incurred to finance capital improvements? If so, the PHA must identify in its annual and 5-year capital plans the development(s) where such improvements will be made and show both how the proceeds of the financing will be used and the amount of the annual payments required to service the debt. (Note that separate HUD approval is required for such financing activities.).

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

Applicability of sub-component 5B: 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.

### **(1) Hope VI Revitalization**

- a.  Yes  No: Has the PHA received a HOPE VI revitalization grant? (if no, skip to next component; if yes, provide responses to questions on chart below for each grant, copying and completing as many times as necessary)
- b. Status of HOPE VI revitalization grant (complete one set of questions for each grant)  
Development name:  
Development (project) number:  
Status of grant: (select the statement that best describes the current status)  
 Revitalization Plan under development  
 Revitalization Plan submitted, pending approval  
 Revitalization Plan approved  
 Activities pursuant to an approved Revitalization Plan underway
- c.  Yes  No: Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year? If yes, list development name/s below:
- d.  Yes  No: Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year? If yes, list developments or activities below:
- e.  Yes  No: Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement? If yes, list developments or activities below:

### **6. Demolition and Disposition**

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

Applicability of component 6: Section 8 only PHAs are not required to complete this section.

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

## FY04 ACTIVITY UPDATE

<b>Demolition/Disposition Activity Description</b>
1a. Development name: 2766 Cardinal Rd
1b. Development (project) number: CA16P063026
2. Activity type: Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/> Sale of Excess Land
3. Application status (select one) Approved <input checked="" type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application <b>approved</b> , submitted, or planned for submission: ( 10/15/2003 )
5. Number of units affected: 0
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: 10/15/2003 b. Projected end date of activity: 6/30/2004

<b>Demolition/Disposition Activity Description</b>
1a. Development name: 4118-4132 52 <sup>nd</sup> Street
1b. Development (project) number: CA16P063013
2. Activity type: Demolition <input checked="" type="checkbox"/> EMINENT DOMAIN Disposition <input 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: 7/01/04
5. Number of units affected: 14
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: 7/01/04 b. Projected end date of activity: 6/30/05

<b>Demolition/Disposition Activity Description</b>
1a. Development name: 3410-3420 43 <sup>rd</sup> Street
1b. Development (project) number: CA16P063034
2. Activity type: Demolition <input checked="" type="checkbox"/> EMINENT DOMAIN Disposition <input 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: 7/01/04
5. Number of units affected: 10

6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 7/01/04 b. Projected end date of activity: 6/30/05

<b>Demolition/Disposition Activity Description</b>
1a. Development name: 3759 Ward Road
1b. Development (project) number: CA16P063049
2. Activity type: Demolition <input checked="" type="checkbox"/> EMINENT DOMAIN Disposition <input 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: 7/01/04
5. Number of units affected: 5
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: 7/01/04 b. Projected end date of activity: 6/30/04

<b>Demolition/Disposition Activity Description</b>
1a. Development name: 3331 Van Dyke Avenue
1b. Development (project) number: CA16P063034
2. Activity type: Demolition <input checked="" type="checkbox"/> EMINENT DOMAIN Disposition <input 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: 7/01/04
5. Number of units affected: 6
6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input checked="" type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: 7/01/04 b. Projected end date of activity: 6/30/05

**7. Section 8 Tenant Based Assistance--Section 8(y) Homeownership Program**  
[24 CFR Part 903.12(b), 903.7(k)(1)(i)]

(1)  Yes  No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24

CFR part 982? (If “No”, skip to the next component; if “yes”, complete each program description below (copy and complete questions for each program identified.)

**(2) Program Description**

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? \_\_\_

b. PHA-established eligibility criteria

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

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

*Note: We are currently in the process of researching the feasibility of establishing and implementing a Section 8 Homeownership program in our area. Due to the extremely high cost of housing, it has not been possible to date. However, we are working with other jurisdictions that are operating a S8 Homeownership program in an attempt to learn from them to see how they were able to mount a viable program and to ascertain whether we can establish a program that could work in the San Diego area.*

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

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

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

**8. Civil Rights Certifications**

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

Civil rights certifications are included in the *PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations: Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans*, which is submitted to the Field

Office in hard copy—see Table of Contents.

## **9. Additional Information**

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

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

*(Provide a statement of the PHA's progress against the goals and objectives established in the previous 5-Year Plan for the period FY 2000 – 2004.*

During the last five year period (FY2000-2004) the Housing Commission achieved significant success in working towards the goals and objectives identified in the FY2000 – FY2004 5-Year Agency Plan. The following provides a snapshot of the progress during this period:

- ❑ **4,000 new households received Section 8 Vouchers.** During the last five year period 4, 000 new households were awarded Housing Choice Vouchers, increasing the number of households assisted to over 12,000. The Housing Commission's budget authority rose to approximately \$106 million.
- ❑ **Developed a successful marketing program to market Section 8 program to new owners.** The Housing Commission's Community Relations department worked together with the Section 8 department to develop a plan to encourage and identify new owners to participate in the Section 8 program. This program proved to be highly successful in attracting new owners to the program and is now considered a nationwide model for other housing agencies to follow. These efforts also resulted in improved tenant-landlord relations as new owners and residents praised the newly streamlined Section 8 program. In addition, the Housing Commission created a Rental Assistance Owner Liaison position so that owners would have a person to contact directly with their questions and/or concerns.
- ❑ **Established a direct deposit program for owners, enhancing the existing program.**
- ❑ **Developed a quarterly newsletter called "Viewpoint" targeted specifically to owners.** This newsletter is distributed quarterly to approximately 5,000 landlords who are participants in the Section 8 program. The newsletter is designed to provide owners with program information and guidelines. Each issue also contains a human-interest story that highlights how the program has affected a participant (owner or resident) in a positive way. This makes the newsletter more interesting so it doesn't just focus on rules and regulations.
- ❑ **Maintained a SEMAP score in the range of 90-100% during this period.**
- ❑ **3,000 households moved into newly acquired and rehabilitated affordable housing units or bond financed affordable units.** The Housing Commission, Housing

Development Partners, and nonprofit and for-profit developers, continue to acquire additional units, using HOME and Housing Trust Funds to secure below market-rate interest loans as well as multifamily bond financing. Multifamily bond financing was also utilized to preserve federally mortgaged projects from converting to market rate housing. These programs augment the Commission's Section 8 and public housing programs in an effort to provide additional affordable housing opportunities to San Diegans in need of housing.

- ❑ **601 Families were moved from low poverty areas of the City.** The Fair Housing Council in conjunction with the Commission moved 601 families from highly concentrated low poverty areas into other less concentrated areas of the City through its "Community Opportunities Program." The Fair Housing Council in conjunction with the San Diego Housing Commission provides access and supportive services to families to increase their fair housing opportunities within the City.
- ❑ **Provided technical assistance to 340 small businesses.** Through the Housing Commission's Equal Opportunity and Contracting department, technical assistance was provided to approximately 340 small businesses during the reporting period. This exceeded our established goal of assisting a minimum of 250 small businesses.
- ❑ **Developed a contract/contractor tracking system.** This was accomplished through the Commission's implementation of PeopleSoft software and its accompanying enhancements.

*The San Diego Housing Commission receives federal funds through the Comprehensive Grant Program and the Capital Funds Program to enhance the quality of life at our public housing units and to improve the living environment of low-income families. The following is a list of projects completed over the past five years:*

- ❑ **Performed significant exterior and interior building repairs.** During the last five years the Housing Commission performed exterior/interior building repairs at 180 units of public housing sites. The roofs were replaced at 515 units of public housing. Significant work was done to repair and repave the parking lots at 95 units.
- ❑ **Enhancement of Security.** In order to enhance security for our residents, security screen doors were installed at 254 units.
- ❑ **Fencing replacement at 46 units**
- ❑ **Improved the livability of units.** In order to improve the livability of units, air conditioners were installed in 296 units. In addition, the kitchen and bathrooms were rehabilitated at 69 units.
- ❑ **Landscaping and other exterior improvements.** The fencing was replaced at 46 units. Exterior wall light fixtures replacement at 50 units. Irrigation modernization at 42 units, as well as landscape upgrades at 242 units. The exterior of 526 units was painted and



repaired. Color Coating/Stucco replacement at 50 units. The doors at 154 units were replaced.

- ❑ **Weather related repairs.** Rain gutters were installed at 55 units.
- ❑ **Termite Removal.** Termite extermination at 87 units.
- ❑ **Site concrete replacement at 138 units.**
- ❑ **Miscellaneous improvements.** Electrical enclosures reconstructed at 50 units. In order to make our sites safe for kids to play, playground repair/replacement took place at 45 units. Stairway system removal/repair at 97 units. Replace water heaters at 32 units

*In order to promote self-sufficiency and asset development of families and individuals, the following significant activities took place during the last five-year period:*

- ❑ **An enrollment of 625 families was maintained in the Family Self-Sufficiency Program.** Outreach was conducted to 100% of Section 8 and Public Housing residents through direct mailings, newsletters, distribution of flyers). FSS orientations were held weekly at easily accessible locations throughout the City. Over 250 FSS participants have successfully completed the FSS program.
- ❑ **100% of FSS participants received access to individualized case management.** This was accomplished through linkages and referrals to supportive services such as childcare, transportation, book scholarships, assessments, job skills training and work preparation.
- ❑ **350 FSS participants attended a 2-day Career Planning Workshop.** In addition, Career assessments were conducted in-home and at Learning Opportunity Centers. Individual assessments were performed by a graduate intern using CHOICES software.
- ❑ **60% of FSS participants established escrow accounts.** The Housing Commission assisted FSS participants in setting up escrow accounts in their behalf. During the reporting period, 260 interim withdrawals from escrow accounts were granted in order to assist participants in overcoming barriers related to their career-related goals.
- ❑ **Provided on-site youth enrichment programming and academic tutoring.** On-site services were offered at Learning Opportunity Centers (LOC) at seven Public Housing sites. LOC services included ESL / ABE classes, computer instruction, youth enrichment programming and academic tutoring.
- ❑ **Provided in-home career assessments.** Job development and career assessments were conducted on an in-home basis to Public Housing families through the ROSS Bridges I

and II programs.

- ❑ **Assisted individuals through the Moving to Work Program.** 22 Public Housing families and 50 Section 8 families were served through the Moving to Work (MTW) program. An on-site Learning Opportunity Center was provided for Public Housing MTW families. LOC services included ESL / ABE classes, computer coaching, youth enrichment programming and academic tutoring. An escrow account was established for each MTW family, with an option to borrow for work-related expenses.

*The Housing Commission's public housing program accomplished the following during the FY2000 – FY2004 period:*

- ❑ **Created quarterly newsletter "Good Neighbor."** This newsletter is mailed to all residents on a quarterly basis. The newsletter, in its third year, has proven to be very popular with residents. The newsletter provides residents with updates on various capital improvement projects utilizing Capital Funds; provides safety tips; and contains a "Meet Your Neighbor" section to help residents get to know each other.
- ❑ **Provided Customer Service Training to all staff.** A formalized process was put into place to provide customer service training to all staff. As part of this process, staff worked with residents to create a resident feedback "*Comment Card*" to provide residents with another tool to voice their concerns and comments. A "*Resident Satisfaction Questionnaire*" was also created to assess problems and areas for improvement.
- ❑ **Resident Orientation Handbook.** The Resident Orientation Handbook was revised and updated in this last cycle. The handbook was developed as a tool to provide useful information to new residents moving into public housing.
- ❑ **Community Service Implemented.** The community service requirement was implemented in October 2003. The Housing Commission has contracted with *Volunteer San Diego*, a local organization to assist residents in their search for volunteer opportunities to fulfill the requirement. *Volunteer San Diego* coordinates a network of volunteers who feed the homeless, serves seniors and read to children, among other volunteer activities.
- ❑ **Improved information through electronic technology.** Public housing site information is regularly published on the Housing Commission's web page.
- ❑ **Vacancy rate reduced.** The vacancy rate in public housing was reduced from 1.60% to 1.36% (this is a 5 year average and to date).
- ❑ **Implemented mail in recertification process for Elderly and Disabled.**

In addition to the above activities, the Housing Commission also applied for and received numerous grants for its Resident Services and Family Self-Sufficiency programs.

## **B. Criteria for Substantial Deviations and Significant Amendments**

### **(1) Amendment and Deviation Definitions**

24 CFR Part 903.7(r)

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

#### a. Substantial Deviation from the 5-Year Plan:

The San Diego Housing Commission has, in conjunction with the Resident Advisory Board, developed the following definitions, as required by 24 CFR Part 903.7(r).

- **Any change to the Agency’s “Mission Statement.”**
- **Any deletion of a goal or objective that is included in the PHA Five Year Plan.**

#### b. Significant Amendment or Modification to the Five Year or Annual Plan:

- **Change to rent or admission policies;**
- **Change to the organization of the waiting list;**
- **Changes to tenant selection criteria;**
- **Addition of new activities under a component (e.g., plan to dispose of public housing units not previously included in the Annual Plan, any change in homeownership programs or conversion activities);**
- **Changes to the current Grievance or Informal Hearing Procedures;**
- **Changes to the current community service program.**

**Note: Any regulatory changes will be made to any PHA policies or procedures as a matter of ongoing administration and will not be considered to constitute a significant amendment or modification for purposes of the PHA Agency Plan.**

## **C. Other Information**

[24 CFR Part 903.13, 903.15]

### **(1) Resident Advisory Board Recommendations**

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

If yes, provide the comments below:

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

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

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

Other: (list below) – *Comments to be provided in an attachment form after public hearing in February 2004*

## (2) Resident Membership on PHA Governing Board

The governing board of each PHA is required to have at least one member who is directly assisted by the PHA, unless the PHA meets certain exemption criteria. Regulations governing the resident board member are found at 24 CFR Part 964, Subpart E.

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

Yes  No:

If yes, complete the following:

Name of Resident Member of the PHA Governing Board:

Alice Tumminia and Santiago Robles

Method of Selection:

Appointment

The term of appointment is (include the date term expires): **1/2/04 – or until a new commissioner is appointed by the Mayor of San Diego.**

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

### Description of Resident Election Process

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

Candidates were nominated by resident and assisted family organizations

Candidates could be nominated by any adult recipient of PHA assistance

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

Other: (describe)

Eligible candidates: (select one)

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

Eligible voters: (select all that apply)

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

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

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

Date of next term expiration of a governing board member:

Name and title of appointing official(s) for governing board (indicate appointing official for the next available position): *Dick Murphy, Mayor of the City of San Diego*

### **(3) PHA Statement of Consistency with the Consolidated Plan**

[24 CFR Part 903.15]

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

#### **Consolidated Plan jurisdiction: (provide name here) – City of San Diego**

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

- The PHA has based its statement of needs of families on its waiting list on the needs expressed in the Consolidated Plan/s.
- The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.

- Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
- Other: (list below)

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

The following are significant elements of the City's affordable housing strategy as described in detail in the Consolidated Plan. The Consolidated Plan supports the PHA Plan in a variety of different ways. One of the main goals of the Plan (stated below) directly supports the PHA Plan. The other described activities in the Consolidated Plan demonstrate how public, nonprofit and private partnerships are meeting Federal Statutory Goals related to the provision of affordable housing.

**GOAL [From the FY04 Consolidated Plan] - Provide rental assistance to alleviate housing cost burden, including severe cost burden, experienced by lower-income households with incomes less than eighty percent (80%) of Median Area Income (MAI):**

- To provide improved living conditions for extremely low and low-income families while maintaining their rent payments at an affordable level;
- To promote freedom of housing choice and spatial deconcentration of lower income and minority families;
- To provide decent, safe and sanitary housing for participants; and
- To provide incentives to private property owners to rent to low-income families by offering timely assistance payments.

*There are several other programs the Housing Commission operates which promote family self-sufficiency or target special purpose populations within the community.*

Family Unification: Funding provides 150 vouchers for families who have lost or will lose their children due to substandard or unavailability of housing.

Shelter Plus Care: The recipient population consists of 157 homeless individuals and families who are hardest to house as they are chronically homeless and mentally ill, substance abusers and/or are HIV/AIDS positive.

Non-Elderly Persons with Disabilities: This program serves families that have a member with a mental disability and are dually diagnosed under the age of sixty-two (62). They are case managed by nonprofit community-based organizations.

Use this section to provide any additional information requested by HUD. – N/A.

## **10. Project-Based Voucher Program**

- a.  Yes  No: Does the PHA plan to “project-base” any tenant-based Section 8 vouchers in the coming year? If yes, answer the following questions.
- b.  Yes  No: Are there circumstances indicating that the project basing of the units, rather than tenant-basing of the same amount of assistance is an appropriate option?

If yes, check which circumstances apply:

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

- c. Indicate the number of units and general location of units (e.g. eligible census tracts or smaller areas within eligible census tracts): **103** units in the following census tracts:

<b><u># OF UNITS</u></b>	<b><u>CENSUS TRACT</u></b>
23	25.02
12	51
2	91.05
25	34.01
10	39
3	21
8	68
17	27.04
3	17

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

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

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Related Plan Component</b>
X	<i>PHA Certifications of Compliance with the PHA Plans and Related Regulations and Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans.</i>	Standard 5 Year and Annual Plans; streamlined 5 Year Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan.	5 Year Plans
X	Fair Housing Documentation Supporting Fair Housing Certifications: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Related Plan Component</b>
X	Housing Needs Statement of the Consolidated Plan for the jurisdiction(s) in which the PHA is located and any additional backup data to support statement of housing needs for families on the PHA's public housing and Section 8 tenant-based waiting lists.	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O/ACOP), which includes the Tenant Selection and Assignment Plan [TSAP] and the Site-Based Waiting List Procedure.	Annual Plan: Eligibility, Selection, and Admissions Policies
N/A	Any policy governing occupancy of Police Officers and Over-Income Tenants in Public Housing. <input type="checkbox"/> Check here if included in the public housing A&O Policy.	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the method for setting public housing flat rents. <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development. <input type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies (if included in plan, not necessary as a supporting document) and written analysis of Section 8 payment standard policies. <input checked="" type="checkbox"/> Check here if included in Section 8 Administrative Plan.	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation).	Annual Plan: Operations and Maintenance
X	Results of latest Public Housing Assessment System (PHAS) Assessment (or other applicable assessment).	Annual Plan: Management and Operations
NOT REQUIRED FOR FY05	Follow-up Plan to Results of the PHAS Resident Satisfaction Survey (if necessary)	Annual Plan: Operations and Maintenance and Community Service & Self-Sufficiency
X	Results of latest Section 8 Management Assessment System (SEMAP)	Annual Plan: Management and Operations
N/A	Any policies governing any Section 8 special housing types <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Operations and Maintenance
N/A	Consortium agreement(s).	Annual Plan: Agency Identification and Operations/ Management
X	Public housing grievance procedures <input checked="" type="checkbox"/> Check here if included in the public housing A & O Policy.	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures. <input checked="" type="checkbox"/> Check here if included in Section 8 Administrative Plan.	Annual Plan: Grievance Procedures
X	The Capital Fund/Comprehensive Grant Program Annual Statement /Performance and Evaluation Report for any active grant year.	Annual Plan: Capital Needs
N/A	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grants.	Annual Plan: Capital Needs
N/A	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans, or any other approved proposal for development of public housing.	Annual Plan: Capital Needs
X	Self-evaluation, Needs Assessment and Transition Plan required by regulations implementing Section 504 of the Rehabilitation Act and the Americans with Disabilities Act. See PIH Notice 99-52 (HA).	Annual Plan: Capital Needs
X	Approved or submitted applications for demolition and/or disposition of public	Annual Plan: Demolition



<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Related Plan Component</b>
	housing.	and Disposition
N/A	Approved or submitted applications for designation of public housing (Designated Housing Plans).	Annual Plan: Designation of Public Housing
N/A	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act, Section 22 of the US Housing Act of 1937, or Section 33 of the US Housing Act of 1937.	Annual Plan: Conversion of Public Housing
N/A	Documentation for required Initial Assessment and any additional information required by HUD for Voluntary Conversion.	Annual Plan: Voluntary Conversion of Public Housing
N/A	Approved or submitted public housing homeownership programs/plans.	Annual Plan: Homeownership
N/A	Policies governing any Section 8 Homeownership program (Section _____ of the Section 8 Administrative Plan)	Annual Plan: Homeownership
X	Public Housing Community Service Policy/Programs <input checked="" type="checkbox"/> Check here if included in Public Housing A & O Policy	Annual Plan: Community Service & Self-Sufficiency
	Cooperative agreement between the PHA and the TANF agency and between the PHA and local employment and training service agencies.	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan(s) for public housing and/or Section 8.	Annual Plan: Community Service & Self-Sufficiency
X	Section 3 documentation required by 24 CFR Part 135, Subpart E for public housing.	Annual Plan: Community Service & Self-Sufficiency
	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports for public housing.	Annual Plan: Community Service & Self-Sufficiency
X	Policy on Ownership of Pets in Public Housing Family Developments (as required by regulation at 24 CFR Part 960, Subpart G). <input type="checkbox"/> Check here if included in the public housing A & O Policy.	Pet Policy
X	The results of the most recent fiscal year audit of the PHA conducted under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings.	Annual Plan: Annual Audit
N/A	Consortium agreement(s), if a consortium administers PHA programs.	Joint PHA Plan for Consortia
N/A	Consortia Joint PHA Plans ONLY: Certification that consortium agreement is in compliance with 24 CFR Part 943 pursuant to an opinion of counsel on file and available for inspection	Joint PHA Plan for Consortia
	Other supporting documents (optional). List individually.	(Specify as needed)

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

**PLEASE SEE ATTACHMENT A FOR THIS INFORMATION.**