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Portage Metropolitan Housing Authority

Moving to Work 2027 Annual Plan

Submission Date: October ___, 2026

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.

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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 163,839 persons, of which 88.8% are White, 5.5% are Black, 2.8% are Asian, 0.2% are American Indian and Alaska Native, 0.1% are Native Hawaiian and Other Pacific Islander, and 2.5% are two or more races. Of this population, 2.4% are Hispanic or Latino.

According to the United States Census Bureau QuickFacts statistics as of July 1, 2025, 11.7% of Portage County persons live in poverty. The comparable past poverty rates were 12.5% based on 2020 data, 9.9% based on 2021 data, 12.4% based on 2022 data, 12.4% based on 2023 data, and 12.9% based on 2024 data.

Based on Ohio Department of Job and Family Services Office of Workforce Development data for March 2026, the Unemployment Rate for Ohio was 4.0% and, for Portage County, it was also 4.0%.

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 are:

<u>City</u>	<u>Population</u>
Kent City	27,116
Streetsboro City	17,661
Aurora City	17,581
Brimfield Township	11,413
Ravenna City	11,274
Ravenna Township	9,076

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 over 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. In December 2024, Congress extended the MTW Demonstration for the initial 39 MTW PHAs through 2038.

Throughout its 58-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:

[REDACTED], Board Chairperson
Jean Meadows, Board Vice-Chairperson
Shynice Steward, Resident Commissioner
Scott Mikula, Commissioner
John Thomas, Commissioner

Executive Director:

Pamela Nation Calhoun

Executive Leadership Team:

Amy Bower, Assistant Director
Mariah Blake, Finance Manager
Carolyn Budd, Special Programs Manager
Corrina Helton, Housing Portfolio Manager
Mary Jones, Section 8 Manager
Lee Lovejoy, Project Manager
Donald Paulat, Asset Maintenance 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 2027:

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 Bdm	1 Bdm	2 Bdm	3 Bdm	4 Bdm	5+ Bdm	TOTAL UNITS	POPULATION TYPE**	Section 504 Accessible Units* (Mobility)	Section 504 Units* (Hearing / Vision)
East Side OH031000001	0	0	2	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 or HAP 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, changes to designated housing plans and/or accessibility features of developments or units, etc.

PLANNED OTHER CHANGES TO MTW HOUSING STOCK ANTICIPATED IN THE PLAN YEAR
PMHA is still exploring the possibility of using 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. The initial due diligence phase (site planning, work by architect and engineer, approval of the plans, etc.) has been completed. PMHA has a cost estimate but, given the current climate we are operating in and our HUD-held reserve level being diminished, PMHA has not yet moved forward. Additional analysis of the fiscal impact and funding sources is needed. PMHA plans to revisit this and have a work plan later in 2026 or in 2027.

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
East Amp1-OH031000001: Ravenna Woods Vanities, Toilets, Tubs/Surrounds - \$118,317.20 Ravenna Woods Exterior Doors - \$92,448.00 Community Estates Interior Doors - \$34,073.16 Community Estates Vanities, Toilets, Tubs/Surrounds - \$125,000.00 Etna Kitchens - \$182,752.08 West Amp2-OH031000002: Athena Gardens Interior Upgrades - \$106,412.00 Heritage Knolls Toilets, Tubs/Surrounds - \$103,320.00 Scattered Sites Interior Upgrades - \$65,666.16

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**
Public Housing Units Leased	3636	303
Housing Choice Vouchers (HCV) Utilized***	23,592	1966
Local, Non-Traditional: Tenant-Based^	0	0
Local, Non-Traditional: Property-Based^	0	0
Local, Non-Traditional: Homeownership^	0	0
Planned Total Households Served:	27,228	2,269

* "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.

*** "Housing Choice Vouchers (HCV) Utilized" includes all SPVs within the MTW PHA's portfolio.

^ 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 housing programs listed.

HOUSING PROGRAM	DESCRIPTION OF ANTICIPATED LEASING ISSUES AND POSSIBLE SOLUTIONS
Public Housing	In order to continually improve leasing times, Public Housing has and will continue to: 1. Work diligently with the Applications Department to create processes that can improve and expedite the number of qualified applicants that are genuinely interested in Public Housing. 2. Begin and build the relationship with each processed applicant as soon as the file is turned over by the Applications Department, to better educate and prepare the applicant for a unit offer and for move-in. 3. Decrease the time given to applicants that need to wait for availability of funds. 4. Offer security deposit payment agreements with up to 4 monthly payments for deposits less than \$300 (minimum monthly payments of \$50) and up to 6 monthly payments for deposits of \$300 or more.
Housing Choice Voucher	Due to rent inflation and tightened federal appropriations causing widespread budget shortfalls for PHAs, PMHA has frozen the issuance of new vouchers and is limiting leasing to avoid overspending HAP allocations.
Local, Non-Traditional	N/A

iii. **Unique Households Served (Optional)**

Number of unique households served annually through local, non-traditional rental services program such as short-term rental assistance, rapid rehousing, emergency housing, etc.

UNIQUE HOUSEHOLDS SERVED
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 (indicating whether the waiting list is site-based or agency-wide for public housing) 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 Waiting List	Voucher waiting list for Section 8 and Mainstream programs Waiting List Preferences: A. Types of Applicants With Preference Over "Other Singles" - Elderly, disabled and displaced families with up to two members will be given a selection priority over all "Other Single" applicants regardless of preference status. "Other Singles" denotes a one-person household in which the individual member is neither elderly nor disabled. Such applicants will be placed on the waiting list in accordance with their date and time of application but cannot be selected for assistance before any elderly single, disabled single, or displaced single regardless of any preferences. B. Local Preferences 1. Public Housing Transfer- Public Housing residents who wish to transfer to the Section 8 program for the following reasons: to relocate closer to their employment if employment is five (5) or more miles from the unit the resident currently resides in; to enable large families who are under housed to seek housing with more bedrooms than are available at their public housing development; to enable families who become over housed, including sole remaining family members, the opportunity to move into more suitable housing; to accommodate families who are eligible and desire to participate in a homeownership program sponsored by Neighborhood Development Program or by the PMHA. 2. Military Service- This preference is available to applicants where the head of household, spouse or co-head is a veteran or survivor of a veteran (honorably discharged) who actively served in a branch of the United States Armed Services or an active member of a branch of the United States Armed Services. The term survivor includes the spouse or widow of a veteran (unless remarried). A person who served in the military that was dishonorably discharged is not eligible for the veteran's preference. 3. Re-Entry Initiative Referral- This preference is available to applicants who are referred from the Portage County Adult Probation office. Once a referral is received by PMHA, staff will Target Select the applicant from the Section 8 waiting list. 4. Landlord Referral- This preference is available to individuals and families referred by their current landlord due to financial hardship, which have detrimentally impacted the household's ability to pay rent. Each participating landlord will be eligible for referrals as outlined here: owners are eligible to submit up to four (4) referrals per year; owners of fifty (50) or more units are eligible to submit referrals for no more than ten percent (10%) of their housing portfolio, not to exceed	2942	Closed	Projected to remain closed

	twelve (12) referrals, per year; all other Section 8 waiting list households would be ranked by order of date of application. 5. Emergency Housing Voucher (EHV) preference- This preference is available to current EHV participants whose assistance is at risk of termination due to lack of program funding. This preference allows the eligible family to transfer to either the Housing Choice Voucher program (HCV) or the Mainstream Voucher program if all eligibility requirements are met.			
Public Housing Waiting List	Agency-wide waiting list for Public Housing units Preference and Placement: A. Applicants will be given a Military Service preference, if qualified, and will be selected above all other applicants on the list B. Elderly applicant households will have top priority for units designed for the elderly. The preference hierarchy for such units shall be as follows: 1. Elderly applicants with local preference(s)- 62 & older 2. Near-elderly applicants- 55 and older 3. Non-elderly applicants- 50 and older C. Accessible or Adaptable Units - For units accessible or adaptable for persons with disabilities, households with at least one person with a disability will have first priority (as applicable for a particular unit's feature) D. Supportive Services Placement 1. Services for physically disabled persons are offered at 1683 Athena Drive by Independence Inc., and the Portage County Board of Development Disabilities 2. Services for mentally disabled (to assist them to become independent) are offered at Walnut House by Coleman Professional Services - Housed individuals at the above facilities are usually referrals by the specific service agency. However, this does not preclude applicants from the waiting list from being considered for these units.	4183	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)	70	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 waiting list and the Public Housing 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 waiting lists

SECTION III: PROPOSED MTW ACTIVITIES

There are no proposed MTW activities for 2027. PMHA plans to evaluate the effectiveness of current activities during the coming program year and revise as needed.

SECTION IV: APPROVED MTW ACTIVITIES

A. IMPLEMENTED ACTIVITIES

HOUSING CHOICE VOUCHER PROGRAM

HCV-1 Restrict Portability Moves Out of Portage County

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.

Applicability of This Activity to Special Purpose Vouchers (SPVs):

- Already applied to the following SPVs – FYI and Mainstream
- Seeking to apply to the following SPVs – N/A

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, 2025

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 in resolving issues with bank/mortgage companies seeking foreclosure and to include homeownership assistance payments.

This activity was amended again in 2025 and implemented effective February 2025. PMHA added a monetary incentive for homeownership program participants. A \$1,000 payment is made to new homeownership program participants to assist with the cost of items needed prior to occupying their new home (e.g., appliances, lawncare equipment, furniture, etc.). The payment is issued to the participant the month that the initial subsidy payment is made. Existing homeownership program participants are 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.).

Applicability of This Activity to Special Purpose Vouchers: N/A

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

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 the opportunity 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.

Applicability of This Activity to Special Purpose Vouchers (SPVs):

- Already applied to the following SPVs – FYI, EHV, Mainstream, and VASH
- Seeking to apply to the following SPVs – N/A

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

HCV-4 Project-Based Voucher Program to Assist Nonprofits 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.

Applicability of This Activity to Special Purpose Vouchers: N/A

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 Section D. Closed-Out Activities

HCV-8 Transitional Housing Vouchers

Plan Year Approved: 2012

Implemented: 2012

Amended: N/A

Closed Out: 2017 - Refer to Section 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.

Applicability of This Activity to Special Purpose Vouchers (SPVs):

- Already applied to the following SPVs – FYI, EHV, Mainstream, and VASH
- Seeking to apply to the following SPVs – N/A

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

Closed Out: 2026 - Refer to Section D. Closed Out Activities

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.

Applicability of This Activity to Special Purpose Vouchers (SPVs):

- Already applied to the following SPVs – FYI, EHV, Mainstream, and VASH

- Seeking to apply to the following SPVs – N/A

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

Amended: N/A

Refer to Section 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.

Applicability of This Activity to Special Purpose Vouchers: N/A

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, 2025

Description/Update: In 2019, this activity was proposed as “Incentive for New Landlords”; however, it was found that this incentive was not adequate and thus the activity underperformed. This activity was amended and repropose in 2022 and again in 2025 to more adequately meet the goals of the activity.

PMHA currently offers five (5) incentives; however, in October 2025, PMHA temporarily suspended all five (5) landlord incentives as an agency cost-saving measure. As of the writing of this Plan, it has not been determined if the temporary suspension will be lifted in 2026 or if this activity will need to be placed on hold.

The incentives are as follows:

1. **New Landlord Incentive-** PMHA offers a one-time incentive HAP payment of \$500 to new landlords, upon the execution of a new HAP contract for an MTW tenant-based HCV participant. The new landlord incentive payment is temporarily reduced from \$1,000 to \$500 as a cost savings measure. A “new landlord” is defined as a landlord who has not rented to a tenant-based voucher participant within the past twelve (12) months. The landlord is not eligible for the \$500 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 properties owned or managed by PMHA or any other PHA are ineligible for this incentive.
2. **Existing Landlords Incentive-** PMHA offers 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” is defined as a landlord who has rented to a tenant-based voucher participant at any time within the past twelve (12) months. The landlord is not 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 are ineligible for this incentive HAP payment. The existing landlord incentive is temporarily suspended as a cost savings measure.
3. **Rent Affordability Incentive-** PMHA offers 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” is defined as an initial rent burden of no more than 50% of the household’s monthly income. The rent affordability payment is 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. The rent affordability payment would be equal to the lesser of \$1,000 or the amount the proposed monthly rent is reduced by, to make it affordable and allow the voucher holder to qualify, multiplied by 12. For example, if the monthly rent is reduced by \$10 to meet the 50% initial rent burden cap, the rent affordability payment would be \$120. If the rent is reduced by \$100 to meet the 50% initial rent burden cap, the rent affordability payment would be \$1,000. The rent affordability incentive applies to newly admitted voucher holders as well as those who are moving with continued assistance. The monetary cap will be reviewed after one (1) year to determine if it addresses the concerns outlined above.

4. **Limited Damage Claim Incentive-** PMHA offers 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 is verified by a special inspection conducted by a PMHA HQS inspector. The special inspection is required to be conducted within 30 calendar days of the MTW tenant-based HCV participant's move-out date.
5. **Landlord Referral Bonus Incentive-** PMHA offers a \$100 incentive payment 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 \$500 per landlord in a calendar year.

Applicability of This Activity to Special Purpose Vouchers (SPVs):

- Already applied to the following SPVs – FYI, EHV, Mainstream, and VASH
- Seeking to apply to the following SPVs – N/A

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

Implemented: N/A

Amended: N/A

Refer to Section B. Not Yet Implemented Activities

HCV-18 Payment Standards at 120% of the FMR

Plan Year Approved: 2025

Implemented: N/A

Amended: N/A

Closed Out: 2026 - Refer to Section D. Closed Out Activities

PUBLIC HOUSING PROGRAM

PH-1 Escalating Minimum Rent

Plan Year Approved: 2008

Implemented: 2008

Amended: N/A

Closed Out: 2011 - Refer to Section 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. These new maximum rent amounts represented 75% of the 2024 Fair Market Rents (FMRs) for the Akron, Ohio Metropolitan Statistical Area.

On an annual basis, PMHA reviews FMRs and adjusts the maximum rent amounts as warranted by changes in the FMRs. The adjusted maximum rent amounts will be based upon 75% of the HUD FMRs for that year, and maximum rent increases will be effective January 1st of every year. Current maximum rents, as of the writing of this plan, are \$739 per month for a 1-bedroom unit, \$951 per month for a 2-bedroom unit, \$1160 per month for a 3-bedroom unit, and \$1261 per month for a 4-bedroom unit.

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 Recertifications Biennially

Plan Year Approved: 2000

Implemented: 2000

Amended: N/A

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

PH-4 Change in Employment Income

Plan Year Approved: 2008

Implemented: 2012

Amended: N/A

Description/Update: Change in employment income resulting in an increase in annual income of *any amount* is not processed until the next annual re-certification. However, residents are expected to report changes.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

PH-5 Rent Adjustment for Income Decreases

Plan Year Approved: 2009

Implemented: 2009

Amended: N/A

Description/Update: Decreases in income of less than \$1,000, or lasting less than 30 days, will not be processed until the next annual re-certification.

This rent reform activity is seldom used. However, whenever a household experiences an income decrease less than \$1,000, the time to process the decrease is costly to the PMHA and has minimal impact on the household when the income decrease lasts less than 30 days. On many occasions, households locate new employment or other sources of income within 30 days. Thus, the PMHA views this activity as being effective as a cost-savings feature. This activity does not give incentives to households to achieve self-sufficiency.

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

PH-6 Overall Percentage of Income Amounts for Rent Calculations

Plan Year Approved: 2012

Implemented: 2012

Amended: N/A

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

PH-7 Eliminate Allowance for Non-Reimbursed Childcare Expenses 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 Section 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 Section D. Closed-Out Activities

PH-9 Providing Transitional Housing

Plan Year Approved: 1999

Implemented: 1999

Amended: N/A

Closed Out: 2012 - Refer to Section 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 Health Services (CHS). CHS 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 Axess Family Services (AFS) to lease the building for the purposes of providing housing and services to men who are addressing alcohol and drug addiction issues. AFS provides residents with comprehensive services to facilitate a successful transition back to community living. This project was finalized in 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.

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 Section D. Closed out Activities

PH-12 Cap on Dependent Child Deduction

Plan Year Approved: 1999

Implemented: 2000

Amended: 2014

Closed Out: 2018 - Refer to Section 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 Section 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, 2025

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. This activity was amended again in 2025 to further promote the accumulation of assets. PMHA excludes income from all types of assets, whether they are actual or imputed. PMHA did, however, implement the HOTMA Asset Limitations rule at admissions to determine eligibility. This amendment was implemented in July 2025.

Applicability of This Activity to Special Purpose Vouchers (SPVs):

- Already applied to the following SPVs – FYI, EHV, Mainstream, and VASH
- Seeking to apply to the following SPVs – N/A

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

B-2 Cap on Dependent Child Deduction

Plan Year Approved: 1999

Implemented: 2000

Amended: N/A

Closed Out: 2014 (HCV), 2018 (Public Housing) - Refer to Section 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 payments (URP) for households who owe PMHA money, to be used to repay those debts. Once the tenant account is returned to zero balance, the URP will resume. If a tenant has not signed a debt repayment agreement with PMHA, the entire URP is withheld. If a tenant has signed a debt repayment agreement, PMHA withholds only the monthly repayment amount due. Discretion for hardship is given to lower monthly debt repayment amounts, and thus lower the withheld URP, in cases where tenants present a financial hardship.

Applicability of This Activity to Special Purpose Vouchers (SPVs):

- Already applied to the following SPVs – FYI and Mainstream
- Seeking to apply to the following SPVs – N/A

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

B-4 Proration of the Utility Allowance Schedule Up to the Percentage of Proration of Funding as Established by HUD Due to Appropriation

Plan Year Approved: 2009

Implemented: 2014 (Public Housing Program only)

Amended: N/A

Closed Out: 2026 - Refer to Section D. Closed out Activities

B-5 Single Fund Budget Flexibility

Plan Year Approved: 2009

Implemented: 2013

Amended: N/A

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

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 - Refer to Section 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 Section D. Closed-Out Activities

B-8 Adoption of Local Investment Policies

Plan Year Approved: 2014

Implemented: N/A

Amended: N/A

Refer to Section 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.

Applicability of This Activity to Special Purpose Vouchers (SPVs):

- Already applied to the following SPVs – FYI, EHV, Mainstream, and VASH
- Seeking to apply to the following SPVs – N/A

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

Closed Out: 2026 - Refer to Section D. Closed out Activities

B-11 Elderly and Disabled Rent Recertifications Every Three Years

Plan Year Approved: 2014

Implemented: 2014

Amended: N/A

Closed Out: 2026 - Refer to Section D. Closed out Activities

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.

Applicability of This Activity to Special Purpose Vouchers: N/A

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, prior to implementing this activity, 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.

Applicability of This Activity to Special Purpose Vouchers (SPVs):

- Already applied to the following SPVs – FYI, EHV, Mainstream, and VASH
- Seeking to apply to the following SPVs – N/A

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).

Applicability of This Activity to Special Purpose Vouchers (SPVs):

- Already applied to the following SPVs – FYI, EHV, Mainstream, and VASH
- Seeking to apply to the following SPVs – N/A

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).

Applicability of This Activity to Special Purpose Vouchers (SPVs):

- Already applied to the following SPVs – FYI, EHV, Mainstream, and VASH
- Seeking to apply to the following SPVs – N/A

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 (annual recertification), rather than to be implemented at the second annual recertification following the change. Under present regulations, housing authorities may not lower payment standards until the second 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.

While this activity has not been implemented since its approval, current PMHA management staff would like to keep the activity as-is, because it may be implemented in the future.

Applicability of This Activity to Special Purpose Vouchers (SPVs):

- Already applied to the following SPVs – N/A
- Seeking to apply to the following SPVs upon implementation of this activity – FYI, EHV, Mainstream, and VASH

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.

While this activity has not been implemented since its approval, current PMHA management staff would like to keep the activity as-is, because it may be implemented in the future.

Applicability of This Activity to Special Purpose Vouchers: N/A

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, current PMHA management staff would like to keep the activity as-is, because it may be implemented in the future.

Applicability of This Activity to Special Purpose Vouchers: N/A

Planned Non-Significant Changes: None

Planned Changes to Metrics/Data Collection: None

Planned Significant Changes: None

C. ACTIVITIES ON HOLD

There are currently no activities on hold.

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 (HCV) Participants

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

PMHA established time limits for the HCV 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 and/or non-participation in education. When an individual reached the end of their 36 months, they 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-10 Biennial Reviews for Non-elderly/Non-disabled Households

Plan Year Approved: 2014

Implemented: 2014

Amended: 2015, 2016

Closed Out: 2026

PMHA would conduct reviews of income at least once every 24 months as opposed annually. Families were permitted to continue to request interim reviews at any time. This activity was 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 recertifications 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 recertifications. The activity was reimplemented 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. It was never reimplemented due to these reasons and thus it was closed out.

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.

HCV-18 Payment Standards at 120% of the FMR

Plan Year Approved: 2025
Implemented: N/A
Amended: N/A
Closed Out: 2026

In order to mitigate the negative impacts of implementing SAFMRs, PMHA established an alternative payment standard of 120% of the FMR, jurisdiction wide. The goal was to increase affordability and housing choice for low-income families. This activity was never implemented, as it was administratively burdensome and would have been costly to implement.

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

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 or 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 closed 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 reverification 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-4 Proration of the Utility Allowance Schedule Up to the Percentage of Probation of Funding as Established by HUD Due to Appropriations

Plan Year Approved: 2009
Implemented: 2014 (Public Housing Program only)
Amended: N/A
Closed Out: 2026

To offer an additional tool to deal with reductions in HUD subsidy for Public Housing or Housing Choice Vouchers, PMHA had authority to reduce utility allowance payments to address funding shortfalls. This activity was implemented in 2014 for the Public Housing Program; however, it was not utilized in 2017 through 2026. For the HCV Program, this activity was never implemented. This activity was closed out due to being of no benefit to the residents and minimal benefit to PMHA as compared to administrative burden.

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 was 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.

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

Plan Year Approved: 2014
Implemented: 2014
Amended: N/A
Closed Out: 2026

Under this activity, PMHA ceased verifying any fully excluded income sources for households, with the goal of simplifying income verifications, saving time for PMHA staff, participants, and other agencies. However, this activity was no longer needed due to the implementation of activity B-13 in 2022, and this activity was put on hold in the same year. Activity B-13 allows PMHA to use self-certification as the highest form of income verification, and it has been successful in helping with time savings and reducing agency costs. As a result, activity B-10 was closed out due to no longer being relevant.

B-11 Elderly and Disabled Rent Recertifications Every Three Years

Plan Year Approved: 2014
Implemented: 2014

Amended: N/A
Closed Out: 2026

This activity allowed PMHA to conduct recertifications 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 recertifications. 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. For these same reasons, the activity was closed out in 2026.

SECTION V: PLANNED APPLICATION OF MTW FUNDS

A. PLANNED APPLICATION 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	\$956,075
70600	HUD PHA Operating Grants	\$22,430,748
70610	Capital Grants	\$1,598,780
70700 (70710+70720+70730+70740+70750)	Total Fee Revenue	\$0
71100+72000	Interest Income	\$67,979
71600	Gain or Loss on Sale of Capital Assets	\$9,401
71200+71300+71310+71400+71500	Other Income	\$312,748
70000	Total Revenue	\$24,159,641

ii. Estimated Applications of MTW Funds

The MTW PHA shall provide the estimated application of MTW spending by Financial Data Schedule (FDS) line item. Only amounts estimated to be spent during the plan year should be identified here; unspent funds that the MTW PHA is not planning on expending during the plan year should not be included in this section.

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	\$2,284,798
91300+91310+92000	Management Fee Expense	\$612,722
91810	Allocated Overhead	\$0
92500 (92100+92200+92300+92400)	Total Tenant Services	\$111,784
93000 (93100+93600+93200+93300+93400+93800)	Total Utilities	\$390,140
93500+93700	Labor	\$0
94000 (94100+94200+94300+94500)	Total Ordinary Maintenance	\$1,590,535
95000 (95100+95200+95300+95500)	Total Protective Services	\$0
96100 (96110+96120+96130+96140)	Total Insurance Premiums	\$194,953
96000 (96200+96210+96300+96400+96500+96600+96800)	Total Other General Expenses	\$198,839
96700 (96710+96720+96730)	Total Interest Expense & Amortization Cost	\$15,527
97100+97200	Total Extraordinary Maintenance	(\$28,501)
97300+97350	HAP + HAP Portability-In	\$14,278,480
97400	Depreciation Expense	\$1,050,977
97500+97600+97700+97800	All Other Expense	\$0
90000	Total Expenses	\$21,000,254

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.

iii. 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 fees³/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.

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.

In 2025, 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 the following activity:

1. Main Office Parking Lot Expansion – PMHA added 26 additional parking spaces at the south end of the main office building. A retaining wall was built where the parking lot meets yard space. Additionally, several parking spaces were added to the paved area at the south end of the maintenance garage. This project was necessary because the parking lot did not provide adequate parking space for staff and clients. Additional parking was 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.

iv. 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*	\$0	\$0
HCV Admin Fee	\$515,817	\$0
PH Operating Subsidy	\$543,277	\$0
TOTAL:	\$1,059,094	\$0

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.

FDS Line Number	FDS Line Item	Definition
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.
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 2027. 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.

(V). LOCAL ASSET MANAGEMENT PLAN

i. Is the MTW PHA allocating costs within statute?

Yes

ii. Is the MTW PHA implementing a local asset management plan (LAMP)?

No

iii. Has the MTW PHA provided a LAMP in the appendix?

N/A

- 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.

N/A

(VI). 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.



Update Pending

Update Pending

Update Pending

B. DOCUMENTATION OF PUBLIC PROCESS

PMHA distributed surveys online and in paper format to all Public Housing residents to develop ideas for the 2027 Annual Plan. The survey was emailed to all residents for which PMHA had current email addresses, sent via SurveyMonkey, and distributed in paper format and via QR code at Resident Services events. Residents who preferred to utilize the paper survey were provided with 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 May 5, 2026 through June 1, 2026. A total of 60 surveys from 53 unique households were completed. Records of all survey responses are kept at the PMHA main office.

The final draft of the 2027 MTW Plan was made available for public review on August, 2026, with a public hearing held on September 14, 2026.

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 2027 Annual Plan

Monday, September 14, 2026 at 2:00 p.m.

AGENDA

- I. Introduction
- II. Background on the Moving to Work Program
 - PMHA's MTW link: <https://portagehousing.org/programs/moving-to-work/>
- 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 2027 Annual Plan
 - Goals and general operating information
 - No proposed new or revised MTW activities for 2027
 - No changes in 2027 for existing implemented MTW activities
 - Applicability of MTW features to Special Purpose Vouchers (SPVs)
 - Updates on projects utilizing HUD-held reserves
- V. Other Issues, Comments, and/or Questions
- VI. Adjournment



Public Hearing Minutes

Minutes
Update Pending

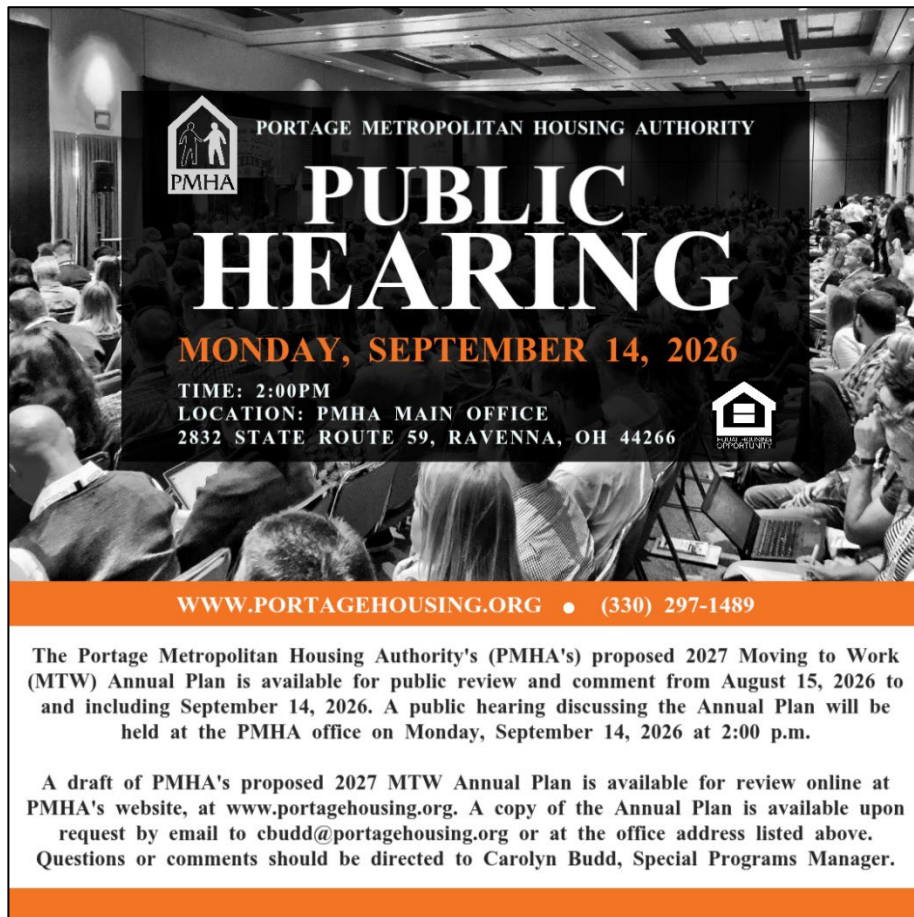
Public Hearing Attendance Record

Attendance	
Update Pending	

Classified Advertisement in the Record-Courier

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

Classified Ad	Update Pending
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The flyer is for a public hearing by the Portage Metropolitan Housing Authority (PMHA). It features a background image of a crowded public hearing room. The text is overlaid on this image. At the top left is the PMHA logo, which depicts a stylized house with two figures inside. The text 'PORTAGE METROPOLITAN HOUSING AUTHORITY' is at the top center. Below that, 'PUBLIC HEARING' is written in large, bold, white capital letters. The date 'MONDAY, SEPTEMBER 14, 2026' is in orange. The time 'TIME: 2:00PM' and location 'LOCATION: PMHA MAIN OFFICE' are in white. The full address '2832 STATE ROUTE 59, RAVENNA, OH 44266' is also in white. At the bottom left of the flyer is the website 'WWW.PORTAGEHOUSING.ORG' and the phone number '(330) 297-1489'. Below the flyer, there is a white box with black text providing details about the 2027 Moving to Work (MTW) Annual Plan, including its availability for public review and comment from August 15, 2026, to September 14, 2026, and information on how to request a copy or provide feedback.

PORTAGE METROPOLITAN HOUSING AUTHORITY

PUBLIC HEARING

MONDAY, SEPTEMBER 14, 2026

TIME: 2:00PM
LOCATION: PMHA MAIN OFFICE
2832 STATE ROUTE 59, RAVENNA, OH 44266

WWW.PORTAGEHOUSING.ORG • (330) 297-1489

The Portage Metropolitan Housing Authority's (PMHA's) proposed 2027 Moving to Work (MTW) Annual Plan is available for public review and comment from August 15, 2026 to and including September 14, 2026. A public hearing discussing the Annual Plan will be held at the PMHA office on Monday, September 14, 2026 at 2:00 p.m.

A draft of PMHA's proposed 2027 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 Certification of Payments to Influence Federal Transactions (form HUD-50071) are on the next page:

OMB Number: 4040-0013
Expiration Date: 06/30/2028

Portage Metropolitan Housing Authority
2027 MTW Annual Plan

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, RFE, Department of Housing and Urban Development, 451 7th St SW, Room 4176, Washington, DC 20410-5000. 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

Pamela Nation Calhoun

Date (mm/dd/yyyy)

06/09/2026

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.

For the purposes of the Capital Fund Program (CPF), a significant amendment to the CPF 5-Year Action Plan is the addition of proposed demolition, disposition, homeownership, capital fund financing, development, or mixed-finance proposal.

Resident Commissioner: The City Manager of Kent, Ohio appoints the resident commissioner position. This position is currently occupied by Shynice Steward. She was appointed to this position on November 21, 2024, and her term expires on October 31, 2026.

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 the 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 members prepare 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).

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

1. Eastowne Manor & Etna House

- a. Full Modernization of Eastowne & Etna Elevators- Both the Eastowne Manor and Etna House elevators need 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 to combine the generators into the elevator project to be done together. The cost associated is not included in the budget estimates. The Eastowne Manor elevator project was completed in August 2025, and the Etna House elevator project was completed in September 2025.
- b. Roof Replacement- The Etna House roof replacement and the Eastowne Manor roof replacement were both completed in 2023.
- c. Intercom & Door System Replacement- The Etna House system replacement was completed in 2022. The Eastowne Manor system replacement was completed in 2024.

- d. Community Room, Computer Lab and Lobby Upgrade- The project was completed at both Etna House and Eastowne Manor in 2024.
2. Etna House – Installation of air conditioning- This project was completed in 2025.
3. Eastowne Manor – Upgrade of office space- This project was completed in 2024.
4. Scattered Sites – Installation of new HVAC systems- This project was completed at all thirty-seven (37) scattered sites over the course of 2024 and 2025.
5. PHA-Wide Appliance Replacement- 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 complete, and PMHA plans to update appliances by site until all are replaced.

Planned Uses of HUD-held Reserves – Projects 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, four (4) of the six (6) playgrounds have been completed. The remaining two (2) playgrounds will be completed in June 2026.
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, this project had not yet been put out to bid.
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, four (4) of the six (6) pavilions have been completed. The remaining two (2) pavilions will be completed in June 2026.
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. In 2024-2025, the units at both Jefferson and Fourth were renovated. Interior upgrades at Henderson, Scranton, and 1 of 2 duplex units at Blanton were completed as of the writing of this plan.
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. As of the writing of this Plan, the initial due diligence phase (site planning, work by architect and engineer, approval of the plans, etc.) has been completed. PMHA has a cost estimate but, given the current climate we are operating in and our HUD-held reserve level being

diminished, PMHA has not yet moved forward. Additional analysis of the fiscal impact and funding sources is needed. PMHA plans to revisit this and have a work plan later in 2026 or in 2027.

Planned Uses of HUD-held Reserves – Projects from 2025 Plan – Update:

1. Development of Up to Five (5) Housing Units- PMHA will develop up to five (5) units of affordable housing. The units will be market rent units available for lease to both Housing Choice Voucher program participants and unassisted renters. As of the writing of this Plan, the planning phase was on hold due to the current climate we are operating in and our HUD-held reserve level being diminished. Additional analysis of the fiscal impact and funding sources is needed.
2. Public Housing Summer Camps- PMHA will operate summer camps for youth ages 5-14 at each of PMHA's six (6) family sites. The camp was in full operation at all six (6) sites during the summers of 2025 and 2026.
3. Public Housing Summer Camp Staffing- PMHA will 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. PMHA employed twelve (12) new Social Service Coordinators to staff the camp during the summer of 2025.
4. PHA-Wide Parking Lot, Driveway, and Sidewalk Repair/Replacement- PMHA will repair/replace parking lots, driveways, and sidewalks at all Public Housing sites. As of the writing of this Plan, the Ravenna (Harvest) Woods drives and sidewalks have all been replaced in 2025. As of the writing of this Plan, parking lots have been completed at Renaissance Place and Harvest (Ravenna) Woods. The Eastowne Manor parking lots and sidewalks are expected to be completed by July 2026.
5. Improvements to the Opportunity Resource Center (ORC)- PMHA will 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 will 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. As of the writing of this Plan, repairs were completed to the brick facade in 2025, but no further progress has been made.

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. The 50075.2 begins on the next page.

Capital Fund Program – Five Year Action Plan

U.S. Department of Housing and Urban Development Office of Public and Indian Housing 2577-0274 02/28/2022						
Capital Fund Program - Five-Year Action Plan						
Status: Approved		Approval Date: 05/13/2026		Approved By: MURRAY, BRIAN		
Part I: Summary						
PHA Name : Portage Metropolitan Housing Authority		Locality (City/County & State) ☒ Original 5-Year Plan ☐ Revised 5-Year Plan (Revision No:)				
PHA Number: OH031						
A.	Development Number and Name	Work Statement for Year 1 2026	Work Statement for Year 2 2027	Work Statement for Year 3 2028	Work Statement for Year 4 2029	Work Statement for Year 5 2030
	CENTRAL OFFICE (OH031009999)	\$99,673.60	\$99,673.60	\$99,673.60	\$99,673.60	\$99,673.60
	EAST SIDE DEVELOPMENTS (OH031000001)	\$622,312.12	\$621,664.24	\$621,664.24	\$621,664.24	\$621,664.24
	WEST SIDE DEVELOPMENTS (OH031000002)	\$274,750.28	\$275,398.16	\$275,398.16	\$275,398.16	\$275,398.16

Form HUD-50075.2(4/2008)

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 1 2026				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	CENTRAL OFFICE (OH031009999)			\$99,673.60
ID0000096	Administration(Administration (1410)-Salaries)	Admin		\$99,673.60
	EAST SIDE DEVELOPMENTS (OH031000001)			\$622,312.12
ID0000097	Operations(Operations (1406))	Operations		\$172,684.51
ID0000099	MTW Demonstration(MTW (1492))	MTW Demonstration		\$449,627.61
	WEST SIDE DEVELOPMENTS (OH031000002)			\$274,750.28
ID0000098	Operations(Operations (1406))	Operations		\$76,499.49

Capital Fund Program - Five-Year Action Plan

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
2577-0274
02/28/2022

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 1 2026				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0000100	MTW Demonstration(MTW (1492))	MTW Demonstration		\$198,250.79
	Subtotal of Estimated Cost			\$996,736.00

Form HUD-50075.2(4/2008)

Capital Fund Program - Five-Year Action Plan

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
2577-0274
02/28/2022

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 2 2027				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	CENTRAL OFFICE (OH031009999)			\$99,673.60
ID0000101	Administration(Administration (1410)-Salaries)	Admin		\$99,673.60
	EAST SIDE DEVELOPMENTS (OH031000001)			\$621,664.24
ID0000102	Operations(Operations (1406))	Operations		\$69,073.80
ID0000104	MTW Demonstration(MTW (1492))	MTW Demonstration		\$552,590.44
	WEST SIDE DEVELOPMENTS (OH031000002)			\$275,398.16
ID0000103	Operations(Operations (1406))	Operations		\$30,599.80

Form HUD-50075.2(4/2008)

Capital Fund Program - Five-Year Action Plan

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
2577-0274
02/28/2022

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 2 2027				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0000105	MTW Demonstration(MTW (1492))	MTW Demonstration		\$244,798.36
	Subtotal of Estimated Cost			\$996,736.00

Form HUD-50075.2(4/2008)

Capital Fund Program - Five-Year Action Plan

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
2577-0274
02/28/2022

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 3 2028				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	CENTRAL OFFICE (OH031009999)			\$99,673.60
ID0000106	Administration(Administration (1410) Salaries)	Admin		\$99,673.60
	EAST SIDE DEVELOPMENTS (OH031000001)			\$621,664.24
ID0000109	Operations(Operations (1406))	Operations		\$69,073.80
ID0000115	MTW Demonstration(MTW (1492))	MTW Demonstration		\$552,590.44
	WEST SIDE DEVELOPMENTS (OH031000002)			\$275,398.16
ID0000112	Operations(Operations (1406))	Operations		\$30,599.80

Form HUD-50075.2(4/2008)

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 3 2028				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
1D0000/118	MTW Demonstration(MTW (1492))	MTW Demonstration		\$244,798.36
	Subtotal of Estimated Cost			\$996,736.00

Capital Fund Program - Five-Year Action Plan

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
2577-0274
02/28/2022

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 4 2029				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	CENTRAL OFFICE (OH031009999)			\$99,673.60
ID0000107	Administration/Administration (1410)-Salaries)	Admin		\$99,673.60
	EAST SIDE DEVELOPMENTS (OH031000001)			\$621,664.24
ID0000110	Operations(Operations (1406))	Operations		\$69,073.80
ID0000116	MTW Demonstration(MTW (1492))	MTW Dcmonstration		\$552,590.44
	WEST SIDE DEVELOPMENTS (OH031000002)			\$275,398.16
ID0000113	Operations(Operations (1406))	Operations		\$30,599.80

Form HUD-50075.2(4/2008)

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 4 2029				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0000119	MTW Demonstration(MTW (1492))	MTW Demonstration		\$244,798.36
	Subtotal of Estimated Cost			\$996,736.00

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 5 2030				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
	CENTRAL OFFICE (OH031009999)			\$99,673.60
ID0000108	Administration(Administration (1410)-Salaries)	Admin		\$99,673.60
	EAST SIDE DEVELOPMENTS (OH031000001)			\$621,664.24
ID0000111	Operations(Operations (1406))	Operations		\$69,073.80
ID0000117	MTW Demonstration(MTW (1492))	MTW Demonstration		\$552,590.44
	WEST SIDE DEVELOPMENTS (OH031000002)			\$275,398.16
ID0000114	Operations(Operations (1406))	Operations		\$30,599.80

Capital Fund Program - Five-Year Action Plan

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
2577-0274
02/28/2022

Part II: Supporting Pages - Physical Needs Work Statements (s)				
Work Statement for Year 5 2030				
Identifier	Development Number/Name	General Description of Major Work Categories	Quantity	Estimated Cost
ID0000120	MTW Demonstration(MTW (1492))	MTW Demonstration		\$244,798.36
	Subtotal of Estimated Cost			\$996,736.00

Form HUD-50075.2(4/2008)