



Mission Statement: The Portage Metropolitan Housing Authority is dedicated to meeting the housing needs of low-income families and individuals of Portage County by developing, managing and supporting decent, affordable housing in cooperation with community partners.



Portage Metropolitan Housing Authority

**2832, State Route 59,
Ravenna, Ohio 44266**

Moving To Work 2025 Annual Plan

Submitted: September 30th, 2024

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GENERAL INFORMATION



Demographics:

Portage Metropolitan Housing Authority (PMHA) is located in Portage County, Ohio, a mostly rural county in the midst of northeastern Ohio’s urban centers. It offers convenient access to the Greater Cleveland, Akron/Canton, and Warren/Youngstown metropolitan areas. It is the home of Kent State University, Hiram College, and Northeast Ohio Medical University.

Per the United States Census Bureau QuickFacts statistics, Portage County is home to 16,665 persons, of which 89.7% are White, 5.3% are Black or African American, 2.3% are Asian, 2.4% are two or more races, and 0.2% are American Indian and Alaska Native. Of this population, 2.3% are Hispanic or Latino.

According to the United States Census Bureau QuickFacts statistics as of July 1, 2023, 12.4% of Portage County persons live in poverty. The comparable past poverty rates were 13.1% based on 2019 data, 12.5% based on 2020 data, 9.9% based on 2021 data, and 12.4% based on 2022 data.

Based on Ohio Department of Job and Family Services Office of Workforce Development data for April 2024, the Unemployment Rate for Ohio was 4.2% and for Portage County, it was 4.2%.

A study conducted by the Joint Center for Housing Studies of Harvard University in 2011 ranked the Akron Metropolitan area (Summit/Portage Counties) 6th in the nation as the “least affordable”, based on the comparison of household income to the cost of living. The report cites that nearly a third of renters were paying more than half of their incomes for rent and utilities, which is significantly higher than the federally recommended maximum of 35% of income for housing costs (Ohio Department of Development, Office of Policy, Planning and Research).

The six (6) most populated municipalities in Portage County include:

<u>City</u>	<u>Population</u>
Kent City	29,761
Streetsboro City	16,224
Aurora City	15,712
Ravenna City	11,582
Brimfield Township	10,361
Ravenna Township	9,060

History:

Portage Metropolitan Housing Authority was organized in 1968 by a group of local business professionals to provide rental assistance to Ravenna residents. Over the years, the remaining portion of Portage County was added to the Housing Authority's jurisdiction. PMHA is a political subdivision created by the state of Ohio and is governed by a five-member board of commissioners.

Presently, PMHA provides subsidized housing to low and moderate-income families and individuals. The agency operates two housing programs: The Public Housing program which consists of 303 units owned and managed by the agency, and the Section 8 program which entails the administration of a monthly subsidy paid to private landlords on behalf of specific families or individuals. The Section 8 program provides rental assistance to approximately 2000 households/units in Portage County, which includes 1609 MTW households.

PMHA is the only Public Housing Authority (PHA) in Ohio that is part of the original/"initial" Moving To Work (MTW) demonstration, which consisted of 39 public housing authorities (PHAs). MTW provides PHAs the opportunity to create and test innovative, locally designed strategies that use Federal dollars more efficiently, help residents find employment and become self-sufficient, and increase housing choices for low-income families. MTW allows PHAs exemptions from many existing public housing and voucher program rules and provides funding flexibility with how they use their Federal funds.

PMHA's MTW program began on March 15, 1999. PMHA has participated in MTW since its inception. PMHA signed a Standard Agreement in 2008, extending its participation in MTW until the end of its 2018 fiscal year; however, in 2016, PMHA's participation in the demonstration was extended through year 2028.

Throughout its 56-year history, PMHA has continued to be a proven leader and innovator in affordable housing and has earned the HUD designation of "High-Performer".



Portage Metropolitan Housing Authority

Board of Commissioners:

Thomas Sicuro, Board Chairman
Jean Meadows, Board Vice-Chairman
Scott Mikula, Commissioner
John Thomas, Commissioner

Executive Director:

Pamela Nation Calhoun

PMHA Executive Leadership Team:

Amy Bower, Assistant Director
Mariah Blake, Finance Manager
Cindy Blevins, Housing Portfolio Manager
Carolyn Budd, Special Programs Manager
Lee Lovejoy, Asset Maintenance Manager
Wes Ransom, Project Manager

SECTION I: INTRODUCTION

PMHA fosters the opportunity to experiment with and implement activities which encompasses the spirit of Moving to Work and are based on the three statutory goals:

1. Reduce cost and achieve greater cost effectiveness in federal expenditures
2. Give incentives for families to work, seek work, or prepare for work and become economically self-sufficient
3. Increase housing choices for low-income families

Short-Term Goals (For Current Plan Year)

Portage Metropolitan Housing Authority established the following MTW goals and objectives for 2025:

1. Achieve and Maintain Excellence in Tenant-Based Housing Programs
 - Two households will become new homeowners through the Housing Choice Voucher Homeownership Program
2. Improve Productivity and Cost Effectiveness
 - Examine opportunities to improve productivity and cost effectiveness through technology
3. Collaborate with Community Partners to Leverage Resources to Benefit Households Assisted by PMHA and Portage County
 - PMHA will investigate opportunities to develop and manage permanent supportive housing.
 - PMHA will investigate methods of inter-agency cooperation that will lessen barriers to assistance for applicants and participants.

Long-Term Vision MTW Goals (Extending Through the Duration of the MTW Agreement)

Portage Metropolitan Housing Authority seeks to develop itself as a top-quality real estate organization with the mission of:

1. Integrating community services that will assist residents in continual economic improvement leading to either homeownership or private market housing.
2. Providing decent, safe, and affordable housing as a choice among elderly and disabled residents in order to promote aging in place and improvement in quality of life.

To accomplish the long-term vision PMHA will:

1. Streamline the delivery of housing through improvements in efficiency and effectiveness within its own resources offered by the Federal Government.
2. Collaborate with community partners to continue to leverage resources and strengths to improve housing and living conditions within Portage County.
3. Continue developing a rent system that:
 - Is easier to administer and understand,
 - Remains affordable to low-income households,
 - Provides incentive for work, and
 - Removes systemic incentives for people to remain unemployed.

SECTION II: GENERAL OPERATING INFORMATION

A. HOUSING STOCK INFORMATION

i. Planned New Public Housing Units

New public housing units that the MTW PHA anticipates will be added during the Plan Year.

ASSET MANAGEMENT PROJECT (AMP) FILL IN NAME AND NUMBER	0/1 Bdm	2 Bdm	3 Bdm	4 Bdm	5 Bdm	6+ Bdm	TOTAL UNITS	POPULATION TYPE**	Section 504 Accessible Units* (Mobility)	Section 504 Units* (Hearing / Vision)
East Side OH031000001	0	2	0	0	0	0	2	General	0	0
West Side OH031000002	0	0	0	0	0	0	0	N/A	N/A	N/A
Total Public Housing Units to be Added in the Plan Year:							2			

* The federal accessibility standard under HUD’s Section 504 regulation is the Uniform Federal Accessibility Standards (UFAS) for purposes of Section 504 compliance (24 CFR 8.32). HUD recipients may alternatively use the 2010 ADA Standards for Accessible Design under Title II of the ADA, except for certain specific identified provisions, as detailed in HUD’s Notice on “Instructions for use of alternative accessibility standard,” published in the Federal Register on May 23, 2014 (“Deeming Notice”) for purposes of Section 504 compliance, <https://www.govinfo.gov/content/pkg/FR-2014-05-23/pdf/2014-11844.pdf>

** Select “Population Type” from: General, Elderly, Disabled, Elderly/Disabled, Other

If “Population Type” is “Other” please describe:

N/A

ii. Planned Public Housing Units to be Removed

Public housing units that the MTW PHA anticipates will be removed during the Plan Year.

AMP NAME AND NUMBER	NUMBER OF UNITS TO BE REMOVED	EXPLANATION FOR REMOVAL
East Side OH031000001	0	N/A
West Side OH031000002	0	N/A
TOTAL: Public Housing Units to be Removed in the Plan Year	0	

iii. Planned New Project Based Vouchers

Tenant-based vouchers that the MTW PHA anticipates project-basing for the first time during the Plan Year. These include only those in which at least an Agreement to enter into a Housing Assistance Payment (AHAP) will be in place by the end of the Plan Year. Indicate whether the unit is included in the Rental Assistance Demonstration (RAD).

PROPERTY NAME	NUMBER OF VOUCHERS TO BE PROJECT-BASED	RAD?	DESCRIPTION OF PROJECT
None	0	N/A	N/A
TOTAL: Planned new Project Based Units in Plan Year	0		

iv. Existing Project Based Vouchers

Tenant-based vouchers that the MTW PHA is currently project-basing in the Plan Year. These include only those in which at least an AHAP is already in place at the beginning of the Plan Year. Select one of the of the following to indicate the *Planned Status by the end of the Plan Year: “Committed,” “Leased,” or “Issued.” In column three, indicate whether the unit is included in RAD.

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS	PLANNED STATUS AT END OF PLAN YEAR*	RAD?	DESCRIPTION OF PROJECT
Coleman Professional Services #1	8	Leased	No	Eight 1-BR units for disabled individuals
Coleman Professional Services #2	4	Leased	No	Four 1-BR units for disabled individuals
Family & Community Services #1	17	Leased	No	Sixteen 2-BR units & One 3-BR unit for families
Family & Community Services #2	9	Leased	No	Two 1-BR units & Seven 2-BR units for families
Family & Community Services #3	3	Leased	No	Three 2-BR units for families
Portage Housing III	1	Leased	No	One 3-BR unit for families
Prospect House	24	Leased	No	Twenty-four 1-BR units for elderly
Family & Community Services #6	2	Leased	No	Two 1-BR units for individuals
Family & Community Services #5	2	Leased	No	One 2-BR unit & One 3-BR unit for families
Family & Community Services #4	3	Leased	No	One studio unit & Two 1-BR units for individuals
Coleman Professional Services #3	5	Leased	No	Four 1-BR units & One 2-BR units for persons with disabilities
Streetsboro Family Homes	26	Leased	No	Twenty-two 3-BR units & Four 2-BR units for families
Harvest Rose Stage 1	17	Leased	No	Seventeen 2-BR units for elderly

Harvest Rose Stage 2	2	Leased	No	Two 2-BR units for elderly
Coleman Professional Services #4	8	Leased	No	Seven 1-BR units & One 3-BR unit for persons with disabilities
Coleman Professional Services #5	10	Leased	No	Ten 1-BR units for individuals with disabilities
Family & Community Services #7	4	Leased	No	Four 1-BR units for individuals with disabilities
Harvest Rose #4	2	Leased	No	Two 2-BR units for elderly
Coleman Professional Services #6	5	Leased	No	Two SRO units, Two studio units & One 1-BR units for disabled individuals
Family & Community Services PARC	23	Leased	No	Twenty-three SRO units for individuals with addiction-related disabilities
Family & Community Services Eagle	8	Leased	No	Eight 1-BR units for individuals with addiction-related disabilities
Family & Community Services #12	6	Leased	No	Six studio units for individuals with addiction-related disabilities
Family & Community Services Kentway	4	Leased	No	Four studio units for elderly
Family & Community Services Kentway II	3	Leased	No	One studio unit & Two 1-BR units for elderly
Coleman Professional Services #7	10	Leased	No	Ten 1-BR units for disabled individuals
Residential Resources for the Developmentally Challenged (Brady Lake)	7	Leased	No	Seven SRO units for individuals with disabilities
Prospect House #3	3	Leased	No	Three 1-BR units for the elderly
The Wilds at Harvest Rose	23	Leased	No	Five 1-BR units & Eighteen 2-BR units for elderly
Coleman Professional Services #8	4	Leased	No	Three 1-BR units & One 2-BR unit for disabled individuals
Family & Community Services #14	1	Leased	No	One 2-BR unit for elderly
Family & Community Services #15	4	Leased	No	Four 2-BR units for disabled families
Family & Community Services #16	4	Leased	No	Two 1-BR units & Two 2-BR unit for families
Residential Resources for the Developmentally Challenged II	4	Leased	No	Four SRO units for disabled individuals
Family & Community Services #17 – Kentway	35	Leased	No	Twenty-nine 1-BR units & Two 2-BR units for elderly
Total: Planned and Actual Existing Project-Based	291			

v. Planned Other Changes to MTW Housing Stock Anticipated During the Plan Year

Examples of the types of other changes can include (but are not limited to): units held off-line due to relocation or substantial rehabilitation, local, non-traditional units to be acquired/developed, etc.

PLANNED OTHER CHANGES TO MTW HOUSING STOCK ANTICIPATED IN THE PLAN YEAR
PMHA will utilize the proceeds from the Willow Steet Public Housing units that were previously acquired by Kent State University, supplemented by HUD-held reserves, to develop two (2) replacement Public Housing units.

vi. General Description of All Planned Capital Expenditures During the Plan Year

Narrative general description of all planned capital expenditures of MTW funds during the Plan Year.

GENERAL DESCRIPTION OF ALL PLANNED CAPITAL EXPENDITURES DURING THE PLAN YEAR
<p>East Amp1-OH031000001: PHA Wide Pavillions - \$20,000.00 Ravenna Woods Exterior Entry Doors - \$86,448.40 Community Estates Interior Doors - \$27,510.00 Community Estates Office Addition - \$40,000.00 Community Estates Splash Pad - \$15,409.60</p> <p>West Amp2-OH031000002: Athena Gardens Interior Upgrade - \$106,412.00 Scattered Site Interior/Exterior Upgrades - \$80,000.00 PHA Wide Pavillions - \$36,922.00 Heritage Knolls Roofs - \$77,348.75</p>

B. LEASING INFORMATION

i. Planned Number of Households Served

Snapshot and unit month information on the number of households the MTW PHA plans to serve at the end of the Plan Year.

PLANNED NUMBER OF HOUSEHOLDS SERVED THROUGH:	PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED*	PLANNED NUMBER OF HOUSEHOLD TO BE SERVED**
MTW Public Housing Units Leased	3636	303
MTW Housing Choice Vouchers (HCV) Utilized	19,428	1619
Local, Non-Traditional: Tenant-Based^	0	0
Local, Non-Traditional: Property-Based^	0	0
Local, Non-Traditional: Homeownership^	0	0
Planned Total Households Served:	23,064	1922

* "Planned Number of Unit Months Occupied/Leased" is the total number of months the MTW PHA plans to have leased/occupied in each category throughout the full Plan Year.

** "Planned Number of Households to be Served" is calculated by multiplying the "Planned Number of Unit Months Occupied/Leased" by the number of months in the Plan Year.

^ In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/households to be served, the MTW PHA should estimate the number of households to be served.

LOCAL, NON-TRADITIONAL CATEGORY	MTW ACTIVITY NAME/NUMBER	PLANNED NUMBER OF UNIT MONTHS OCCUPIED/LEASED*	PLANNED NUMBER OF HOUSEHOLDS TO BE SERVED*
Tenant-Based	N/A	0	0
Property-Based	N/A	0	0
Homeownership	N/A	0	0

* The sum of the figures provided should match the totals provided for each local, non-traditional categories in the previous table. Figures should be given by individual activity. Multiple entries may be made for each category if applicable.

ii. Discussion of Any Anticipated Issues/Possible Solutions Related to Leasing

Discussions of any anticipated issues and solutions in the MTW housing programs listed.

HOUSING PROGRAM	DESCRIPTION OF ANTICIPATED LEASING ISSUES AND POSSIBLE SOLUTIONS
MTW Public Housing	None
MTW Housing Choice Voucher	<p>Issue: PMHA’s MTW HCV program is currently under-leased. Impediments that affect our leasing goal are voucher holders reporting there is a lack of available units in Portage County.</p> <p>Solutions: To resolve the issue we have implemented the following:</p> <ol style="list-style-type: none"> 1. We have made arrangements for 4 billboards to be placed in Portage County for 30 days over a 12-month period. This is in addition to our already active social media presence and promoting our Landlord Referral Program, Match Events, and Orientations/Workshops. 2. As of August 30, 2023, we hired a Housing Resource Specialist. She provides housing search assistance to clients, including providing advocacy and negotiation with property owners on behalf of clients, and she works to identify new affordable housing stock through cultivating and maintaining relationships with property owners and other organizations. 3. In February 2022, PMHA implemented Landlord Incentives to encourage new landlords, as well as maintaining our current landlord pool. The Housing Resource Specialist promotes this incentive at every event, as well as at events held by other agencies within the community. 4. We have implemented landlord referrals, effective October 1, 2022, and since then, we have received 121 Landlord Referrals. The Housing Resource Specialist promotes this incentive at every event, as well as at events held by other agencies within the community. 5. As of February 1, 2024, we have board approval for security deposit assistance for our new voucher holders. Our Housing Resource Specialist will work with voucher holders where the ability to pay a security deposit impedes their leasing.
Local, Non-Traditional	N/A

C. WAITING LIST INFORMATION

i. Waiting List Information Anticipated

Snapshot information of waiting list data as anticipated at the beginning of the Plan Year. The “Description” column should detail the structure of the waiting list and the population(s) served.

WAITING LIST NAME	DESCRIPTION	NUMBER OF HOUSEHOLDS ON WAITING LIST	WAITING LIST OPEN, PARTIALLY OPEN OR CLOSED	PLANS TO OPEN THE WAITING LIST DURING THE PLAN YEAR
Section 8 MTW	Voucher waiting list for Section 8 and Mainstream programs	3649	Closed 12/31/2023	Projected to remain closed
Public Housing MTW	Waiting list for Public Housing units	3581	Open	Projected to remain open
Scattered Site Public Housing Transfer Waiting List	Current Public Housing residents who may qualify for PMHA's MTW scattered site transfer activity (Activity PH-15)	40	Open	Projected to remain open
HUD-VASH	Not a waiting list; PMHA receives referrals from the VA	N/A	N/A	N/A
Shelter Plus Care	Not a waiting list; PMHA receives referrals through CoC centralized database	N/A	N/A	N/A

Please describe any duplication of applicants across waiting lists:

Applicants may apply for the Section 8 MTW waiting list (when open) and the Public Housing MTW waiting list; therefore, they may appear on these lists simultaneously.

ii. Planned Changes to Waiting List in the Plan Year

Please describe any anticipated changes to the organizational structure or policies of the waiting list(s), including any opening or closing of a waiting list, during the Plan Year.

WAITING LIST NAME	DESCRIPTION OF PLANNED CHANGES TO WAITING LIST
N/A	No anticipated changes to the MTW waiting lists

SECTION III: PROPOSED MTW ACTIVITIES

HCV-18 Payment Standards at 120% of the FMR

A. Activity Description:

i. Describe the proposed activity.

Presently, PMHA sets its voucher payment standards based on the Fair Market Rents (FMR), which are established at least annually by the U.S. Department of Housing and Urban Development (HUD). The voucher payment standard is the maximum subsidy (payment) that PMHA can provide toward the contract rent. If the contract rent is more than the voucher payment standard, the family must make up the difference out of its own pocket, which can limit the housing options available to low-income families.

PMHA's jurisdiction has twenty-one (21) unique zip codes as listed on HUD.gov – FY2024 FMRs for Portage County, OH. An additional seven (7) zip codes are listed; however, they are not in Portage County and thus outside of PMHA's jurisdiction. PMHA identified that average rents tend to be higher than the HUD FMRs and Small Area Fair Market Rents (SAFMRs), which is an obstacle for low-income families to access high opportunity neighborhoods. It was also found that the SAFMRs for eighteen (18) out of the twenty-one (21) Portage County zip codes are lower than PMHA's 2023/2024 voucher payment standards, which will result in a negative impact for those zip codes should the SAFMRs be implemented in 2025. Utilizing SAFMRs would negatively impact 1730 out of 1855 voucher families, which is 93% of all voucher families served by PMHA.

Under this proposal, PMHA seeks to increase housing choice for voucher participants, and to mitigate the negative impacts of implementing SAFMRs. PMHA proposes to establish an alternative payment standard of 120% of the FMR, jurisdiction wide. This would increase the payment standard within eighteen (18) zip codes, thereby increasing affordability and housing choice for low-income families.

ii. Describe how the proposed activity will achieve one or more of the three statutory objectives and the specific impacts on that statutory objective(s).

The proposed activity would result in an impact on "Housing Choice", i.e., to increase housing choices for low-income families and increase resident mobility.

iii. Provide the anticipated schedules for implementing the proposed activity.

PMHA proposes to implement the initiative upon approval of the Plan.

B. Activity Metrics Information:

- i. Provide the metrics from the “Standard HUD Metrics” section that are applicable to the proposed activity.
- ii. Give the baseline performance level for each metric (a numeric value) prior to the implementation of the proposed activity.
- iii. Give the annual benchmark for each metric (a numeric value).
- iv. If applicable, give the overall and/or long-term benchmark(s) for each metric (a numeric value).

<i>HC#5: Increase in Resident Mobility</i>		
Unit of Measurement	Baseline	Benchmark
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase)	Households able to move to a better unit and/or neighborhood of opportunity prior to the implementation of this activity (number)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number)
	0	20
Improve voucher success rate	Average voucher success rate prior to implementation of activity (percentage)	Expected average voucher success rate prior to implementation of activity (percentage)
	73%	78%

- v. Give the data source from which the metric data will be compiled.
 - Management System Reports
 - Departmental Data Tracking

C. Cost Implications:

- i. State whether the proposed activity will result in any cost implications (positive and/or negative) for the MTW PHA.

The proposed activity will result in negative cost implications for PMHA. This is due to increases in payment standards in the majority of zip codes, which will increase HAP costs.

- ii. If the proposed activity does result in cost implications, provide an estimate of the amount and discuss how the MTW PHA will manage the surplus or deficit anticipated.

This activity is estimated to create a surplus of \$29,242.00, due to lessening the need for existing landlord incentives under activity HCV-16. This surplus will be put back into activity HCV-16 to support the newly-proposed incentive called “Landlord Referral Bonus”, which is described on page 25 of this Plan.

D. Need/Justification for MTW Flexibility:

- i. Cite the authorization(s) detailed in Attachment C and/or D of the Standard MTW Agreement (or applicable successor section in future iterations of the MTW Agreement) that gives the MTW PHA flexibility to conduct the proposed activity.

Attachment C, Section D(2)(a): The Agency is authorized to adopt and implement any reasonable policy to establish payment standards, rents or subsidy levels for tenant-based assistance that differ from the currently mandated program requirements in the 1937 Act and its implementing regulations.

- ii. Explain why the cited authorization(s) is needed to engage in this activity.

MTW flexibility is needed in order to waive certain provisions of Sections 8(o)(1), 8 (o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(1) of the 1937 Act and 24 CFR 982.508, 982.503 and 982.518, as necessary to implement the Agency’s Annual MTW Plan.

HCV-2 MTW Homeownership Voucher Program

Planned Significant Changes – See pages 18-20.

HCV-16 Section 8 Landlord Incentive Program

Planned Significant Changes – See pages 25-26.

B-1 Exclusions of Overtime, Bonuses, and Income from Assets

Planned Significant Changes – See pages 31-35.

SECTION IV: APPROVED MTW ACTIVITIES

A. IMPLEMENTED ACTIVITIES

HOUSING CHOICE VOUCHER PROGRAM

HCV-1 Restrict portability moves out of Portage County for the Housing Choice Voucher Program

Plan Year Approved: 2009
Implemented: 2010
Amended: N/A

Description/Update: PMHA approves portability only to housing authorities who absorb the incoming family or administer Fair Market Rents at or below the amounts applicable to Portage County. This restriction does not apply to portability moves from Portage County that are justified under laws and regulations applicable to the federal Violence Against Women Act and support reasonable accommodations for disability.

Planned Non-Significant Changes: None
Planned Changes to Metrics/Data Collection: None
Planned Significant Changes: None

HCV-2 MTW Homeownership Voucher Program

Plan Year Approved: 1999
Implemented: 2000
Amended: 2010

Description/Update: PMHA identifies families with homeownership as one of their goals, screens the family for eligibility, provides the family with referrals to organizations that assist in overcoming barriers to homeownership, and applies a homeownership assistance payment to monthly mortgage payments of participants who purchase a home under the program. PMHA provides a preference for Public Housing residents to participate in the program and, upon purchase of a home, transfer into the MTW Homeownership Voucher Program. PMHA will continue to expand this program on an ongoing basis.

In 2010, this activity was amended to include households who are presently homeowners and under foreclosure, to receive assistance with resolving issues with bank/mortgage companies seeking foreclosure and including homeownership assistance payments.

Planned Non-Significant Changes: None
Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: Yes, see below for the proposed amendment to this activity

1. Description of the proposed activity:

PMHA proposes to amend this activity to add a monetary incentive for homeownership program participants. A \$1,000 payment would be made to new homeownership program participants to assist with the cost of items needed prior to occupancy of their new home (e.g. appliances, lawncare equipment, furniture, etc.). The payment would be issued to the participant the month that the initial subsidy payment is made.

Existing homeownership program participants would be eligible to receive a one-time homeowner assistance payment in the amount of \$1,000 to help cover the replacement cost of items that are essential to the continued occupancy of their home (e.g. appliances, lawncare equipment, furniture, etc.).

2. Description of how the activity relates to at least one of the three (3) statutory objectives:

This activity increases housing choices for low-income families by helping to increase homeownership opportunities.

3. Identification and discussion of the anticipated impact of the proposed MTW activity on the stated objective:

PMHA anticipates that potential homebuyers will be less hesitant to proceed with the purchase of a home due to receiving assistance for essential items for their homes. The expected number of households that will purchase a home after implementation of this activity will increase from 2 households per year to 4 households per year.

4. Description of the baselines and benchmarks that the agency will use to measure the performance and progress of the MTW activity:

<i>HC#6: Increase in Homeownership Opportunities</i>		
Unit of Measurement	Baseline	Benchmark
Number of households that purchased a home as a result of the activity (increase)	Number of households that purchased a home prior to implementation of the activity. This number may be zero.	Expected number of households that purchased a home after implementation of the activity (number)
	0 households per year	4 households per year

<i>HC#7: Households Assisted by Services that Increase Housing Choice</i>		
Unit of Measurement	Baseline	Benchmark
Number of households receiving services aimed to increase housing choice (increase)	Households receiving a monetary incentive prior to implementation of this activity. This number may be zero.	Expected number of households receiving a monetary incentive after implementation of the activity (number)
	0 households per year	4 households per year

<i>HC#7: Households Assisted by Services that Increase Housing Choice</i>		
Unit of Measurement	Baseline	Benchmark
Number of households receiving services aimed to increase housing choice (increase)	Households receiving foreclosure prevention services prior to implementation of this activity. This number may be zero.	Expected number of households receiving foreclosure prevention services after implementation of the activity (number)
	0 households per year	1 household per year

5. Description of the data collection process and metrics the agency will use to measure how this activity will achieve one of more of the MTW statutory objectives:

The data sources from which the metric data will be compiled include management system reports and departmental data tracking. The metric tracked will be increases in homeownership opportunities.

6. The specific provision of the 1937 Act or regulation waived under MTW that authorized the agency to make this change:

Attachment C, Part D, Section 8 – Homeownership Program: The Agency is authorized to establish reasonable Section 8 homeownership programs that are not limited by the existing Section 8 homeownership requirements. This authorization waives certain provisions of Section 8(o)(15) and 8(y) of the 1937 Act and 24 CFR 982.625 through 982.643 inclusive as necessary to implement the Agency’s Annual MTW Plan.

HCV-3 Initial rent burden cap of 50% of adjusted monthly income

Plan Year Approved: 1999

Implemented: 2000

Amended: 2014, 2017

Description/Update: PMHA offers HCV participants to utilize an initial rent burden of 50% of households' monthly income as an effort to maximize housing choice and maintain a level of affordability.

In 2014, PMHA experimented with a rent burden cap of 70% of households' monthly income in an effort to assist in increasing housing choices for families who desired to use a greater share of income for housing. In 2017, due to negative impact on Section 8 tenants who had difficulties paying higher rent, PMHA re-implemented the original initial rent burden cap of 50% of households' monthly income.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

HCV-4 Project-Based Voucher Program to assist non-profits and developers to increase housing choices for low-income households

Plan Year Approved: 1999

Implemented: 2002

Amended: 2009, 2019

Description/Update: PMHA operates a project-based voucher program under a different set of rules and regulations than those provided for under the standard HUD rules for project-based vouchers.

In 2009, PMHA was granted additional authorizations for the project-based voucher program. PMHA has continued to offer project-based Section 8 assistance to nonprofit organizations and developers to build or rehabilitate properties, in order to increase the supply of rental units available to assist special needs populations in obtaining suitable housing.

In 2019, PMHA was granted additional authorizations for this activity, to allow for changes to be made to the terms of project-based Agreements to enter into Housing Assistance Payments (AHAP) contracts for newly constructed or rehabilitated housing, after the AHAPs have already been signed, contingent upon agreement by the project owner and PMHA; specifically, these changes include, but are not be limited to, changing the date(s) that units are to be brought online, and changing a single-stage project to a multi-stage project, to allow for units that are ready to come online ahead of schedule to be put under HAP contract and filled as soon as the units are completed and determined eligible.

Planned Non-Significant Changes: None
Planned Changes to Metrics/Data Collection: None
Planned Significant Changes: None

HCV-5 Alternative Housing Quality Standards Compliance

Plan Year Approved: 2011
Implemented: 2011
Amended: N/A

Closed Out: 2014 - Refer to Section D. Closed Out Activities.

HCV-6 Time Limits for Housing Choice Voucher Participants

Plan Year Approved: 2013
Implemented: 2014
Amended: N/A

Closed Out: 2017 - Refer to Section D. Closed Out Activities.

HCV-7 Capped Utility Reimbursement Checks

Plan Year Approved: 2012
Implemented: N/A
Amended: N/A

Closed Out: 2017 - Refer to D. Closed-Out Activities.

HCV-8 Transitional Housing Vouchers

Plan Year Approved: 2012
Implemented: 2012
Amended: N/A

Closed Out: 2017 - Refer to D. Closed-Out Activities.

HCV-9 Elimination of Deductions in Total Tenant Payment Calculations

Plan Year Approved: 2014
Implemented: 2015
Amended: N/A

Description/Update: PMHA calculates total tenant payments and bases Housing Choice Voucher assistance for all households on a calculation that is 29.6% of gross monthly income and eliminates deductions and allowances for being elderly or disabled, for dependents, and for unreimbursed medical and childcare expenses. The only exception to the 30% of monthly gross income is a continuation of a \$50 minimum rent for households who otherwise pay less than \$50 per month. This activity reduces the HAP expense.

Planned Non-Significant Changes: None
Planned Changes to Metrics/Data Collection: None
Planned Significant Changes: None

HCV-10 Biennial Reviews for Non-Elderly/Non-Disabled Households

Plan Year Approved: 2014
Implemented: 2014
Amended: 2015-2016

Refer to C. Activities on Hold.

HCV-11 Permit Households at \$0 HAP to Self-Certify Income

Plan Year Approved: 2014
Implemented: 2014
Amended: N/A

Closed Out: 2022 - Refer to Section D. Closed Out Activities.

HCV-12 Use Lesser of Actual Unit Size or Unit Size of Voucher Issued for Utility Allowances

Plan Year Approved: 2014
Implemented: N/A
Amended: N/A

Closed Out: 2014 - Refer to Section D. Closed Out Activities.

HCV-13 Extend the \$0 HAP Period to 12 Months

Plan Year Approved: 2014
Implemented: 2014
Amended: N/A

Description/Update: PMHA extends the period of time that a \$0 HAP family may be considered a Housing Choice Voucher participant household from 6 months to up to 12 months.

The impact of this activity asserts that some families either are reluctant to attain \$0 HAP status or when notified that they are at \$0 HAP, they take measures that reduce their income so as to begin receiving HAP assistance again. By increasing the period allowed for \$0 HAP, PMHA expects to see more families achieve \$0 HAP and to exit the program at \$0 HAP rather than to return to HAP payment status. For those who achieve \$0 HAP status through employment, the extended period allows a safety net to the household as they adjust to paying market rents without assistance and stabilize themselves in their new employment situation.

Planned Non-Significant Changes: None
Planned Changes to Metrics/Data Collection: None
Planned Significant Changes: None

HCV-14 Permit Decreases in Payment Standards at Next Scheduled Verification

Plan Year Approved: 2014
Implemented: N/A

Refer to B. Not Yet Implemented Activities.

HCV-15 Change the Allocation of Interest Earned for the Housing Choice Voucher Family Self-Sufficiency Program

Plan Year Approved: 2014
Implemented: 2015
Amended: N/A

Description/Update: PMHA no longer applies escrow credits for interest earned on funds deposited for the Housing Choice Voucher Family Self-Sufficiency Program. These funds will be made available for ongoing HAP needs for the Housing Choice Voucher Program as a whole. PMHA expects that the impact of this activity will provide minimal additional revenue to the Housing Choice Voucher funds. Minimal staff time savings will also result.

Planned Non-Significant Changes: None
Planned Changes to Metrics/Data Collection: None
Planned Significant Changes: None

HCV-16 Section 8 Landlord Incentive Program

Plan Year Approved: 2019

Implemented: 2019

Amended: 2022

Description/Update: In 2019, this activity was proposed as “Incentive for New Landlords”. PMHA provided new landlords a one-time additional incentive Housing Assistance Payment (HAP) of \$200.00 upon the execution of a HAP contract for a tenant-based HCV participant. A new landlord was defined as a landlord who has not rented to a voucher holder within the past two (2) years. It was found that this incentive was not adequate and thus the activity underperformed.

This activity was amended and repropose in 2022. PMHA currently offers the following four (4) incentives:

1. **New Landlords Incentive-** PMHA offers a one-time incentive HAP payment of \$1,000.00 to new landlords, upon the execution of a new HAP contract for an MTW tenant-based HCV participant. A “new landlord” would be defined as a landlord who has not rented to a tenant-based voucher participant within the past twelve (12) months. The landlord would not be eligible for the \$1,000.00 incentive HAP payment if the contract is executed for a transfer of units with the same landlord, or if the contract is executed due to a lease renewal or change. Additionally, properties owned or managed by PMHA or any other PHA would be ineligible for this incentive.
2. **Existing Landlords Incentive-** PMHA proposes to offer a one-time \$500.00 incentive HAP payment to existing landlords who execute a new HAP contract for an MTW tenant-based HCV participant. An “existing landlord” would be defined as a landlord who has rented to a tenant-based voucher participant at any time within the past twelve (12) months. The landlord would not be eligible for the \$500.00 incentive HAP payment if the contract is executed for a transfer of units with the same landlord, or if the contract is executed due to a lease renewal or change. Additionally, properties owned or managed by PMHA or any other PHA would be ineligible for this incentive HAP payment.
3. **Rent Affordability Incentive-** PMHA proposes to offer a one-time rent affordability payment when rent must be negotiated down in order for the unit to be affordable for the MTW tenant-based voucher participant. “Affordable” would be defined as an initial rent burden of no more than 50% of the household’s monthly income. The rent affordability payment would be equal to the amount the proposed monthly rent is reduced by to make it affordable and allow the voucher holder to qualify, multiplied by 12.

- Limited Damage Claim Incentive-** PMHA proposes to offer a limited damage claim not to exceed one month's contract rent to owner in cases where an MTW tenant-based voucher participant's tenancy ends and there is tenant-caused damage to the unit that exceeds the security deposit collected by the owner. The damage claim would be verified by a special inspection conducted by a PMHA HQS inspector. The special inspection will be required to be conducted within 30 calendar days of the MTW tenant-based HCV participant's move-out date.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: Yes, see below for the proposed amendment to this activity

1. Description of the proposed activity:

PMHA proposes to amend this activity to add a monetary incentive called "Landlord Referral Bonus". A \$500 incentive payment would be made to current active landlords who refer a new landlord who has not participated in the Section 8 Housing Choice Voucher program within the past 12 months. The referred landlord must participate in the program, leasing to a PMHA Housing Choice Voucher program participating tenant/family, for a running six-month period from the date of the referral. The bonus cannot exceed \$1,000 per landlord in a calendar year.

2. Description of how the activity relates to at least one of the three (3) statutory objectives:

This activity increases housing choices for low-income families by increasing the landlord pool and thereby increasing availability of rental unit options.

3. Identification and discussion of the anticipated impact of the proposed MTW activity on the stated objective:

PMHA anticipates that resident mobility will increase, allowing households to move to better units and/or neighborhoods, and voucher success rate will increase due to more available rental unit opportunities that accept the voucher in Portage County.

4. Description of the baselines and benchmarks that the agency will use to measure the performance and progress of the MTW activity:

HC#5: Increase in Resident Mobility		
Unit of Measurement	Baseline	Benchmark
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase)	Households able to move to a better unit and/or neighborhood of opportunity prior to the implementation of this activity (number)	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number)
	15	50
Improve voucher success rate	Average voucher success rate prior to implementation of activity (percentage)	Expected average voucher success rate prior to implementation of activity (percentage)
	68%	78%

5. Description of the data collection process and metrics the agency will use to measure how this activity will achieve one of more of the MTW statutory objectives:

The data sources from which the metric data will be compiled include financial reports, management system reports and departmental data tracking. The metric tracked will be increases in homeownership opportunities.

6. The specific provision of the 1937 Act or regulation waived under MTW that authorized the agency to make this change:

Attachment C, Part D, Section 1(d): The Agency is authorized to determine damage claims and/or vacancy loss policy and payments for occupied units. Damage and vacancy authority are subject to state and local laws. This authorization waives certain provisions of Section 8(o)(9), of the 1937 Act and 24 CFR 982.311 as necessary to implement the Agency’s Annual MTW Plan.

HCV-17 Protecting Tenants Living in Foreclosed Rental Properties

Plan Year Approved: 2020
 Implemented: N/A

Refer to B. Not Yet Implemented Activities.

PUBLIC HOUSING PROGRAM

PH-1 Escalating Minimum Rent

Plan Year Approved: 2008
Implemented: 2008
Amended: N/A

Closed Out: 2011 - Refer to D. Closed-Out Activities.

PH-2 Maximum Rent

Plan Year Approved: 2009
Implemented: 2009
Amended: 2024

Description/Update: The Maximum Rent activity allows for rents set at less than 30% of adjusted income. For several years, the maximum rents were set at \$465 per month for 1- and 2-bedroom units, and \$490 per month for 3- and 4-bedroom units, regardless of income.

This activity was amended and repropose in 2024. The maximum rent amounts were adjusted to be more comparable to market rents in the area. The new maximum rents were set at \$612 per month for 1-bedroom units, \$779 per month for 2-bedroom units, \$976 per month for 3-bedroom units, and \$1042 per month for 4-bedroom units, regardless of income. The amended maximum rent amounts were implemented on the date of any move-in or unit transfer that occurred on or after March 1, 2024 and at each existing tenant's annual recertification that occurred on or after May 1, 2024.

Households have no time limit for maximum "ceiling" rents, except for the over-income limitations set forth by the Housing Opportunity Through Modernization Act of 2016 (HOTMA).

Planned Non-Significant Changes: None
Planned Changes to Metrics/Data Collection: None
Planned Significant Changes: None

PH-3 Elderly and Disabled Rent Re-certifications Biennially

Plan Year Approved: 2000
Implemented: 2000
Amended: N/A

Closed Out: 2014 - Refer to D. Closed-Out Activities.

PH-4 Change in Employment Income

Plan Year Approved: 2008
Implemented: 2012
Amended: N/A

Closed Out: 2025 - Refer to D. Closed-Out Activities.

PH-5 Rent Adjustment for Income Decreases

Plan Year Approved: 2009
Implemented: 2009
Amended: N/A

Closed Out: 2025 - Refer to D. Closed-Out Activities.

PH-6 Overall Percentage of Income Amounts for Rent Calculations

Plan Year Approved: 2012
Implemented: 2012
Amended: N/A

Closed Out: 2018 - Refer to D. Closed-Out Activities.

**PH-7 Eliminate Allowance for Non-Reimbursed Childcare Expenses
Comment and Replace with 4% Overall percentage of earned income**

Plan Year Approved: 2012
Implemented: April 1, 2012
Amended: N/A

Closed Out: 2018 - Refer to D. Closed-Out Activities.

PH-8 Deduction for Elderly or Disabled Adults

Plan Year Approved: 2009
Implemented: N/A
Amended: N/A

Closed Out: 2014 - Refer to D. Closed-Out Activities.

PH-9 Providing Transitional Housing

Plan Year Approved: 1999

Implemented: 1999

Amended: N/A

Closed Out: 2012 - Refer to D. Closed Out Activities.

PH-10 PMHA to Operate Two Group Homes as Public Housing

Plan Year Approved: 2009

Implemented: 2009

Amended: N/A

Description/Update: PMHA currently operates two (2) group homes as Public Housing, as follows:

1. **Walnut House**, located in Ravenna, houses persons with severe mental illnesses, in partnership with Coleman Professional Services. Coleman Professional Services provides on-site services to residents, including mental health services, daily living skills, and transportation. This property has 13 units of housing.
2. **Washington Group Home**, located in Ravenna Township, has a capacity for 8 individuals to reside in a supportive group home environment. PMHA entered into a partnership with Family and Community Services, Inc. (F&CS) to lease the building for the purposes of providing housing and services to men who are addressing alcohol and drug addiction issues. F&CS provides residents with comprehensive services to facilitate a successful transition back to community living. This project was finalized during the first half of 2013. The program has flourished and is well-received in the community.

Residents are not entered into PIC due to the nature of the specific population served. F&CS screens and selects eligible candidates for this program, known as ROOT. Thus, Standard HUD Metrics do not apply.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

PH-11 Deduction for Absent Child

Plan Year Approved: 2009
Implemented: N/A
Amended: N/A

Closed Out: 2013 - Refer to D. Closed out Activities.

PH-12 Cap on Dependent Child Deduction

Plan Year Approved: 1999
Implemented: 2000
Amended: 2014

Closed Out: 2018 - Refer to D. Closed-Out Activities.

PH-13 Residents paying ceiling rents may self-certify income

Plan Year Approved: 2015
Implemented: 2016
Amended: N/A

Closed Out: 2022 - Refer to D. Closed-Out Activities.

PH-14 Elimination of Deductions in Total Tenant Payment Calculations

Plan Year Approved: 2018
Implemented: 2018
Amended: N/A

Description/Update: PMHA calculates total tenant payments and bases Public Housing assistance for all households on a calculation that is 29.6% of gross monthly income and eliminates deductions and allowances for being elderly or disabled, for dependents, and for unreimbursed medical and childcare expenses. The only exception to the 30% of monthly gross income is a continuation of a \$50 minimum rent for households who otherwise pay less than \$50 per month.

Planned Non-Significant Changes: None
Planned Changes to Metrics/Data Collection: None
Planned Significant Changes: None

PH-15 **Scattered Site Transfers**

Plan Year Approved: 2020

Implemented: 2020

Amended: N/A

Description/Update: PMHA fills vacancies in Public Housing scattered single family and/or duplex sites by offering unit transfers to select current Public Housing families based on their household size and positive rental histories with PMHA. This activity ensures that families with positive rental histories with PMHA are given first choice to move into vacated scattered site units, which is expected to save on PMHA's costs for staff time and expenses incurred to turn over units between tenancies.

PMHA maintains a formal waiting list of Public Housing residents who are eligible for the bedroom size of the unit available and who meet the following rental history criteria:

- Have been Public Housing residents for at least 12 months,
- Have zero housekeeping violations in the last 12 months,
- Have zero substantiated neighbor complaints in the last 24 months, and
- Have a timely rent payment history for the last 12 months (no 3-day notices issued for late payment and/or non-payment of rent).

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

BOTH HOUSING CHOICE VOUCHER AND PUBLIC HOUSING PROGRAMS

B-1 Exclusions of Overtime, Bonuses, and Income from Assets

Plan Year Approved: 1999

Implemented: 2000

Amended: 2012

Description/Update: To promote the accumulation of assets, PMHA excludes income from new employment income, overtime, bonuses, and interest from bank assets such as checking and savings accounts and certificates of deposit.

This activity was modified in 2012 for the Public Housing program to exclude income from “new” employment until annual re-certification for reporting purposes.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: Yes, see below for the proposed amendment to this activity

1. Description of the proposed activity:

To further promote the accumulation of assets, PMHA proposes to amend this activity to exclude income from all types of assets, whether they be actual or imputed. While PMHA already excludes income from bank assets, this proposed amendment would exclude income from all asset types. PMHA will, however, implement the HOTMA Asset Limitations rule at admissions to determine eligibility.

2. Description of how the activity relates to at least one of the three (3) statutory objectives:

This activity promotes self-sufficiency by promoting asset accumulation. This activity also reduces costs and will achieve greater cost effectiveness for the agency due to staff time savings.

3. Identification and discussion of the anticipated impact of the proposed MTW activity on the stated objective:

PMHA anticipates that households’ assets will increase, providing an opportunity for self-sufficiency. PMHA also anticipates that this activity will save staff time and therefore reduce agency costs.

4. Description of the baselines and benchmarks that the agency will use to measure the performance and progress of the MTW activity:

Public Housing Program

<i>SS#2: Increase in Household Savings</i>		
Unit of Measurement	Baseline	Benchmark
Average amount of savings of households affected by this policy in dollars (increase) From Wage Exclusions	Average savings amount of households affected by this policy prior to implementation of the activity (in dollars) From Wage Exclusions	Expected average savings amount of households affected by this policy prior to implementation of the activity (in dollars) From Wage Exclusions
	\$5,000	\$5,000
Average amount of savings of households affected by this policy in dollars (increase) From Asset Income	Average savings amount of households affected by this policy prior to implementation of the activity (in dollars) From Asset Income	Expected average savings amount of households affected by this policy prior to implementation of the activity (in dollars) From Asset Income
	\$500	\$1,300

CE#1: Agency Savings		
Unit of Measurement	Baseline	Benchmark
Total cost of task in dollars (decrease) From Wage Exclusions	Cost of task prior to implementation of the activity (in dollars) From Wage Exclusions	Expected cost of task prior to implementation of the activity (in dollars) From Wage Exclusions
	\$69 per resident 35 residents x 3 hours x \$22.88 (hourly rate)= \$2,402	\$46 per resident 35 residents x 2 hours x \$22.88 (current hourly rate)= \$1,602
Total cost of task in dollars (decrease) From Asset Income	Cost of task prior to implementation of the activity (in dollars) From Asset Income	Expected cost of task prior to implementation of the activity (in dollars) From Asset Income
	\$69 per resident 152 residents x 3 hours x \$22.88 (hourly rate)= \$10,433	\$46 per resident 152 residents x 2 hours x \$22.88 (current hourly rate)= \$6,956

Housing Choice Voucher Program

SS#2: Increase in Household Savings		
Unit of Measurement	Baseline	Benchmark
Average amount of savings of households affected by this policy in dollars (increase) From Asset Income	Average savings amount of households affected by this policy prior to implementation of the activity (in dollars) From Asset Income	Expected average savings amount of households affected by this policy prior to implementation of the activity (in dollars) From Asset Income
	\$200	\$1,200

CE#1: Agency Cost Savings		
Unit of Measurement	Baseline	Benchmark
Total cost of task in dollars (decrease) From Asset Income	Cost of task prior to implementation of the activity (in dollars) From Asset Income	Expected cost of task prior to implementation of the activity (in dollars) From Asset Income
	\$65 per resident 788 residents x 3 hours x \$21.56 (hourly rate)= \$50,968	\$43 per resident 788 residents x 2 hours x \$21.56 (current hourly rate)= \$33,979

5. Description of the data collection process and metrics the agency will use to measure how this activity will achieve one of more of the MTW statutory objectives:

The data sources from which the metric data will be compiled include financial reports, management system reports and departmental data tracking. The metric tracked will be increases in homeownership opportunities.

6. The specific provision of the 1937 Act or regulation waived under MTW that authorized the agency to make this change:

Attachment C, Part C, Section 11: The Agency is authorized to determine family payment, including total tenant payment, the minimum rent, utility reimbursement and tenant rent. The Agency is authorized to adopt and implement any reasonable policies for setting rents in public housing, including but not limited to establishing definitions of income or adjusted income, or earned income disallowance that differ from those in current statutes or regulations. This authorization waives certain provisions of Section 3(a)(2), 3(a)(3)(A) and Section 6(1) of the 1937 Act and 24 CFR 5.603, 5.611, 5.628, 5.630, 5.632, 5.634 and 960.255 and 966 Subpart A as necessary to implement the Agency's Annual MTW Plan.

Attachment C, Part D, Section 2(a): The Agency is authorized to adopt and implement any reasonable policy to payment standards, rents or subsidy levels for tenant-based assistance that differ from the current mandated program requirements in the 1937 Act and its implementing regulations. The Agency is authorized to adopt and implement any reasonable policies to calculate the tenant rent that differ from the currently mandated program requirements of the 1937 Act and its implementing regulations. This authorization waives certain provisions of Section 8(o)(1), 8(o)(2), 8(o)(3), 8(o)(10) and 8(o)(13)(H)-(I) of the 1937 Act and 24 CFR 982.508, 982.503 and 982.518 as necessary to implement the Agency's Annual MTW Plan.

B-2 Cap on dependent child deduction

Plan Year Approved: 1999
Implemented: 2000
Amended: N/A

Closed Out: 2014 (for HCV), 2018 (Public Housing) - Refer to D. Closed-Out Activities.

B-3 Utility Allowance Payments are used to repay participant debts owed to the Housing Authority

Plan Year Approved: 2009
Implemented: 2010
Amended: N/A

Description/Update: PMHA withholds utility allowance checks for households who owe PMHA money to be used to repay those debts. Once the tenant account is returned to zero balance, the utility allowance checks will resume.

Planned Non-Significant Changes: None
Planned Changes to Metrics/Data Collection: None
Planned Significant Changes: None

B-4 Pro-ration of the utility allowance schedule up to the percentage of pro-ration of funding as established by HUD due to appropriations

Plan Year Approved: 2009

Implemented: 2014 (Public Housing Program only); Refer to Section B. Not Yet Implemented Activities for HCV Program.

Amended: N/A

Description/Update: To offer an additional tool to deal with reductions in HUD subsidy for Public Housing or Housing Choice Vouchers, PMHA has authority to reduce utility allowance payments to address funding shortfalls. This feature was not utilized from 2017 through 2024, but it will be reviewed for possible Public Housing utilization and HCV implementation in the future.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

B-5 Single Fund Budget Flexibility

Plan Year Approved: 2009

Implemented: 2013

Amended: N/A

Closed Out: 2014 - Refer to D. Closed out Activities.

B-6 Income verifications conducted for approved government programs may be substituted for PMHA income verifications if performed within the previous 90 days

Plan Year Approved: 2009

Implemented: N/A

Amended: N/A

Closed Out: 2014 - Refer to D. Closed out Activities.

B-7 Employment and education deductions

Plan Year Approved: 1999

Implemented: 2000

Amended: N/A

Closed Out: 2012 (Public Housing), 2015 (HCV) - Refer to D. Closed-Out Activities.

B-8 Adoption of Local Investment Policies

Plan Year Approved: 2014

Implemented: N/A

Refer to B. Not Yet Implemented Activities.

B-9 Verifications of Income Valid for 180 Days

Plan Year Approved: 2014

Implemented: 2014

Amended: N/A

Description/Update: PMHA extends the length of time for verified application data to be considered valid to 180 days. This activity reduces costs and achieves greater cost effectiveness in Federal expenditures. It also reduces the amount of duplicative work caused by various factors in validating all needed information provided at the time of a completed application and process from the wait list.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

B-10 Eliminate All Excluded Income from the Income Verification Process

Plan Year Approved: 2014

Implemented: 2014

Amended: N/A

Refer to C. Activities on Hold.

B-11 Elderly and Disabled Rent Re-certifications Every Three Years

Plan Year Approved: 2014

Implemented: 2014

Amended: N/A

Refer to C. Activities on Hold.

B-12 Re-Entry Initiative

Plan Year Approved: 2020

Implemented: 2021

Amended: N/A

Description/Update: This activity provides housing assistance to up to 150 eligible participants who were incarcerated, involved in drug court and/or court-ordered diversion programs, and/or released from in-patient treatment within the past twelve (12) months, and are seeking affordable housing upon re-entry into the community. The goal of this activity is to provide an immediate impact for offenders coming out of prison and/or treatment facilities, who need housing and supportive services, and who would otherwise be left homeless and without services needed for successful reintegration into the community.

All eligible participants must be referred to PMHA by its re-entry program partner, Portage County Adult Probation, and are either reuniting with a qualifying family member currently participating in PMHA's Section 8 program or Public Housing Program, or referred to PMHA for a Section 8 MTW tenant-based voucher under the re-entry program, or referred to PMHA for an emergency short-term stay of approximately 30 days at a dedicated PMHA-owned non-Public Housing unit (or a PMHA-owned Public Housing unit, should this be more feasible) while seeking permanent housing through the program's Section 8 MTW tenant-based voucher option, or an applicant on the PMHA Section 8 waiting list who otherwise would be denied for criminal activity, but who is currently involved with Portage County Adult Probation, meets all eligibility requirements for the program when he/she is selected for processing (in the existing waiting list order), and is recommended for participation in the program by Portage County Adult Probation.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

B-13 Self-Certification as Highest Form of Income Verification

Plan Year Approved: 2021

Implemented: 2022

Amended: 2021

Description/Update: PMHA was approved to waive the requirement to use the HUD system of income verification hierarchy when verifying certain types of income and instead to consider self-certification as the highest form of income verification for annual and interim reexaminations in both the HCV and Public Housing programs. The specific types of income were employment income, child support for which no court order exists, in-kind income, miscellaneous income (i.e., handyperson jobs, mowing, babysitting, cleaning, and other similar odd jobs), TANF benefits (given that the amount self-certified

is consistent with the amount specified by the State for the household size), zero income status, and asset balance. The self-certification was obtained verbally or in written format from the program participant, and PMHA staff used the self-certification, cross-checked with the EIV income report, to determine the dollar amount of a participant's income for rent calculation purposes.

In March 2021, PMHA proposed and was approved to amend this activity to waive the requirement to use the HUD system of income verification hierarchy described by Notice PIH 2018-18 when verifying *all* types of income and allow PMHA to forgo third-party income verification requirements, except for the use of EIV. PMHA proposed to allow self-certification to serve as the highest form of income verification for *all* types of income, to process new admissions and to process annual and interim reexaminations in both the HCV and Public Housing programs. This occurs over the telephone and is documented by PHA staff with a contemporaneous written record, through an email or postal mail with a self-certification form by the tenant, or through other electronic communications. PMHA is responsible for addressing any material discrepancies (i.e., unreported income or a substantial difference in reported income) that arise from review of EIV in connection with the recertification, as well as any material discrepancies that arise later from any source, and likewise PMHA takes enforcement action in accordance with our policies and procedures.

Planned Non-Significant Changes: None
Planned Changes to Metrics/Data Collection: None
Planned Significant Changes: None

B-14 Change in Social Security and Supplemental Security Income (SSI) Processing

Plan Year Approved: 2021
Implemented: 2021
Amended: N/A

Description/Update: Annual Social Security and SSI Cost-of-Living Adjustments (COLA) that result in an increase in a program participant's income are not processed until the household's next annual reexamination effective date. Program participants are not required to report the COLA income to PMHA until either the household's next annual reexamination or any other event that triggers an interim recertification, whichever occurs first. This activity is not used for HCV and Public Housing program applicants who are processing for initial eligibility, or for other circumstances where eligibility for a new HCV voucher is required (i.e., unit changes).

The increased income will not be counted until the next annual reexamination unless the household experiences an income *decrease*, which triggers the processing of an interim recertification. As part of the interim recertification calculation, the full amount of Social Security or SSI, including the COLA, will be counted at that time as replacement income.

This activity is not used for HCV and Public Housing program applicants who are processing for initial eligibility, or for other circumstances where eligibility for a new HCV voucher is required (i.e., unit changes).

Planned Non-Significant Changes: None
Planned Changes to Metrics/Data Collection: None
Planned Significant Changes: None

B-15 Change in Temporary Assistance for Needy Families (TANF) Cost-of-Living Adjustment (COLA) Processing

Plan Year Approved: 2023
Implemented: 2023
Amended: N/A

Description/Update: Cost-of-Living Adjustments (COLA) to Temporary Assistance for Needy Families (TANF) income, including Ohio Works First (OWF) and Refugee Cash Assistance, which result in an increase in a program participant's household income, are not processed until the household's next annual reexamination effective date. Program participants are not required to report the COLA income to PMHA until either the household's next annual reexamination or any other event that triggers an interim recertification, whichever occurs first.

The increased income will not be counted until the next annual reexamination unless the household experiences an income *decrease*, which triggers the processing of an interim recertification. As part of the interim recertification calculation, the full amount of TANF, including the COLA, will be counted at that time as replacement income.

This activity is not used for HCV and Public Housing program applicants who are processing for initial eligibility, or for other circumstances where eligibility for a new HCV voucher is required (i.e., unit changes).

Planned Non-Significant Changes: None
Planned Changes to Metrics/Data Collection: None
Planned Significant Changes: None

B. NOT YET IMPLEMENTED ACTIVITIES

HCV-14 Permit Decreases in Payment Standards at Next Scheduled Verification

Plan Year: 2014

Description/Update: This activity allows PMHA to change the implementation of new payment standards established by the housing authority to be effective at the date of the anniversary of household assistance (formerly known as the annual recertification), rather than be implemented at the second annual recertification following the change. Under present regulations, housing authorities may not lower payment standards until the 2nd annual recertification after the lowering of the payment standards, which hampers a PHA from taking action to lower HAP costs quickly and more fairly across all participant households. In 2013, PMHA raised minimum rents from \$25 to \$50 as part of its response to the federal sequester and the need to reduce HAP costs. This increased the rent burden on the lowest income participants and for less results on HAP than if PMHA were permitted to reduce payment standards slightly, across the board for all participants. This activity would allow PMHA to be able to adjust HAP spending quickly and in a more equitable manner (compared to raising minimum rents or adjusting rent calculations) that can spread the cost of budget cuts across a greater portion of the HCV recipient population more quickly.

This activity will be reviewed for possible implementation in the future.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

HCV-17 Protecting Tenants Living in Foreclosed Rental Properties

Plan Year Approved: 2020

Description/Update: This activity protects renters who are living in foreclosed rental properties. PMHA provides tenant-based vouchers and rental assistance to those who were living in rental properties that have gone through foreclosure and are currently owned by the Portage County Land Bank. This activity is expected to preserve housing units for households who would otherwise be displaced or their rental units not available to them due to the housing costs. The program size will not exceed twenty-four (24) eligible participants in eligible units.

This activity will be reviewed for possible implementation in the future.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

B-4 Pro-ration of the utility allowance schedule up to the percentage of pro-ration of funding as established by HUD due to appropriations

Plan Year: 2009

Description/Update: To offer an additional tool to deal with reductions in HUD subsidy for Public Housing or Housing Choice Vouchers, PMHA has authority to reduce utility allowance payments to address funding shortfalls. This activity was implemented in 2014 for the Public Housing Program. Although this feature was not utilized in 2017 through 2022, it will be reviewed for possible Public Housing utilization in the future.

For the HCV Program, this activity was not implemented, and it will be reviewed for possible implementation in the future.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

B-8 Adoption of Local Investment Policies

Plan Year: 2014

Description/Update: PMHA seeks to evaluate and utilize State of Ohio investment alternatives when appropriate for earning greater returns without compromising asset safety. This activity will allow PMHA to invest in a state government program for state and local governments in Ohio that permits pooled collateralized investment that obtains higher interest rates than is typically available to PMHA on its own while remaining completely liquid as an asset.

PMHA has not implemented new local investment policies; however, this activity will be reviewed for possible implementation in the future.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

C. ACTIVITIES ON HOLD

HCV-10 Biennial Reviews for Non-Elderly/Non-Disabled Households

Plan Year Approved: 2014

Implemented: 2014

Amended: 2015-2016

Description/Update: PMHA would conduct reviews of income at least once every 24 months as opposed annually. Families may continue to request interim reviews at any time. This activity would be applied to all MTW Vouchers held by households not considered “elderly” or “disabled”.

This activity was expected to simplify income verifications, saving time for PMHA staff, participants, and other agencies. PMHA anticipated this activity would reduce the costs of annual re-certifications for the program. Although time and cost savings resulted, these savings were negated by additional administrative burden imposed on other staff to monitor and track households and recertification schedules, to calculate debt resulting from household non-reporting, and to troubleshoot management systems issues related to limited tracking capabilities. Additionally, the implementation of activity HCV-9 is suspected to have contributed to the time and cost savings previously attributed to this activity.

This activity was placed on hold from May 2015 through April 2016, in order to identify eligible households and create a uniform timetable for re-certifications. The activity was re-implemented in May 2016.

This activity was put back on hold effective January 2019, due to administrative burden and issues with the management system tracking capabilities. This activity may be revisited once data is available to compare time and cost savings with implementation and without.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

B-10 Eliminate All Excluded Income from the Income Verification Process

Plan Year Approved: 2014

Implemented: 2014

Amended: N/A

Description/Update: PMHA would cease verifying any fully excluded income sources for households. This activity is expected to simplify income verifications, saving time for PMHA staff, participants, and other agencies.

While PIH 2013-04 provides guidance for this activity, the approval as a MTW activity would ensure that developed practices would continue if PIH 2013-04 is rescinded, amended, or superseded.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

B-11 Elderly and Disabled Rent Re-certifications Every Three Years

Plan Year Approved: 2014

Implemented: 2014

Amended: N/A

Description/Update: This activity allows PMHA to conduct re-certifications at least once every three years for elderly and disabled households.

This activity was expected to increase administrative efficiency and reduce costs to PHA programs through the reduction of annual re-certifications. Although time and cost savings resulted, the activity placed greater administrative burden on other staff to monitor and track households and recertification schedules, to calculate debt resulting from household non-reporting, and to troubleshoot management systems issues related to limited tracking capabilities. The implementation of activities HCV-9 and PH-14 created time and cost savings that reduced the need for this activity, while bringing to light the previously overlooked struggles with effectively managing this activity and showed that it is no longer as effective as anticipated for the relief of administrative burden.

This activity was put on hold for HCV effective April 2019 and for Public Housing effective December 2019, due to administrative burden and issues with the management system tracking capabilities. This activity may be revisited once data is available to compare time and cost savings with implementation and without.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

D. CLOSED OUT ACTIVITIES

HCV-5 Alternative Housing Quality Standards Compliance

Plan Year Approved: 2011
Implemented: 2011
Amended: N/A
Closed Out: 2014

PMHA was to use the results of municipal housing/rental housing inspections as an alternative to HQS, where available. This activity did not yield expected outcomes due to changes within inspection programs by local cities and conflict with tenant move-in schedules.

HCV-6 Time Limits for Housing Choice Voucher Participants

Plan Year Approved: 2013
Implemented: 2014
Amended: N/A
Closed Out: 2017

PMHA established time limits for the Housing Choice Voucher program. Participants who were able to work (i.e., not considered elderly or disabled, or were a parent of a child under age 1) were expected to work or attend an approved school program, or they would lose a month of eligibility of HCV assistance. Each individual was granted 36 months of unemployment/non-participation in education. When an individual reached the end of his/her 36 months, he/she would be considered ineligible for housing assistance for no less than one year, and all rent calculations for the household would be calculated on a pro-ration basis, like the treatment given to other households with ineligible members.

This activity, as written, proved difficult to track and was prone to errors. No households were impacted by this activity since its full impact would have materialized in 2018.

HCV-7 Capped Utility Reimbursement Checks

Plan Year Approved: 2012
Implemented: N/A
Amended: N/A
Closed Out: 2017

This activity was intended to eliminate “double dipping” for utility costs by setting utility allowance reimbursement maximums based on the State of Ohio’s PIPP Plus program, a program that subsidizes low-income households’ utilities by allowing them to pay utility bills on the basis of income, not on the amount of service used. However, these same families were eligible for and receiving utility reimbursement checks with the intention to pay off their entire month’s utility bill.

It was determined that the cost for software changes was not affordable for the value gained from the activity.

HCV-8 Transitional Housing Vouchers

Plan Year Approved: 2012
Implemented: 2012
Amended: N/A
Closed Out: 2017

This activity provided a one-year voucher to families. Intensive supportive services were provided to participants, with an emphasis on employment and self-sufficiency. The voucher ended after one year and was not renewable.

Requests for transitional housing vouchers elapsed over the last three years this activity was in place. This was due to the service provider not accepting new program families and restrictions limiting the time for participation in the program.

HCV-11 Permit Households at \$0 HAP to Self-Certify Income

Plan Year Approved: 2014
Implemented: 2014
Amended: N/A
Closed Out: 2022

This activity permitted families who were at \$0 HAP to self-certify their income rather than be subjected to a verification process that should have no effect on housing assistance levels, thus reducing costs and staff time while achieving greater cost effectiveness in Federal expenditures.

This activity was closed out at the implementation of Activity B-13, which allows self-certification to serve as the highest form of income verification for all types of income for all households.

HCV-12 Use Lesser of Actual Unit Size or Unit Size of Voucher Issued for Utility Allowances

Plan Year Approved: 2014
Implemented: N/A
Amended: N/A
Closed Out: 2014

PMHA applied the lesser utility allowance of either the actual unit size leased by the family, or the unit size of the voucher issued.

This proposed activity was passed into Federal Law in July 2014. This activity was included in the 2014 Plan prior to the passing into Federal Law.

PH-1 Escalating Minimum Rent

Plan Year Approved: 2008
Implemented: 2008
Amended: N/A
Closed Out: 2011

PMHA established a schedule of minimum rents that started at \$25 per month and would increase every two years by \$25.

PMHA discarded the activity after recognizing that its implementation was unduly administratively burdensome and was not expected to accomplish the goals of encouraging work activity and self-sufficiency. Other rent reform activities with more promising results made this activity undesirable.

PH-3 Elderly and Disabled Household Rent Recertifications Biennially

Plan Year Approved: 2000
Implemented: 2000
Amended: N/A
Closed Out: 2014

PMHA conducted rent re-certifications for elderly and disabled households every two years instead of annually. The activity was expanded to triennial rent re-certification in 2014 and was identified as Activity B-11.

PH-4 Change in Employment Income

Plan Year Approved: 2008
Implemented: 2012
Amended: N/A
Closed Out: 2025

Changes in employment income resulting in an increase in annual income of *any amount* were not processed until the next annual re-certification. However, residents were expected to report changes.

This activity is being discontinued because HOMTA provisions are more streamlined and generous to the tenant; therefore, this activity will no longer be impactful to the tenant and will be eliminated effective January 1, 2025 upon implementation of HOMTA requirements.

PH-5 Rent Adjustment for Income Decreases

Plan Year Approved: 2009
Implemented: 2009
Amended: N/A
Closed Out: 2025

Decreases in income of less than \$1,000, or lasting less than 30 days, were not processed until the next annual re-certification. This rent reform activity was seldom used. However, whenever a household experienced an income decrease less than \$1,000, the time to process the decrease was costly to the PMHA and had minimal impact on the household when the income decrease lasted less than 30 days. On many occasions, households located new employment or other sources of income within 30 days. Thus, the PMHA viewed this activity as being effective as a cost-savings feature.

This activity is being discontinued because HOMTA provisions are more streamlined and generous to the tenant; therefore, this activity will no longer be impactful to the tenant and will be eliminated effective January 1, 2025 upon implementation of HOMTA requirements.

PH-6 Overall Percentage of Income Amounts for Rent Calculations

Plan Year Approved: 2012
Implemented: 2012
Amended: N/A
Closed Out: 2018

The percentage of earned income was set at 26% of income in an effort to promote work activity and offset the elimination of the allowance for non-reimbursed childcare expenses.

This activity was discontinued due to a revised rent-reform policy with a flat 29.6% of income calculation, known as Activity PH-14.

PH-7 Eliminate Allowance for Non-Reimbursed Childcare Expenses and Replace with 4% Overall percentage of earned income

Plan Year Approved: 2012
Implemented: 2012
Amended: N/A
Closed Out: 2018

Allowances for non-reimbursed childcare expenses were eliminated from rent calculations in part of an overall rent reform that reduced the percentage of income counted towards rent for households with earned income. The purpose of this feature was to simplify rent calculations for transparency shared by both residents and PHA staff, as well as reduce the administrative burden relating to documentation.

This activity was discontinued due to a revised rent-reform policy with a flat 29.6% of income calculation, known as Activity PH-14.

PH-8 Deduction for Elderly and Disabled Adults

Plan Year Approved: 2009
Implemented: N/A
Amended: N/A
Closed Out: 2014

PMHA was considering increasing the deduction from income from \$400 to a higher amount. It was intended to be included as part of a larger rent reform initiative but was ultimately not included due to cost and funding reasons.

PH-9 Providing Transitional Housing

Plan Year Approved: 1999
Implemented: 1999
Amended: N/A
Closed Out: 2012

Up to 42 units of transitional housing were set aside for previously homeless families at Renaissance Place and Community Estates. Through a partnership with Family and Community Services, Inc. (F&CS) and its Portage Area Transitional Housing (PATH) program, residents received on-site intensified case management services as they moved toward self-sufficiency over the course of a two-year time limit.

This program proved to be costly to PMHA due to higher turnover and shorter participation limits. Additionally, funding for transitional housing from HUD and other sources had progressively declined as the emphasis shifted nationally to a Housing First model.

PH-11 Deduction for Absent Child

Plan Year Approved: 2009
Implemented: N/A
Amended: N/A
Closed Out: 2013

PMHA discarded this activity as it became clear that there would be substantial administrative difficulties in implementing and maintaining the activity. The number of households that had split families, with both families receiving Public Housing assistance at the same time, was also minimal at best. The most frequent, and burdensome to families, scenario was that some subsidized families pay child support to families not being subsidized for housing, and thus not eligible for the activity.

PH-12 Cap on Dependent Child Deduction

Plan Year Approved: 1999
Implemented: 2000
Amended: 2014
Closed Out: 2018

The Public Housing Program gave a \$480 allowance for each family member (other than the head or spouse), who was disabled or a minor, and for family members who were 18 and older who were full-time students or who were disabled. This allowance was not to exceed \$960, except that current residents as of April 23, 1999, were entitled to an allowance of \$480 for each family member who was a minor and for family members who were 18 and older and full-time students or who were disabled as of June 1, 2000.

This activity was discontinued for Public Housing due to a revised rent-reform policy with a flat 29.6% of income calculation, known as Activity PH-14.

PH-13 Residents paying ceiling rents may self-certify income

Plan Year Approved: 2015
Implemented: 2016
Amended: N/A
Closed Out: 2022

Residents paying ceiling rents were allowed to self-certify their income for the purposes of the re-verification process. Such families paid the same rental amount regardless of income increases. This activity resulted in reducing costs by saving staff time devoted to income verification and also achieved greater cost effectiveness in federal expenditures.

This activity was closed out at the implementation of Activity B-13, which allows self-certification to serve as the highest form of income verification for all types of income for all households.

B-2 Cap on Dependent Child Deduction

Plan Year Approved: 1999
Implemented: 2000
Amended: 2014
Closed Out: 2018

This activity was amended to end for the Housing Choice Voucher Program in 2014 due to revised rent-reform policies which included a flat 29.6% of income calculation.

This activity was discontinued for Public Housing and closed out in 2018 due to a revised rent-reform policy with a flat 29.6% of income calculation, known as Activity PH-14.

B-5 Single Fund Budget Flexibility

Plan Year Approved: 2009
Implemented: 2009
Amended: N/A
Closed Out: 2014

PMHA was authorized to use single fund budgeting and full fungibility for specified funds under the restated MTW agreement and had used this authority in limited measures since that time.

In discussions with the MTW office, it was determined that this activity is no longer considered a MTW activity for the purposes of the current activities section of this plan, and it is no longer reported as such.

B-6 Income Verifications Conducted for Approved Government Programs May Be Substituted for PMHA Income Verifications if Performed Within 90 Days

Plan Year Approved: 2009
Implemented: N/A
Amended: N/A
Closed Out: 2014

PMHA would use the information gathered and certified by residents, in their eligibility determinations performed for other means-tested programs, if this information were no older than 90 days.

This activity was not implemented after changes in leadership at other agencies diminished the willingness to exchange information with the Housing Authority.

B-7 Employment and Education Deductions

Plan Year Approved: 1999
Implemented: 2000
Amended: 2012
Closed Out: 2015

PMHA discontinued this activity in 2012 for Public Housing residents. Replacing this activity was the implementation of a 4% deduction on all earned income and an income exclusion for new earnings until annual re-certification.

The activity was discontinued for HCV program in 2015 due to rent reform activities and subsequently closed out.

SECTION V: SOURCES AND USES OF FUNDS

4. ESTIMATED SOURCES AND USES OF MTW FUNDS

i. Estimated Sources of MTW Funds

The MTW PHA shall provide the estimated sources and amount of MTW funding by Financial Data Schedule (FDS) line item.

Note: the information collected in this section is to fulfill MTW programmatic reporting requirements and does not replace the MTW PHA's obligation to annually complete its audited financial statements through HUD's Financial Data Schedule (FDS).

FDS LINE ITEM NUMBER	FDS LINE ITEM NAME	DOLLAR AMOUNT
70500 (70300+70400)	Total Tenant Revenue	\$843,616
70600	HUD PHA Operating Grants	\$15,529,421
70610	Capital Grants	\$959,816
70700 (70710+70720+70730+70740+70750)	Total Fee Revenue	\$0
71100+72000	Interest Income	\$58,046
71600	Gain or Loss on Sale of Capital Assets	(\$8,137)
71200+71300+71310+71400+71500	Other Income	\$182,079
70000	Total Revenue	\$17,564,841

ii. Estimated Uses of MTW Funds

The MTW PHA shall provide the estimated uses and amount of MTW spending by Financial Data Schedule (FDS) line item.

Note: the information collected in this section is to fulfill MTW programmatic reporting requirements and does not replace the MTW PHA's obligation to annually complete its audited financial statements through HUD's Financial Data Schedule.

FDS LINE ITEM NUMBER	FDS LINE ITEM NAME	DOLLAR AMOUNT
91000 (91100+91200+91400+91500+91600+91700+91800+91900)	Total Operating - Administrative	\$2,178,991
91300+91310+92000	Management Fee Expense	\$583,991
91810	Allocated Overhead	\$0
92500 (92100+92200+92300+92400)	Total Tenant Services	\$25,142
93000 (93100+93600+93200+93300+93400+93800)	Total Utilities	\$323,508
93500+93700	Labor	\$0
94000 (94100+94200+94300+94500)	Total Ordinary Maintenance	\$1,573,561
95000 (95100+95200+95300+95500)	Total Protective Services	\$0
96100 (96110+96120+96130+96140)	Total Insurance Premiums	\$143,439
96000 (96200+96210+96300+96400+96500+96600+96800)	Total Other General Expenses	\$206,357
96700 (96710+96720+96730)	Total Interest Expense & Amortization Cost	\$117,188
97100+97200	Total Extraordinary Maintenance	(\$31,947)
97300+97350	HAP + HAP Portability-In	\$10,532,262
97400	Depreciation Expense	\$699,641
97500+97600+97700+97800	All Other Expense	\$0
90000	Total Expenses	\$16,352,133

Please describe any variance between Estimated Total Revenue and Estimated Total Expenses:

PMHA received funds from HUD-held reserves for costs that are reflected in Construction in Progress on the Statement of Net Position. PMHA also received PH Shortfall funds and HAP Reconciliation funds in 2023.

ii. Description of Planned Use of MTW Single Fund Flexibility

MTW agencies have the flexibility to apply fungibility across three core funding programs’ funding streams – public housing Operating Funds, public housing Capital Funds, and HCV assistance (to include both HAP and Administrative Fees) – hereinafter referred to as “MTW Funding.” The MTW PHA shall provide a thorough narrative of planned activities it plans to undertake using its unspent MTW Funding. Where possible, the MTW PHA may provide metrics to track the outcomes of these programs and/or activities. Activities that use other MTW authorizations in Attachment C and/or D of the Standard MTW Agreement (or analogous section in a successor MTW Agreement) do not need to be described here, as they are already found in Section (III) or Section (IV) of the Annual MTW Plan. The MTW PHA shall also provide a thorough description of how it plans to use MTW funding flexibility to direct funding towards specific housing and/or service programs and/or other MTW activity, as included in an approved MTW Plan.

PLANNED APPLICATION OF MTW FUNDING FLEXIBILITY

PMHA plans to use the MTW Single-Fund Flexibility to combine its funding sources to form an MTW Block Grant that will be used to administer current and future MTW projects and activities, and support areas of need, such as operational expenses including salaries, capital fund projects, and housing assistance. PMHA plans to operate its Public Housing, Section 8 assistance, and Capital Fund as a single fund budget with full flexibility.

Uses of MTW single fund flexibility include the following: Utilize MTW funds for extraordinary maintenance, enhanced security, and renovation/rehabilitation of PMHA-owned existing affordable housing; utilize savings achieved through MTW initiatives to over-lease and provide HCV assistance to more households than permissible under our HUD-established baseline; and to continue operations during any current and/or future government shutdown and/or emergencies declared by the Federal, State or local government.

In the 2023 plan year, PMHA was approved to use its MTW single fund flexibility with respect to its HCV HAP funds and/or any other funds during the fiscal year and ongoing, for other expenses to assist households to lease units. These activities may include the following:

1. Administrative Activities – This includes front-line, day-to-day operational activities including but not limited to applicant intake, lease-up activities, income determinations and reexaminations, unit inspections, disbursing HAP to landlords, as well as policy and operational planning and implementation, financial management, and HCV record-keeping and reporting. These activities also include the indirect overhead activities associated with operating the HCV program including but not limited to PHA management, human resources, legal, finance, accounting and payroll, information technology, procurement, and quality control. Administrative activities could also include housing search assistance activities such as pre-move counseling, helping a family identify and visit potentially available units during their housing search, helping a family find a unit that meets the household’s disability-related needs, providing transportation and directions, and assisting with the completion of rental applications. These activities also include post-lease up activities often related to housing search assistance efforts, such as post-move counseling and landlord/tenant mediation. These activities cover HCV owner recruitment and outreach activities, including the costs associated with materials or webpages specifically geared to owners, as well as landlord liaison staff and associated expenses.

2. Security Deposit Assistance – PMHA may provide security deposit assistance for the family. The amount of the security deposit assistance will not exceed the actual security deposit required by the owner or the maximum security deposit allowed under applicable state and/or local law. PMHA may pay the security deposit directly to the owner or may pay the assistance to the family provided PMHA verifies the family paid the security deposit. PMHA may place conditions on the security deposit assistance, such as requiring the owner or family to return the security deposit assistance to PMHA at the end of the family’s tenancy (less any amounts retained by the owner in accordance with the lease).

3. Utility Deposit Assistance / Utility Arrears – PMHA may provide utility deposit assistance for some or all of the family’s utility deposit expenses. Assistance can be provided for deposits (including connection fees) required for the utilities to be supplied by the tenant under the lease. PMHA may choose to pay the utility deposit assistance directly to the utility company or may pay the assistance to the family, provided PMHA verifies the family paid the utility deposit. PMHA may place conditions on the utility deposit assistance, such as requiring the utility supplier or family to return the utility deposit assistance to PMHA at such time the deposit is returned by the utility supplier (less any amounts retained by the utility supplier.) In addition, some families may have large balances with gas, electric, water, sewer, or trash companies prior to admission to the HCV program that will make it difficult if not impossible to establish services for tenant-supplied utilities. PMHA may also provide the family with assistance to help address these utility arrears to facilitate leasing and their admission to the HCV program.

4. Application Fees – PMHA may assist the family with some or all of the following expenses: application fees/non-refundable administrative or processing fees/refundable application deposit assistance/broker fees.

5. Holding Fees – PMHA may cover part or all of the holding fee for units where the fee is required by the owner after a tenant’s application has been accepted but before the lease signing. PMHA and the owner must agree how the holding fee gets rolled into the deposit and under what conditions the fee will be returned. Furthermore, owners need to accept responsibility for making needed repairs to a unit required by the initial housing quality standards (HQS) inspection and can only keep the holding fee if the family is at fault for not entering into the lease.

6. Renter’s Insurance (if required by the lease) – PMHA may assist the family with some or all of the cost of renter’s insurance but only in cases where the purchase of renter’s insurance is a condition of the lease and is also required of unassisted families on the premises.

In 2025, PMHA proposes to use its MTW single fund flexibility with respect to its HCV HAP funds and/or any other funds during the fiscal year and ongoing, for the following activity:

1. Main Office Parking Lot Expansion – PMHA plans to add 20-25 additional parking spaces at the south end of the main office building. A retaining wall will be built where the parking lot meets yard space. Additionally, several parking spaces will be added to the paved area at the south end of the maintenance garage. This project is necessary because the current parking lot does not provide adequate parking space for staff and clients. Additional parking is needed to better serve our clients, as the main office is the hub where clients come to use the lobby, including the lobby computer lab, to complete intake, and to meet with staff for various purposes.

Prior to undertaking any of these activities, PMHA will first adopt a policy in the PMHA Section 8 Administrative Plan that governs the terms and conditions of the activity, including any limitations or eligibility criteria for these activities (e.g., to support families leasing units in areas of opportunity, or to support vulnerable populations such as homeless families, etc.). PMHA will not create policies, criteria, or methods of administration that result in discrimination against individuals with protected characteristics under fair housing and civil rights laws and regulations. As such, PMHA will provide reasonable accommodations when necessary to policies established for these activities to ensure equal access to their programs and activities by individuals with disabilities.

iii. **Planned Application of PHA Unspent Operating Fund and HCV Funding**

Original Funding Source	Beginning of FY - Unspent Balances	Planned Application of PHA Unspent Funds during FY
HCV HAP*	\$5,633,249	\$2,940,687 (HCV Reserves)
HCV Admin Fee	\$557,640	\$0
PH Operating Subsidy	\$334,922	\$0
TOTAL:	\$6,525,811	\$2,940,687

Description of Planned Expenditures of Unspent Operating Fund and HCV Funding

The MTW PHA shall provide a description of planned activities and/or use(s) for unexpended Operating Fund and HCV Funding. The original funding source is defined as the legacy MTW PHA's appropriated Section 8 and Section 9 funding source(s) (HCV HAP, HCV Admin Fee, and PH Operating Subsidy). The MTW agency receives this information in their Annual Renewal Allocation, which provides a breakdown of the annual obligations for HCV HAP. For HCV Admin Fee, the biannual cash management reconciliation includes the HCV Admin Fee that has been earned at two points during the year; midyear at June 30th and end-of-year at December 31st. For the public housing operating fund unspent balance, the MTW PHA may derive their unspent funds by subtracting current assets from current liabilities in the most recent FDS submission. Current assets are the sums of FDS lines 111, 114, 115, 120, 131, 135, 142, 144, and 145. Current liabilities are the sums of FDS line 310 and 343. Table XX below represents the applicable FDS lines with definitions that MTW PHA(s) should utilize to calculate public housing operating fund unspent funds. More information on FDS line items can be found at: https://www.hud.gov/sites/dfiles/PIH/documents/FDSLLineDefinitionGuide_vJuly2020.pdf.

FDS Line Items Used to Calculate Public Housing Operating Fund Unspent Funds

FDS Line Number	FDS Line Item	Definition
Current Assets		
111	Cash-Unrestricted	This FDS line represents cash and cash equivalents in any form available for use to support any activity of the program or project.
114	Cash-Tenant Security Deposits	This FDS line represents cash in the Security Deposit Fund.
115	Cash-Restricted for Payment of Current Liabilities	This line represents restricted cash and cash equivalents that are only to be expended for specified purposes.
120	Total Receivables	This line represents the total of all receivables less the amounts established as allowances for estimated uncollectible amounts.
131	Investments-Unrestricted	This line represents the fair market value of all investments which can be used to support any activity of a program, project, activity, COCC, or entities.
135	Investments-Restricted for Payment of Current Liability	This line represents the fair market value of all investments designated for specific purposes that will be used to liquidate a current liability in the next fiscal year or offset unearned revenue.
142	Prepaid Expenses and Other Assets	This line represents all prepaid expenses. These are not expected to be converted.
144	Inter-program-Due From	This line represents amounts due from other PHA projects, programs, and activities of a temporary nature.

FDS Line Number	FDS Line Item	Definition
145	Assets Held for Sale	This line item represents assets that the entity expects to sell to qualified applicants. This line item is typically used as part of the homeownership program.
Current Liabilities		
310	Total Current Liabilities	This FDS line is the sum of lines 311 through 348 and represents the total of all current liabilities.
343	Current Portion of Long-Term Debt (Capital Projects/Bonds)	This line includes the current portion of debts acquired and debts issued for capital purposes of the PHA/entity.

For HCV funding, the biannual cash management reconciliation for HUD-held reserves includes both HCV and SPV reserves. MTW PHA(s)' accounting records should include sufficient detail to report on the amount that are HCV versus SPV reserves. Where possible, please identify the planned use, the estimated amount, to which funding source the planned use(s) is attributable, as well as the projected timeline or timeline update.

Note: the information collected in this section is to fulfill MTW programmatic reporting requirements and does not replace the MTW PHA's obligation to annually complete its audited financial statements through HUD's Financial Data Schedule.

Estimated uses of MTW funds exceed estimated sources of funds for 2025. The planned uses of HUD-held reserves during the fiscal year are described in the Additional Appendix Items section of this Plan.

* Unspent HAP funding should not include amounts recognized as Special Purpose Vouchers reserves.

** HUD's approval of the MTW Plan does not extend to a PHA's planned usage of unspent funds amount entered as an agency's operating reserve. Such recording is to ensure agencies are actively monitoring unspent funding levels and usage(s) to ensure successful outcomes as per the short- and long-term goals detailed in the Plan.

5. LOCAL ASSET MANAGEMENT PLAN

- i. Is the MTW PHA allocating costs within statute?
- ii. Is the MTW PHA implementing a local asset management plan (LAMP)?
- iii. Has the MTW PHA provide a LAMP in the appendix?
- iv. If the MTW PHA has provided a LAMP in the appendix, please describe any proposed changes to the LAMP in the Plan Year or state that the MTW PHA does not plan to make any changes in the Plan Year.

6. RENTAL ASSISTANCE DEMONSTRATION (RAD) PARTICIPATION

- i. **Description of RAD Participation**
The MTW PHA shall provide a brief description of its participation in RAD. This description must include the proposed and/or planned number of units to be converted under RAD, under which component the conversion(s) will occur, and approximate timing of major milestones. The MTW PHA should also give the planned/actual submission dates of all RAD Significant Amendments. Dates of any approved RAD Significant Amendments should also be provided.

RENTAL ASSISTANCE DEMONSTRATION (RAD) PARTICIPATION

N/A – None

- ii. Has the MTW PHA submitted a RAD Significant Amendment in the appendix? A RAD Significant Amendment should only be included if it is a new or amended version that requires HUD approval.

No


- iii. If the MTW PHA has provided a RAD Significant Amendment in the appendix, please state whether it is the first RAD Significant Amendment submitted or describe any proposed changes from the prior RAD Significant Amendment?

N/A

SECTION VI: ADMINISTRATIVE

A. BOARD RESOLUTION AND CERTIFICATIONS OF COMPLIANCE

The PMHA Board Resolution, the Certifications of Compliance (HUD Form 50900), and the Certifications by State or Local Officials of PHA Plans Consistency with the Consolidated Plan (form HUD-50077-SL) appear below.

	<p>Resolution No. <u>24-30</u></p> <p>APPROVING 2025 MOVING TO WORK ANNUAL PLAN</p> <p><i>WHEREAS</i>, as directed by the Moving To Work (MTW) Revised Agreement requirement that all Public Housing Authorities prepare and submit an Annual and 5-Year Plan, the Portage Metropolitan Housing Authority has drafted an Agency Plan and related policies following a public hearing process; and</p> <p><i>WHEREAS</i>, the Board of Portage Metropolitan Housing Authority has reviewed the draft documents and resident comments;</p> <p><i>NOW, THEREFORE, BE IT RESOLVED</i> that the Board of the Portage Metropolitan Housing Authority hereby certifies that the public hearing requirement has been met and further approves the following:</p> <ol style="list-style-type: none">1. 2025 Moving To Work Annual Plan2. HUD Form 50077, Certification of Compliance <p><i>Passed by the PMHA September 24, 2024</i></p> <p>PORTAGE METROPOLITAN HOUSING AUTHORITY</p> <p>BY:</p> <p> _____ Chairman</p> <p> _____ Secretary</p> <p style="text-align: right; font-size: small;">I, Pamela Nation Calhoun, Secretary of the Board of the PMHA, do hereby certify that the foregoing is a true and correct copy of a Resolution of the PMHA duly adopted September 24, 2024, and that all deliberations of this Board were in meetings open to the public, in compliance with all legal requirements including Sec. 121.22 of the ORC.</p>	
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CERTIFICATIONS OF COMPLIANCE

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT OFFICE OF PUBLIC AND INDIAN HOUSING

Certifications of Compliance with Regulations: Board Resolution to Accompany the Annual Moving to Work Plan

Acting on behalf of the Board of Commissioners of the Moving to Work Public Housing Agency (MTW PHA) listed below, as its Chair or other authorized MTW PHA official if there is no Board of Commissioners, I approve the submission of the Annual Moving to Work Plan for the MTW PHA Plan Year beginning 01/01/2025, hereinafter referred to as "the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:

- (1) The MTW PHA published a notice that a hearing would be held, that the Plan and all information relevant to the public hearing was available for public inspection for at least 30 days, that there were no less than 15 days between the public hearing and the approval of the Plan by the Board of Commissioners, and that the MTW PHA conducted a public hearing to discuss the Plan and invited public comment.
- (2) The MTW PHA took into consideration public and resident comments (including those of its Resident Advisory Board or Boards) before approval of the Plan by the Board of Commissioners or Board of Directors in order to incorporate any public comments into the Annual MTW Plan.
- (3) The MTW PHA certifies that the Board of Directors has reviewed and approved the budget for the Capital Fund Program grants contained in the Capital Fund Program Annual Statement/Performance and Evaluation Report, form HUD-50075.1 (or successor form as required by HUD).
- (4) The MTW PHA will carry out the Plan in conformity with Title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990.
- (5) The Plan is consistent with the applicable comprehensive housing affordability strategy (or any plan incorporating such strategy) for the jurisdiction in which the PHA is located.
- (6) The Plan contains a certification by the appropriate state or local officials that the Plan is consistent with the applicable Consolidated Plan.
- (7) The MTW PHA will affirmatively further fair housing by fulfilling the requirements set out in HUD regulations found at Title 24 of the Code of Federal Regulations, including regulations in place at the time of this certification, and any subsequently promulgated regulations governing the obligation to affirmatively further fair housing. The MTW PHA is always responsible for understanding and implementing the requirements of HUD regulations and policies, and has a continuing obligation to affirmatively further fair housing in compliance with the 1968 Fair Housing Act, the Housing and Community Development Act of 1974, The Cranston-Gonzalez National Affordable Housing Act, and the Quality Housing and Work Responsibility Act of 1998. (42 U.S.C. 3608, 5304(b)(2), 5306(d)(7)(B), 12705(b)(15), and 1437C-1(d)(16)). The MTW PHA will affirmatively further fair housing by fulfilling the requirements at 24 CFR 903.7(o) and 24 CFR 903.15, which means that it will take meaningful actions to further the goals identified in its Analysis of Impediments to Fair Housing Choice(AI),Assessment of Fair Housing (AFH), and/or other fair housing planning documents conducted in accordance with the requirements of 24 CFR Part 5, that it will take no action that is materially inconsistent with its obligation to affirmatively further fair housing, and that it will address fair housing issues and contributing factors in its programs, in accordance with 24 CFR 903.7(o), and will address impediments to fair housing choice identified in its AI, AFH, and/or other fair housing planning documents associated with any applicable Consolidated or Annual Action Plan under 24 CFR Part 91.
- (8) The MTW PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975 and HUD's implementing regulations at 24 C.F.R. Part 146.
- (9) In accordance with 24 CFR 5.105(a)(2), HUD's Equal Access Rule, the MTW PHA will not make a determination of eligibility for housing based on sexual orientation, gender identity, or marital status.
- (10) The MTW PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.
- (11) The MTW PHA will comply with the requirements of section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low-or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part 75.
- (12) The MTW PHA will comply with requirements with regard to a drug free workplace required by 24 CFR Part 24, Subpart F.

- (13) The MTW PHA will comply with requirements with regard to compliance with restrictions on lobbying required by 24 CFR Part 87, together with disclosure forms if required by this Part, and with restrictions on payments to influence Federal Transactions, in accordance with the Byrd Amendment and implementing regulations at 49 CFR Part 24.
- (14) The MTW PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.
- (15) The MTW PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).
- (16) The MTW PHA will provide HUD or the responsible entity any documentation needed to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58. Regardless of who acts as the responsible entity, the MTW PHA will maintain documentation that verifies compliance with environmental requirements pursuant to 24 Part 58 and 24 CFR Part 50 and will make this documentation available to HUD upon its request.
- (17) With respect to public housing and applicable local, non-traditional development the MTW PHA will comply with Davis-Bacon or HUD determined wage rate requirements under section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.
- (18) The MTW PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.
- (19) The MTW PHA will comply with the Lead-Based Paint Poisoning Prevention Act and 24 CFR Part 35.
- (20) The MTW PHA will comply with the policies, guidelines, and requirements of 2 CFR Part 225 (Cost Principles for State, Local and Indian Tribal Governments) and 2 CFR Part 200.
- (21) The MTW PHA must fulfill its responsibilities to comply with and ensure enforcement of Housing Quality Standards, as defined in 24 CFR Part 982 or as approved by HUD, for any Housing Choice Voucher units under administration.
- (22) The MTW PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the Moving to Work Agreement and Statement of Authorizations and included in its Plan.
- (23) All attachments to the Plan have been and will continue to be available at all times and all locations that the Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the MTW PHA in its Plan and will continue to be made available at least at the primary business office of the MTW PHA.

Portage Metropolitan Housing Authority
MTW PHA NAME

OH031
MTW PHA NUMBER/HA CODE

I/We, the undersigned, certify under penalty of perjury that the information provided above is true and correct. WARNING: Anyone who knowingly submits a false claim or makes a false statement is subject to criminal and/or civil penalties, including confinement for up to 5 years, fines, and civil and administrative penalties. (18 U.S.C. §§ 287, 1001, 1010, 1012; 31 U.S.C. §3729, 3802).

Thomas Sicuro
NAME OF AUTHORIZED OFFICIAL

Board Chairman
TITLE


SIGNATURE

09/24/2024
DATE

* *Must be signed by either the Chair or Secretary of the Board of the MTW PHA's legislative body. This certification cannot be signed by an employee unless authorized by the MTW PHA Board to do so. If this document is not signed by the Chair or Secretary, documentation such as the by-laws or authorizing board resolution must accompany this certification.*

**Certification by State or Local
Official of PHA Plans Consistency
with the Consolidated Plan or
State Consolidated Plan
(All PHAs)**

U. S Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 3/31/2024

**Certification by State or Local Official of PHA Plans
Consistency with the Consolidated Plan or State Consolidated Plan**

I, Todd Peetz, the Director, Portage County Regional Planning Commission
Official's Name *Official's Title*

certify that the 5-Year PHA Plan for fiscal years _____ and/or Annual PHA Plan for fiscal
year 2025 of the Portage Metropolitan Housing Authority (PMHA) is consistent with the
PHA Name


Consolidated Plan or State Consolidated Plan including the Analysis of Impediments (AI) to Fair
Housing Choice or Assessment of Fair Housing (AFH) as applicable to the

County of Portage, State of Ohio
Local Jurisdiction Name

pursuant to 24 CFR Part 91 and 24 CFR § 903.15.

Provide a description of how the PHA Plan's contents are consistent with the Consolidated Plan or
State Consolidated Plan. PMHA provides and implements public and subsidized housing programs to address the housing needs
of low-to-moderate income households within Portage County, Ohio. It also offers the opportunity for homeownership. Portage County
sees an increase in the number of residents over 55 years of age, as well as residents with fewer job opportunities since the decline of
jobs in manufacturing. Thus, affordable housing is integral to meeting the needs of those aging and those employed but receiving low
wages. Indicators, such as the Section 8 Administrative Plan and the Public Housing Admissions and Continued Occupancy Plan
demonstrate that PMHA complies with Fair Housing principles.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will
prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Authorized Official Todd Peetz	Title: Director, Portage County Regional Planning Commission
Signature: 	Date: <u>7/31/24</u>

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. This information is collected to
ensure consistency with the consolidated plan or state consolidated plan.

Public reporting burden for this information collection is estimated to average 0.16 hours per year 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.

B. DOCUMENTATION OF PUBLIC PROCESS

PMHA distributed surveys online and in paper format to all Public Housing residents to develop ideas for the 2025 Annual Plan. The survey was emailed to all residents for which PMHA had current email addresses, via Survey Monkey, and distributed in paper format at Resident Services events. Residents who preferred to utilize a paper survey were provided the option to turn it in at Resident Services events, mail it back in, place it in the office drop box, or scan/photograph and email it to Carolyn Budd, Special Programs Manager. Residents were invited to participate in the survey from April 30, 2024 through May 30, 2024. A total of 52 households participated in the survey. Records of all survey responses are kept at the PMHA main office.

The final draft of the 2025 MTW Plan was made available for public review on August 8, 2024, with a public hearing held on September 9, 2024.

PMHA utilizes existing PMHA staff members for collecting information for the purposes of evaluating MTW program activities, for reporting program results in the annual MTW Report to HUD, and for the purposes of planning and developing future MTW Plans. PMHA does not hire any independent outside evaluators to perform assessments of the activities or of the MTW program, as a whole.

Public Hearing Agenda



Portage Metropolitan Housing Authority

Public Hearing – PMHA’s Moving To Work 2025 Annual Plan

Monday, September 9, 2024 at 2:00 p.m.

AGENDA

- I. Introduction**
- II. Background on Moving to Work Program**
- III. Three Statutory Goals**
 - Reduce Cost and achieve greater cost effectiveness in federal expenditures
 - Create incentives for families to work, seek work, or prepare for work
 - Increase housing choices for low-income families
- IV. Review of PMHA’s Moving to Work 2025 Annual Plan**
- V. New or Revised Goals and/or Activities**
 - One (1) proposed new activity and three (3) proposed revised activities
 - HCV-18: Payment Standards at 120% of the FMR (New)
 - HCV-2: MTW Homeownership Voucher Program (Revised)
 - HCV-16: Section 8 Landlord Incentive Program (Revised)
 - B-1: Exclusion of Overtime, Bonuses, and Income from Assets (Revised)
 - Updates on projects from the 2021 and 2022 Plans
 - Updates on projects from the 2023 and 2024 Plans utilizing HUD-Held Reserves
 - Five (5) new proposed projects in the 2025 Plan
 - Development of up to five (5) housing units
 - Public Housing summer camps
 - Public Housing summer camp staffing
 - PHA-wide parking lot, driveway and sidewalk replacement
 - Improvements to the ORC
 - Main office parking lot expansion
- VI. Other Issues / Questions**
- VII. Adjournment**

Public Hearing Minutes



Portage Metropolitan Housing Authority

Public Hearing - 2025 Moving To Work Annual Plan

Monday, September 9, 2024 at 2:00 p.m.

2832 State Route 59, Ravenna, OH 44266

MINUTES

The Public Hearing convened at 2:00 p.m. at the PMHA office by Ashleigh Paolucci, PMHA Housing Assistant.

No other persons were in attendance. No verbal comments were made for recording. No written comments were submitted for review, and no issues were brought forward.

The meeting was adjourned at 2:20 p.m.

Respectfully submitted by:



Ashleigh Paolucci
PMHA Housing Assistant

Public Hearing Attendance Record



Attendance Sheet for the 2025 Moving To Work Annual Plan Public Hearing


Portage Metropolitan Housing Authority
2832 State Route 59, Ravenna OH 44266

Monday, September 9, 2024, at 2:00 p.m.

Name:	Address, Phone Number, Email:
	<i>Additional space on back of page</i>

Classified Advertisement in the Record-Courier

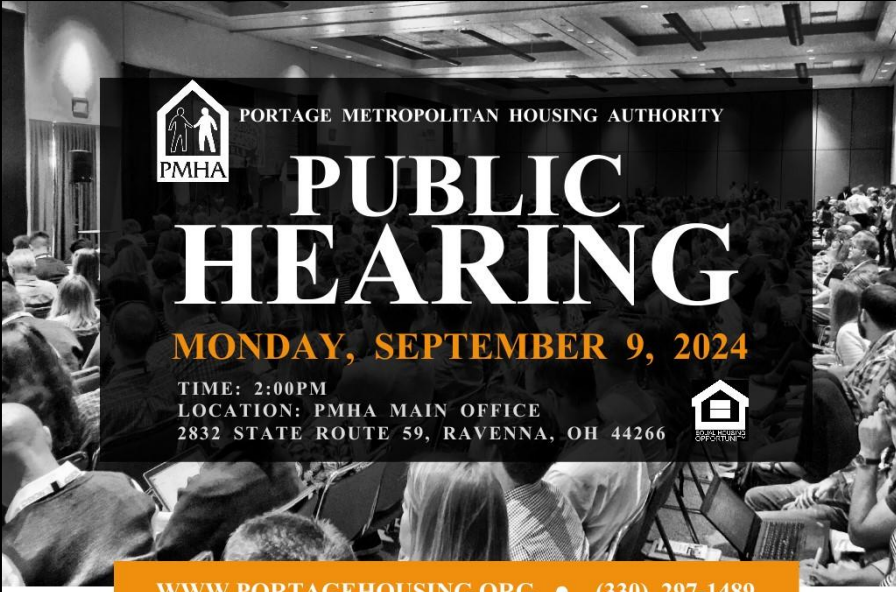
Documentations of Public Notice, as published in Record-Courier and flyer format, are below:



Public Notices

Originally published at record-courier.com on 08/06/2024

Portage Metropolitan Housing Authority's 2025 Moving to Work Annual Plan is available for public review and comment from August 10, 2024, to and including September 9, 2024. A Public Hearing discussing the Annual Plan will be held at the PMHA office, 2832 State Route 59, Ravenna, Ohio on September 9, 2024, at 2:00 p.m. A copy of the 2025 Annual Plan is available upon request by e-mail to cbudd@portagehousing.org or at the office address listed above.
#10446775 8/6/2024



The flyer features a background image of a public hearing in progress. Overlaid on the image is the PMHA logo (a house icon with a person and a child) and the text: "PORTAGE METROPOLITAN HOUSING AUTHORITY", "PUBLIC HEARING", "MONDAY, SEPTEMBER 9, 2024", "TIME: 2:00PM", "LOCATION: PMHA MAIN OFFICE", "2832 STATE ROUTE 59, RAVENNA, OH 44266". At the bottom of the flyer is an orange bar with the text: "WWW.PORTAGEHOUSING.ORG • (330) 297-1489".

The Portage Metropolitan Housing Authority's (PMHA's) proposed 2025 Moving to Work (MTW) Annual Plan is available for public review and comment from August 10, 2024 to and including September 9, 2024. A public hearing discussing the Annual Plan will be held at the PMHA office on Monday, September 9, 2024 at 2:00 p.m.

A draft of PMHA's proposed 2025 MTW Annual Plan is available for review online at PMHA's website, at www.portagehousing.org. A copy of the Annual Plan is available upon request by email to cbudd@portagehousing.org or at the office address listed above. Questions or comments should be directed to Carolyn Budd, Special Programs Manager.

C. PLANNED AND ONGOING EVALUATIONS

There are no planned or ongoing PMHA-directed evaluations of the demonstration for the overall MTW program or any specific MTW activities, with the exception of regular reviews of program data and reports by affiliated managers including Public Housing, Section 8, Finance, and Capital Funds.

PMHA chooses not to be evaluated under the Public Housing Assessment System (PHAS) and the Section 8 Management Assessment Program (SEMAP) until required to do so by the Department of Housing and Urban Development.

D. LOBBYING DISCLOSURES

N/A: No lobbying activities.

A signed copy of the Disclosure of Lobbying Activities (SF-LLL) and the related Certification of Payments to Influence Federal Transactions (form HUD-50071) are on the next page:

Certification of Payments to Influence Federal Transactions

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

OMB Approval No. 2577-0157 (Exp. 1/31/2027)

Public reporting burden for this information collection is estimated to average 30 minutes, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The information requested is required to obtain a benefit. This form is used to ensure federal funds are not used to influence members of Congress. There are no assurances of confidentiality. HUD may not conduct or sponsor, and an applicant is not required to respond to a collection of information unless it displays a currently valid OMB control number. Comments regarding the accuracy of this burden estimate and any suggestions for reducing this burden can be sent to the Reports Management Officer, Office of Policy Development and Research, REE, Department of Housing and Urban Development, 451 7th St SW, Room 4176, Washington, DC 20410-3000. When providing comments, please refer to OMB Approval No. 2577-0157.

Applicant Name

Portage Metropolitan Housing Authority

Program/Activity Receiving Federal Grant Funding

Moving to Work (MTW) Demonstration Program

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, Disclosure Form to Report Lobbying, in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all sub recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. **Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Authorized Official

Pamela Nation Calhoun

Title

Executive Director

Signature



Date (mm/dd/yyyy)

07/11/2024

Previous edition is obsolete

form HUD 50071 (01/14)

ADDITIONAL APPENDIX ITEMS

Significant Changes/Modifications to Activities: HUD requires MTW PHAs to re-propose activities that require "significant changes." A "significant change" occurs when the nature of the activity has changed such that an additional MTW authorization is needed OR when an MTW PHA fundamentally changes the nature and scope of an activity to the extent that there is the potential for a different impact on residents (e.g., changing the calculation of rent). In these cases, the activity must undergo a new public process. HUD reserves the right to determine on a case-by-case basis if the change made to an activity crosses this threshold and therefore requires the activity to be re-proposed.

Resident Commissioner: The City Manager of Kent, Ohio appoints the resident commissioner position. This position is vacant as of September 6th, 2024.

Non-Smoking Policy in Public Housing: PMHA designated all Public Housing properties as smoke free effective July 30, 2018, per HUD's Final Rule "Instituting Smoke-Free Public Housing" published on December 6, 2016 and HUD Notice PIH-2017-03 issued on February 15, 2017. In 2018, PMHA conducted resident meetings for input on the draft smoke-free policy and modified the draft policy based on resident input. PMHA issued the revised draft policy to all Public Housing residents for a 30-day comment period. The policy was implemented by the effective date of July 30, 2018. Under this policy, PMHA bans the use of all prohibited tobacco products in all PMHA owned and/or managed dwelling units, within all units, indoor common areas, administrative offices and buildings, and in outdoor areas within 25 feet of any PMHA housing or administrative offices, buildings, or structures along with outdoor common areas that include but are not limited to playgrounds, mailbox and dumpster areas, and school bus stops. PMHA offered residents information regarding and referrals to community organizations that provide smoking cessation services, as well as brought the Portage County Health District to one PMHA-owned building, the Opportunity Resource Center, to assist residents in preparation for smoke-free housing by providing a series of 5 tobacco cessation classes. PMHA will adopt any further non-smoking policies as required by law or HUD regulation.

Public Housing Over-Income Limit under the Housing Opportunity Through Modernization Act of 2016 (HOTMA) Policy in Public Housing: HOTMA was signed into law on July 29, 2016 (Public Law 114-201, 130 Stat. 782); section 103 of HOTMA amends section 16(a) of the United States Housing Act of 1937 (42 U.S.C. 1437n(a)) (1937 Act) and established income limitations for continued occupancy in Public Housing. The law requires that after a family's income has exceeded 120 percent of the area median income (AMI), or a different limitation as may be established by the Secretary, for two consecutive years, a PHA must terminate the family's tenancy within 6 months of the second income determination or charge the family a monthly rent equal to the greater of: (1) the applicable Fair Market Rent (FMR); or (2) the amount of monthly subsidy for the

unit, including amounts from the operating and capital fund, as determined by regulations. Section 103 of HOTMA requires PHAs to implement this over-income limit and, as such, PMHA has updated its Public Housing Admissions and Continued Occupancy Policies (ACOP) to implement these changes and to establish policies for continued occupancy in Public Housing. PMHA will update its over-income limits annually in the ACOP, as required by HOTMA, no later than 60 days after HUD publishes new income limits each year. PMHA will adopt any further income limitation policies as required by law or HUD regulation.

Violence Against Women Act Policies: PMHA is committed to assisting victims of domestic violence. PMHA's Section 8 Administrative Plan and Public Housing Admissions and Continued Occupancy Plan (ACOP) are written to protect victims of either gender from unfair evictions and program terminations due to the violence perpetuated against them. PMHA reviews police reports for Public Housing to identify the need to refer residents to counseling and other necessary domestic violence programs. PMHA also will pursue evictions against residents responsible for domestic violence. For the purposes of discussion here, these activities include victims of all criminal activity covered under the VAWA.

Affirmatively Furthering Fair Housing Policy in Section 8: It is a goal of the Portage Metropolitan Housing Authority (PMHA) to promote nondiscrimination and to provide fair and equal housing opportunities for all. To that end, PMHA undertakes extraordinary efforts to affirmatively further fair housing.

The PMHA's Section 8 Program is designed to achieve three major goals: (1) to provide decent, safe and sanitary housing for very low-income families while maintaining their rent payments at an affordable level; (2) to promote freedom of housing choice and spatial de-concentration of very low-income families of all races and ethnic backgrounds; and (3) to provide an incentive to private property owners to rent to very low-income families by offering timely assistance payments. In addition, PMHA strives to encourage self-sufficiency of assisted families.

In furtherance of its commitment to full compliance with applicable civil rights laws, the PMHA provides information to Section 8 program participants regarding discrimination and corrective actions that are available to them if they feel they have been victims of discrimination. This information is made available to participating families during the Section 8 Briefing Session. All applicable Fair Housing information and Discrimination Complaint forms are also provided to program participants at the time of the Section 8 Briefing Session.

The PMHA strives for objectivity and consistency in the application of eligibility guidelines governing the administration of the Section 8 program. PMHA staff reviews family information without regard to any factors other than the eligibility determinants set forth in the Section 8 Administrative Plan. Each family is provided with the opportunity to explain

their circumstances, to furnish additional supporting documents/information, and to receive an explanation of any decisions made by PMHA in connection with their application for housing assistance.

The ultimate goals of all of these actions are the elimination of impediments to fair housing, to remedy discrimination in housing, and to promote fair housing rights and fair housing choice.

PMHA will also take steps to affirmatively further fair housing in its Family Self-Sufficiency (FSS) program and will maintain records of those steps and their impacts. PMHA will: (1) advertise widely in the community for the coordinator position, (2) market the FSS program to all eligible persons, including persons with disabilities and person with limited English proficiency, (3) make buildings and communications that facilitate applications and service delivery accessible to persons with disabilities, (3) provide fair housing counseling services or referrals to fair housing agencies to program participants, (5) inform program participants of how to file a fair housing complaint, including providing the toll-free number for the Housing Discrimination Hotline, and (6) recruit landlords and service providers in areas that expand housing choice to program participants.

The City of Kent is the only community in Portage County that has a Consolidated Plan and thus, prepares an analysis of impediments to fair housing. According to Kent's Consolidated Plan, the impediments to affordable housing include high cost of rental housing fueled by competition from university students, lack of public transportation and prejudice towards minorities and special needs populations. PMHA works with the City of Kent and other local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require PMHA's involvement to affirmatively further fair housing.

The local fair housing advocacy agency, Fair Housing Contact Service, offers many services to landlords and tenants in order to educate them on fair housing laws. The PMHA, as a paying member of Fair Housing Contact Service, receives newsletters and brochures for distribution to Section 8 landlords and tenants. In the past, PMHA sponsored a workshop conducted by Fair Housing Contact Service aimed at educating Section 8 landlords. In addition, Fair Housing Contact Services completed a staff development session for employees of PMHA.

The steps above are in addition to the on-going administrative efforts followed in order to comply with civil rights laws. PMHA works with local partner agencies to assist families with accessing supportive services. The agency also provides assistance to voucher holders searching for units, approves higher rents for accessible units and provides assistance to owners regarding program access. Additionally, PMHA works to identify potential funds for accessibility.

PMHA routinely furthers fair housing by distributing fair housing materials and discrimination complaint forms at all briefing sessions and maintains a landlord discrimination complaint log. PMHA distributes information on how to file a fair housing

complaint and the toll-free number (1.800.669.9777) for the Housing Discrimination Hotline (and the Federal Information Relay Service, 1.800.887.8339) in the Section 8 Briefing packet. In addition, complaint forms and the hotline number are displayed in the PMHA lobby and are available at the front desk. In addition, PMHA completes ongoing reviews of its programs.

At least annually, staff prepares demographic reports of various components of the Section 8 program, in order to ensure the fair treatment of applicants and participants. PMHA maintains records of the analyses and actions relating to steps taking to affirmatively further fair housing requirements of 24 CFR Part 903.7(o).

Security Improvements Project (from 2021 Plan) – Update: PMHA took steps to improve upon security at our six (6) Public Housing family sites, which are Athena Gardens, Community Estates, Ravenna (Harvest) Woods, Heritage Knolls, Renaissance Place, and Townsquare Villas. The primary purpose of this project was to improve the safety, security, and monitoring at these sites. This project was first included in PMHA's approved 2021 MTW Annual Plan.

PMHA equipped each site with security cameras mounted to either buildings or light posts, to offer surveillance coverage for the protection of our sites and our residents. Each site also received necessary lighting upgrades to help with camera surveillance under night or low daylight conditions. Each site has multiple cameras, with either wired or wireless connection, connected to a central digital video recorder (DVR) located in either a locked property garage or locked community space office. Each DVR is accessible remotely and viewable by select PMHA staff as a way to monitor site activity. This serves as a resource if an incident occurs, and footage is needed by PMHA to enforce a lease or by law enforcement. In addition to the lighting upgrades and security camera system installation, the units at each site, except for Ravenna (Harvest) Woods, are receiving new front and rear exterior entry doors and code-compliant lever hardware to ensure the safety of every resident and of PMHA's properties. The replacement doors and hardware at Ravenna (Harvest) Woods were already incorporated into a separate project under the Capital Funds grant.

Security camera installation was completed at all sites as of April 29, 2024. The Renaissance Place exterior door project is currently underway as of the writing of this Plan, and this project at all sites in ongoing.

This project was solely funded by HUD-held reserves and did not utilize current HAP funds.

Athena Gardens & Renaissance Place HVAC Project (from 2022 Plan) – Update: Upon approval of PMHA's 2022 MTW Annual Plan, PMHA commenced an HVAC project at two (2) Public Housing family sites, Athena Gardens and Renaissance Place. The primary purpose of this project was to replace the aging furnace systems at these sites as well as provide central air conditioning, which was not previously present at either site.

This project was solely funded by HUD held reserves and does not utilize current HAP funds.

It was anticipated that PMHA would utilize approximately \$300,000 of reserves for the project at the two (2) sites. The actual cost for installation at Athena Gardens was \$138,528 and the actual cost for installation was \$161,472 for Renaissance. This included removing and disposing of existing forced air furnaces and replacing them with new, energy-efficient furnaces and installing condenser units for central air conditioning.

The HVAC replacement at Athena Gardens was completed on August 16, 2022. The HVAC replacement at Renaissance Place was completed on April 13, 2023.

Planned Uses of HUD-Held Reserves – Projects from 2023 Plan – Update:

Eastowne Manor & Etna House

1. Full Modernization of Eastowne & Etna Elevators- Both the Eastowne Manor and Etna House elevators are in need of replacement. The modernization would allow PMHA to keep the elevators running safely, reliably and in an energy-efficient manner. Completion of the project will require temporary displacement of residents. The estimate for the replacement of the elevators at both properties is approximately \$293,500. The buildings' machine rooms, elevator shafts, and pits all must be brought up to existing code requirements whenever the controller is replaced. PMHA also intends to add generators into the scope of work, so that if there is a power outage, the elevators will not cease to function. While generators aren't inherently tied to the elevator project, if we added the generators separately, work would need to be redone to have the contractor add the elevators to them, therefore PMHA intends combine the generators into the elevator project to be done together. The cost associated is not included in the budget estimates. As of the writing of this Plan, PMHA was utilizing architects and engineers who are currently working on this project, and it is estimated that the project will take approximately a year to plan.
2. Roof Replacement- The Etna House roof replacement was completed on June 7, 2023. The Eastowne Manor roof replacement was completed on July 13, 2023.
3. Intercom & Door System Replacement- The Etna House system replacement was completed on November 10, 2022. The Eastowne Manor system replacement was completed on March 11, 2024.
4. Community Room, Computer Lab and Lobby Upgrade- The community spaces are essential to the socialization of the elderly and disabled residents of these properties. The spaces are used as gathering rooms, the venue for social events, and recreational activities. Service providers also use the space to host events pertaining to the health and welfare of residents. The community room upgrades included the replacement of tables, chairs, flooring, window coverings, and

upgrades to the kitchenettes. Computer Lab upgrades included new flooring, the installation of new computer workstations, and the removal of existing plumbing and cabinetry. The lobby upgrades included the purchase of replacement furniture and accessories. All spaces received new painting/wallpaper. The project was completed at Etna House on February 15, 2024. The project was completed at Eastowne Manor on March 25, 2024.

Etna House

1. Installation of air conditioning- The property is occupied by elderly and disabled residents, many of whom require air conditioning due to chronic health conditions. Unlike the other elderly/disabled property in PMHA's Public Housing inventory, the units at Etna House do not have air conditioning. As of the writing of this Plan, this project was going out to bid by the end of June 2024.

Eastowne Manor

1. Upgrade of office space- Eastowne Manor contains office space that was previously unused. The space was upgraded to serve as a satellite office to be used by PMHA staff and community partners who provide services to the elderly and disabled residents at the property. The upgrade included the purchase of office furniture, electronics (computer, printer, phone, etc.) and other items needed to bring the space online as a usable office. This project was completed on March 25, 2024.

Scattered Sites

1. Installation of new HVAC systems- PMHA will install new HVAC systems, including energy efficient furnaces and central air at the thirty-seven (37) scattered single-family homes and duplexes that are part of PMHA's Public Housing portfolio. As of the writing of this Plan, units on the following streets were completed in May 2024: Blake, Jefferson, Portage, Lafayette, and Scranton. As of the writing of this Plan, units on the following streets were scheduled for completion as follows: Fourth (June 19, 2024), Walton (June 21, 2024), Henderson (June 25, 2024), Sumner (June 27, 2024), Skeels (July 1, 2024).

PHA-Wide Appliance Replacement

1. Replacements- Stoves, refrigerators, and rangehoods at all Public Housing properties will be replaced with energy efficient appliances. As of the writing of this Plan, appliance replacement at Renaissance Place is currently in progress and is scheduled to be completed by approximately November 2024. After Renaissance Place is completed, PMHA plans to update appliances by site until all are replaced.

Planned Uses of HUD-Held Reserves – Project from 2024 Plan – Update:

1. Playground Upgrades at All Public Housing Family Sites- PMHA will upgrade all playground surfaces and equipment at all six (6) sites that have playgrounds. As of the writing of this Plan, the architect was working on specs and a bid packet for this project.
2. Window Replacement at Etna House- PMHA will replace all resident unit windows, as well as the windows on the 4th floor community room. As of the writing of this Plan, the architect was working on specs and a bid packet for this project.
3. Pavilions at all Public Housing Sites- PMHA will install a pavilion at all sites to give residents an outdoor space to gather for events. As of the writing of this Plan, the architect was working on specs and a bid packet for this project.
4. Interior & Exterior Upgrades for Public Housing Scattered Sites- PMHA will renovate the interiors and exteriors of the Public Housing scattered sites that have not been upgraded. As of the writing of this Plan, units at Jefferson and Fourth are currently under contract for renovation.
5. Acquisition of Two (2) Units to Replace Willow Street Public Housing Units- PMHA will utilize HUD-held reserves to supplement the proceeds from the sale of the Willow Street Public Housing units to develop two (2) replacement Public Housing units and help cover any costs associated with the project.

Planned Uses of HUD-Held Reserves in 2025: PMHA plans to use its HUD-held Reserves for the projects described below.

1. Development of Up to Five (5) Housing Units- PMHA proposes to develop up to five (5) units of affordable housing starting in 2025. HUD-held reserves will be used to cover all construction and administrative costs associated with the development of the five units. The units will be market rent units available for lease to both Housing Choice Voucher program participants and unassisted renters.
2. Public Housing Summer Camps- PMHA proposes to operate summer camps for youth ages 5-14 at each of PMHA's six (6) family sites utilizing HUD-held reserves to cover all administrative and operating costs associated with the camp.
3. Public Housing Summer Camp Staffing- PMHA proposes to employ at least six (6) Social Service Coordinators to work at each of PMHA's six (6) Public Housing family sites, to implement and operate summer camps for resident youth. Presently, PMHA is operating four (4) youth summer camps utilizing one-time grant funds, and we want to expand the program. Staff salary and benefits would be paid utilizing HUD-held reserves.

4. PHA-Wide Parking Lot, Driveway, and Sidewalk Repair/Replacement- PMHA proposes to utilize HUD-held reserves to cover the repair/replacement of parking lots, driveways, and sidewalks at all Public Housing sites.
5. Improvements to the Opportunity Resource Center (ORC)- PMHA plans to make improvements to the ORC. The ORC is an agency-owned community center located centrally to PMHA's eastside properties including family sites (Community Estates, Ravenna Woods, Renaissance Place), senior/disabled properties (Eastowne Manor and Etna House), and sixteen additional scattered properties. PMHA currently partners with the Maplewood Career Center ASPIRE program which provides adult education including GED preparation and test administration, and other trainings that provide students with educational skills needed to help them secure employment. PMHA plans to continue the partnership with the ASPIRE program and expand the use of the property to include serving as a venue for future resident services activities, trainings, and events for both Public Housing residents and Housing Choice Voucher program participants. Upgrades will include, but are not limited to, exterior (doors, siding, gutters, downspouts, lighting, parking lot maintenance, etc.) and interior (upgrade existing restrooms to ADA compliant restrooms, flooring, lighting, wall repair and painting, replacement of existing doors, kitchenette, new furnishings) improvements.

Capital Fund Program – The Annual Statement/Performance and Evaluation Report (HUD 50075.1) or subsequent form required by HUD: In lieu of HUD 50075.1, PMHA chooses to include its Capital Fund Program Five-Year Action Plan (HUD 50075.2). Historically, PMHA was permitted under MTW to either submit the 50075.1 or the 50075.2. PMHA has submitted the 50075.2 because it gives the agency the flexibility of a rolling 5 Year Action Plan. However, a 50075.1 is always submitted annually in the spring to the HUD Field Office, based off the information in the 50075.2 that was submitted with the Annual MTW Plan the previous fall. PMHA's concern is that submitting the 50075.1 will limit the agency's flexibility as to what we will be able to do until next year's Annual MTW Plan submission. Submitting the 50075.2 (5 Year Plan) gives flexibility to make changes within the coming year's annual plan submittal if we see the need. For clarity, PMHA can list 20 potential projects in the 50075.2 for its 5 Year Plan, and when the agency submits the 50075.1 the following spring, we can pick from the 20 based on the agency's greatest needs. It is PMHA's understanding that MTW agencies are allowed this flexibility.

Capital Fund Program – Five Year Action Plan

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						
Portage Metropolitan Housing Authority - OH31		City of Kent - 44240, City of Ravenna - 44266 and Portage County, Ohio		<input checked="" type="checkbox"/> Original 5-Year Plan		___ Revision No:
A.	Development Number and Name	Work Statement for Year 1 FFY: 2024	Work Statement for Year 2 FFY: 2025	Work Statement for Year 3 FFY: 2026	Work Statement for Year 4 FFY: 2027	Work Statement for Year 5 FFY: 2028
B.	Physical Improvements Subtotal	Annual Statement	\$ 714,928.40	\$ 714,928.40	\$ 714,928.40	\$ 714,928.40
C.	Management Improvements			-	-	-
D.	PHA-Wide Non-dwelling Structures and Equipment			0.00	0.00	0.00
E.	Administration		94,750.80	94,750.80	94,750.80	94,750.80
F.	Other		60,000.00	60,000.00	60,000.00	60,000.00
G.	MTW Demonstration		-			
H.	Operating		94,750.80	94,750.80	94,750.80	94,750.80
I.	Development		0.00	0.00	0.00	0.00
J.	Capital Fund Financing- Debt Service		0.00	0.00	0.00	0.00
K.	Total CFP Funds		\$ 964,430.00	\$ 964,430.00	\$ 964,430.00	\$ 964,430.00
L.	Total Non-CFP Funds		0.00	0.00	0.00	0.00
M.	Grand Total		\$ 964,430.00	\$ 964,430.00	\$ 964,430.00	\$ 964,430.00

(4/2008)
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form HUD-50075.2

Capital Fund Program - Five -Year Action Plan

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Part II: Supporting Pages - Physical Needs Work Statement(s)

Work Statement for Year 1 FFY 2024	Work Statement for Year: 2 FFY: 2025			Work Statement for Year: 2 FFY: 2025		
	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	OH31000001 - EAST AMP			OH31000001 -WEST AMP		
Annual Statement	Renaissance Vanities, Toilets	All	114,877.65	Athena Gardens Interior Upgrade	All	106,412.00
	Tubs/Surrounds			Heritage Knolls Roofs	All	77,348.75
	PHA Wide Pavilion(s)		20,000.00			
	Scattered Sites Central Air	All	100,000.00			
				Scattered Site	All	
	Ravenna Woods Exterior Entry Doors		86,448.40	Interior/Exterior upgrade		80,000.00
	Ravenna Woods Interior Blinds		10,000.00	PHA Wide Pavilion(s)		36,922.00
	Comm Estates Interior Doors		27,510.00			
	Comm Estates Office Addition		40,000.00			
	Community Estates Splash Pad		15,409.60			
	Subtotal of Estimated Costs		\$ 414,245.65	Subtotal of Estimated Costs		\$ 300,682.75

Capital Fund Program - Five -Year Action Plan

U.S. Department of Housing and Urban Development
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Part II: Supporting Pages - Physical Needs Work Statement(s)

Work Statement for Year 1 FFY 2024	Work Statement for Year: 3 FFY: 2026			Work Statement for Year: 3 FFY: 2026		
	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost
	OH31000001 - EAST AMP			OH31000002 - WEST AMP		
Annual Statement	Interior Doors PHA Wide	All	55,566.75	Town Square Parking Lot		66,922.00
	Harvest Drive Flooring upgrade	All	56,207.20	Scattered Site Central Air		46,500.00
	PHA Wide Driveway/ParkingLot/Walks	All	60,000.00	Townsquare Cabinets/Countertop		57,426.65
				Bath Vanities and fixtures		
	Etna Elevator Repair/Replacement		50,000.00			
	Etna Window Replacement		5,000.00			
	Comm. Est. Bath Vanities and fixtures		36,000.00	Townsquare Plygrnd/Spray Pool		10,000.00
	Ravenna Woods Site-Wide Internet		15,000.00	514 Harris Int and Ext Renovation		30,000.00
	Ravenna Woods Splash Pad		15,409.60	Town Square Site Lighting		32,302.80
	Renaissance					
	Siding/gutters/downspts/storm doors		92,145.00	220-228 W Elm Exterior Upgrade		86,448.40
	Entry Doors, brick repair					
	Subtotal of Estimated Costs		\$ 385,328.55	Subtotal of Estimated Costs		\$ 329,599.85

Capital Fund Program - Five -Year Action Plan

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
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Part II: Supporting Pages - Physical Needs Work Statement(s)

Work Statement for Year 1 FFY 2024	Work Statement for Year: 4 FFY: 2027			Work Statement for Year: 4 FFY: 2027		
	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost
Annual Statement	OH31000001 - EAST AMP			OH31000002 - WEST AMP		
		All		Security Cameras Walter Street		14,223.12
	Scattered Interior/Exterior Renovation	All	106,215.23	Security Cameras Town Square		15,224.84
	Generator Eastowne and Etna		46,922.00			
				Town Square Office Addition		86,448.40
	Secur. Cameras Community Estates		24,154.22	PHA Wide Appliance Upgrade		15,409.60
	Renaissance Site-Wide Internet		27,451.00	Security Cameras Athena Gardens		15,000.00
	Eastowne Elevator Replacement		55,207.20	Athena Gardens Plygrnd/Spray Pool		15,000.00
	Appliance Upgrade		29,553.00	Athena Gardens Site-Wide Internet		62,302.80
	Eastowne Intercom System		20,000.00			
	4325-4327 Marks Ave Septic Upgrade		54,295.75	PHA Interior Doors		127,521.24
	Interior Upgrade					
	Subtotal of Estimated Costs		\$ 363,798.40	Subtotal of Estimated Costs		\$ 351,130.00

Capital Fund Program - Five -Year Action Plan

U.S. Department of Housing and Urban Development
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Part II: Supporting Pages - Physical Needs Work Statement(s)

Work Statement for Year 1 FFY 2024	Work Statement for Year: 5 FFY: 2028			Work Statement for Year: 5 FFY: 2028		
	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost
Annual	OH31000001 - EAST AMP			OH31000002 - WEST AMP		
Statement	Renaissance Comm. Space Upgrade		32,214.56	Heritage Knolls Community Space		27629.52
	Security Cameras Ravenna Woods		20,000.00	Heritage Knolls Storm/Entry Doors		25,207.20
	Ravenna Woods plygrnd/Spray Pool		13,768.00	Athena Office Addition		52,302.80
	4333-4339 Marks Ave Septic Rplcmt		54,295.75			
	Interior upgrade			Heritage Knolls Plygrnd/Spray Pool		30,409.60
	Ravenna Woods Office Addition		86,448.40	Heritage Knolls Site Lighting		20,000.00
	Etna Central Air		91,922.00	Heritage Knolls Cabinets/Counters/ Shower/surround, toilets, vanities		94,498.57
	Community Estates Cabinets/ Countertops		101,232.00	Heritage Knolls Site-Wide Internet		50,000.00
	Renaissance Plygrnd/Spray Pool		15,000.00			
	Subtotal of Estimated Costs		\$ 414,880.71	Subtotal of Estimated Costs		\$ 300,047.69

Capital Fund Program - Five -Year Action Plan

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

Part III: Supporting Pages - Management Needs Work Statement(s)

Work Statement for Year 1 FFY 2024	Work Statement for Year: 3 FFY: 2027		Work Statement for Year: 3 FFY: 2027	
	Development Number/Name General Description of Major Work Categories	Estimated Cost	Development Number/Name General Description of Major Work Categories	Estimated Cost
Annual Statement	OH31000001 - EAST AMP		OH31000002 - WEST AMP	
	Fees & Costs- Advertising Bids & Architect Fee	39,500.00	Fees & Costs- Advertising Bids & Architect Fee	20,500.00
	Administration- CFP Management Fee	66,325.56	Administration- CFP Management Fee	28,425.24
	Operations	66,325.56	Operations	28,425.24
	Subtotal of Estimated Costs	\$ 172,151.12	Subtotal of Estimated Costs	\$ 77,350.48

Capital Fund Program - Five -Year Action Plan

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Part III: Supporting Pages - Management Needs Work Statement(s)

Work Statement for Year 1 FFY 2024 Annual Statement	Work Statement for Year: 4 FFY: 2028		Work Statement for Year: 4 FFY: 2028	
	Development Number/Name General Description of Major Work Categories	Estimated Cost	Development Number/Name General Description of Major Work Categories	Estimated Cost
	OH31000001 - EAST AMP		OH31000002 - WEST AMP	
	Fees & Costs- Advertising Bids & Architect Fee	39,500.00	Fees & Costs- Advertising Bids & Architect Fee	20,500.00
	Administration- CFP Management Fee	66,325.56	Administration- CFP Management Fee	28,425.24
	MTW Demonstration	66,325.56	MTW Demonstration	28,425.24
	Subtotal of Estimated Costs	\$ 172,151.12	Subtotal of Estimated Costs	\$ 77,350.48

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 2024	Work Statement for Year: 5 FFY: 2027		Work Statement for Year: 5 FFY: 2027	
	Development Number/Name General Description of Major Work Categories	Estimated Cost	Development Number/Name General Description of Major Work Categories	Estimated Cost
Annual Statement	OH31000001 - EAST AMP		OH31000002 - WEST AMP	
	Fees & Costs- Advertising Bids & Architect Fee	39,500.00	Fees & Costs- Advertising Bids & Architect Fee	20,500.00
	Administration- CFP Management Fee	66,325.56	Administration- CFP Management Fee	28,425.24
	Operating	66,325.56	Operating	28,425.24
			Site Acquisition	1,000.00
	Subtotal of Estimated Costs	\$ 172,151.12	Subtotal of Estimated Costs	\$ 78,350.48