

PHA 5-Year and Annual Plan		U.S. Department of Housing and Urban Development Office of Public and Indian Housing		OMB No. 2577-0226 Expires 4/30/2011	
1.0	PHA Information PHA Name: <u>Lee County Housing Authority (LCHA)</u> PHA Code: <u>FL 128</u> PHA Type: <input checked="" type="checkbox"/> Small <input checked="" type="checkbox"/> High Performing <input type="checkbox"/> Standard <input type="checkbox"/> HCV (Section 8) PHA Fiscal Year Beginning: (MM/YYYY): <u>10/2013</u>				
2.0	Inventory (based on ACC units at time of FY beginning in 1.0 above) Number of PH units: <u>142</u> Number of HCV units: <u>271</u>				
3.0	Submission Type <input type="checkbox"/> 5-Year and Annual Plan <input type="checkbox"/> Annual Plan Only <input checked="" type="checkbox"/> 5-Year Plan Only				
4.0	PHA Consortia <input type="checkbox"/> PHA Consortia: (Check box if submitting a joint Plan and complete table below.)				
	Participating PHAs	PHA Code	Program(s) Included in the Consortia	Programs Not in the Consortia	No. of Units in Each Program
	PHA 1:				PH HCV
	PHA 2:				
	PHA 3:				
5.0	5-Year Plan. Complete items 5.1 and 5.2 only at 5-Year Plan update.				
5.1	Mission. State the PHA's Mission for serving the needs of low-income, very low-income, and extremely low income families in the PHA's jurisdiction for the next five years: Provide decent, safe and sanitary rental housing for eligible families and to provide opportunities and promote self-sufficiency and economic independence for PHA and Section 8 participants.				
5.2	Goals and Objectives. Identify the PHA's quantifiable goals and objectives that will enable the PHA to serve the needs of low-income and very low-income, and extremely low-income families for the next five years. Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5-Year Plan. Increase availability of decent, safe, and affordable housing; improve community quality of life and economic vitality. Promote self-sufficiency and asset development of families and individuals to ensure equal opportunity in housing for all residents. LCHA received a one-year FSS Coordinator grant in 2013 and, in 2011, a ROSS Coordinator grant for three years - both assist in meeting LCHA's established service and housing goals for public housing. LCHA received a one-year HCV/FSS grant in 2013 to promote self-sufficiency in the Housing Choice Voucher Program (HCV). LCHA has met its goals in the previous 5-Year Plan by; a) Ensuring equal opportunity access to assisted/affordable housing. b) Offering supportive services to its tenants towards the goals of obtaining employment and accessing benefits, improving their quality of life, and greater self-sufficiency. c) Providing stable, decent and affordable housing to those who need it most. d) Making the housing application process easier and more readily available and accessible. This included putting the application process online on the LCHA website. e) Providing VASH Vouchers for Veterans and FUP Vouchers for transitional youth leaving foster care. f) The HUD HCV-FSS service program had eight graduates in 2012 with resident escrow/savings amounts ranging from \$452 to \$14,790.				

PHA Plan Update

(a) Identify all PHA Plan elements that have been revised by the PHA since its last Annual Plan submission:
LCHA has added a No Smoking Policy to its properties. The Policy is attached.

(b) Identify the specific location(s) where the public may obtain copies of the 5-Year and Annual PHA Plan. For a complete list of PHA Plan elements, see Section 6.0 of the instructions.

Main Administration Office: LCHA, 14170 Warner Circle, North Fort Myers, FL 33903
The plan may be viewed on LCHA's website at leecountyha.org.

Per HUD Public Housing requirements, the following policies and procedures are available at our administrative offices.

- a) No Smoking Policy was put into effect on January 1st, 2013 (the new policy is attached)
- b) Pet Policy
- c) Safety and Crime Prevention Policy
- d) Zero Tolerance Policy
- e) Community Service and Self-Sufficiency Policy
- f) Grievance Procedures
- g) Eligibility, Selection and Admissions Policies
- h) Operation and Management Standards
- i) Rent Determination

Fiscal Year Audits. LCHA Audits from 2012 and 2013 have been submitted to HUD. There were no findings.

Violence against Women Act (VAWA). LCHA's policy on Violence Against Women Act continues to be enforced with no changes since the last 5-Year Plan.

6.0

Annual Plan FY 2014 Section 6.0 – (2) Financial Resources: Planned Sources and Uses – Lee County Housing Authority FL128		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2007 grants)		
a) Public Housing Operating Fund	510,000	
b) Public Housing Capital Fund	314,500	
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	1,850,000	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants	100,000	
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
DCA Hurricane Mitigation		
Lee County (SHIP) (Bonair)		
2. Prior Year Federal Grants (unobligated funds only) (list below)		
CFP FFY 2013	157,994	
3. Public Housing Dwelling Rental Income	258,000	
4. Other income (list below)		
2013/2014 SHIP Grant	295,861	
4. Non-federal sources (list below)		
Total resources	3,486,355	

7.0

Hope VI, Mixed Finance Modernization or Development, Demolition and/or Disposition, Conversion of Public Housing, Homeownership Programs, and Project-based Vouchers. Include statements related to these programs as applicable.

8.0

Capital Improvements. Please complete Parts 8.1 through 8.3, as applicable.

See HUD Form 50075.2 sent to HUD for approval on June ____, 2014.

8.1

Capital Fund Program Annual Statement/Performance and Evaluation Report. As part of the PHA 5-Year and Annual Plan, annually complete and submit the *Capital Fund Program Annual Statement/Performance and Evaluation Report*, form HUD-50075.1, for each current and open CFP grant and CFFP financing.

8.2

Capital Fund Program Five-Year Action Plan. As part of the submission of the Annual Plan, PHAs must complete and submit the *Capital Fund Program Five-Year Action Plan*, form HUD-50075.2, and subsequent annual updates (on a rolling basis, e.g., drop current year, and add latest year for a five year period). Large capital items must be included in the Five-Year Action Plan.

8.3	<p>Capital Fund Financing Program (CFFP). <input type="checkbox"/> Check if the PHA proposes to use any portion of its Capital Fund Program (CFP)/Replacement Housing Factor (RHF) to repay debt incurred to finance capital improvements.</p>
9.0	<p>Housing Needs. Based on information provided by the applicable Consolidated Plan, information provided by HUD, and other generally available data, make a reasonable effort to identify the housing needs of the low-income, very low-income, and extremely low-income families who reside in the jurisdiction served by the PHA, including elderly families, families with disabilities, and households of various races and ethnic groups, and other families who are on the public housing and Section 8 tenant-based assistance waiting lists. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location.</p> <p>LCHA focuses on meeting low-income and special needs housing throughout Lee County, Florida. The need for more affordable housing for very-low to low-income families, including homeless families, youth aging out of foster care, veterans, and the special needs populations is both significant and growing. In accordance with Lee County Consolidated Plan, identified needs include affordable permanent supportive housing to serve the homeless population, comprised of both individuals and families with children. The homeless subpopulations are chronically homeless, severely mentally ill, chronic substance abusers, veterans, persons with HIV/AIDS, survivors of domestic violence, and youth under the age of 18 years. As rents climb higher in Lee County, affordable rental units are among the biggest housing need.</p> <p>The 2013 homeless statistics for the Continuum of Care were released by the local Homeless Coalition in April 2014. Those statistics summarized are the following: 871 homeless individuals; 572 males and 299 females. Of those, 92 were under 18 years, 660 were between 18-60, and 106 were elderly (over 60). 120 of the homeless were veterans. 62 homeless families were identified with 189 family members.</p> <p>The Census data indicates that in the City of Fort Myers in 2012, the per capita annual income was \$22,801; the median household income was \$37,320; and 26% of residents live below the poverty level. In Lee County the Census data reports that the per capita annual income is \$28,105; median household income is \$48,453; and the percentage of persons living below the poverty level is 14.5%.</p> <p>LCHA's Current Applicant Pool: Total Applicants: 574: White 464 (non Hispanic = 258 / Hispanic = 206) Black 108 American Indian 1 Asian 1</p>
9.0	<p>AMI: Elderly = 97 Accessible Units for Disabled = 8 Extremely low: 30% = 508 Disabled = 88 Very Low: 50% = 61 Low: 80% = 5</p>
9.1	<p>Strategy for Addressing Housing Needs. Provide a brief description of the PHA's strategy for addressing the housing needs of families in the jurisdiction and on the waiting list in the upcoming year. Note: Small, Section 8 only, and High Performing PHAs complete only for Annual Plan submission with the 5-Year Plan.</p> <p>The strategy includes continuing to seek additional Section 8 Housing Choice Vouchers. LCHA will reduce turnover time for vacated Public Housing units and utilize effective maintenance and management policies to minimize offline units. Other strategies include putting our application online for greater accessibility; marketing Section 8 to apartment owners; increasing the number of affordable housing units by pursuing housing resources other than public housing or Section 8, and investigate the purchase and/or building of additional affordable housing. Another strategy is to increase self-sufficiency programs and acquire new grants for the transition of low-income families out of governmental assistance and into home ownership. LCHA utilizes 35 VASH Vouchers to provide housing to homeless veterans; administers 25 Family Unification Program (FUP) vouchers that provide housing to youths aging out of foster care and families at risk of losing their housing and breaking up the family unit; gives admissions preference for VAWA applicants; and promotes fair housing through seminars, workshops and training. Families and individuals seeking housing assistance who we cannot immediately assist will be referred to a number of other community service organizations.</p> <p>Lee County Housing Authority is planning a merger with the Housing Authority of the City of Fort Myers (HACFM) (FL047). The Board of Commissioners of both agencies are in agreement and working towards the merger. FL General Statute 421 must be revised before the merger can take place, steps to facilitate the law change are in progress. The merger is expected to take place in 2015.</p>

<p>10.0</p>	<p>Additional Information. Describe the following, as well as any additional information HUD has requested.</p> <p>(a) Progress in Meeting Mission and Goals. Provide a brief statement of the PHA's progress in meeting the mission and goals described in the 5-Year Plan.</p> <p>LCHA has served the community with affordable housing with 142 PII units and 271 HCV units. Resident services such as educational workshops and referrals for numerous services (employment training, benefits counseling, health and child care services), have been provided to those residents seeking them. LCHA has also made some of its services, such as educational workshops, available to the community as a whole. LCHA will adopt HUD-mandated rent policies to increase flat rents to be not less than 80% of the most current HUD-published fair market rate rent.</p> <p>(b) Significant Amendment and Substantial Deviation/Modification. Provide the PHA's definition of "significant amendment" and "substantial deviation/modification"</p> <ul style="list-style-type: none"> • A change in policy pertaining to the operation of LCHA related to major strategies to address housing needs and to major policies governing eligibility, selection or admissions and rent determination will be considered Significant Amendments or Modifications. All major modifications require full public process. • LCHA may set funds in a line item where there were none. New work items (excluding Emergency work) that are not included in the CFP and that cumulatively exceed 10% of the fiscal year's CFP (\$50,000), may be considered Significant Amendments or Modifications. Changes in use of the replacement reserve under the CFP may be considered Significant Amendments or Modifications.
<p>11.0</p>	<p>Required Submission for HUD Field Office Review. In addition to the PHA Plan template (HUD-50075), PHAs must submit the following documents. Items (a) through (g) may be submitted with signature by mail or electronically with scanned signatures, but electronic submission is encouraged. Items (h) through (i) must be attached electronically with the PHA Plan. Note: Faxed copies of these documents will not be accepted by the Field Office.</p> <p>(a) Form HUD-50077, <i>PIIA Certifications of Compliance with the PHA Plans and Related Regulations</i> (which includes all certifications relating to Civil Rights)</p> <p>(b) Form HUD-50070, <i>Certification for a Drug-Free Workplace</i> (PHAs receiving CFP grants only)</p> <p>(c) Form HUD-50071, <i>Certification of Payments to Influence Federal Transactions</i> (PHAs receiving CFP grants only)</p> <p>(d) Form SF-L.L.L., <i>Disclosure of Lobbying Activities</i> (PHAs receiving CFP grants only)</p> <p>(e) Form SF-L.L.L.-A, <i>Disclosure of Lobbying Activities Continuation Sheet</i> (PHAs receiving CFP grants only)</p> <p>(f) Resident Advisory Board (RAB) comments. Comments received from the RAB must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the recommendations and the decisions made on these recommendations.</p> <p>(g) Challenged Elements</p> <p>(h) Form HUD-50075.1, <i>Capital Fund Program Annual Statement/Performance and Evaluation Report</i> (PHAs receiving CFP grants only)</p> <p>(i) Form HUD-50075.2, <i>Capital Fund Program Five-Year Action Plan</i> (PHAs receiving CFP grants only)</p>



Robert Norris, Chairman
Cynthia Shafer, Vice Chairperson
Donald H. Komito, Commissioner
James W. Green, Commissioner
Mary W. Moore, Commissioner

Lee County Housing Authority (LCHA)
14170 Warner Circle, North Fort Myers, FL 33903
Marcus D. Goodson, Executive Director
Phone: 239.997.6688
Fax: 239.997.7970
TTY #: (800) 955-8771
Website: leecountyha.org

Lee County Housing Authority *Capital Fund Program Meeting*

The Lee County Housing Authority held their annual capital fund program meeting at Pine Echo I Community Center, located at 14073 Whitebirch Way, North Fort Myers, 33903, on Monday, April 14, 2014 at 2:00 p.m. The topic of discussion was the Capital Fund Program for the five year planning for Year 2015 to 2019, to include current budget plans for FY 2014.

Those present were: Sherri Campanale, Director of Housing Operations & Maintenance, Monica Solorzano, Property Manager and Jeanne S. Dufresne, Procurement Officer and ten (10) residents.

Sherri Campanale opened the meeting at 2:06 pm with a brief explanation of what can be considered Capital Improvements. The items pointed out that can be considered would include items such as roof replacement, appliance replacement, road work and new entry doors, toilets, etc. She also explained that LCHA is a small agency and that the amount of money that HUD provides for major improvements is limited compared to larger agencies and some of the planned projects may be done over several years to cover the cost with the available funds. She did point out that in the past, LCHA received approximately \$100K and this year they will be receiving around \$300. This may be attributed to the fact that LCHA has achieved "high performer" status at the last REAC inspection. It is hoped that HUD will continue to provide the \$300K in future years as we planned for the next five years. Ms Campanale pointed out that it is necessary to bring our properties up to current year standards, through improved energy efficiency and upgrades. She then turned the meeting over to Jeanne S. Dufresne to explain what the Housing Authority recognized as the most critical needs at the properties.

Ms Dufresne went over the disposition of the previous requests. New stoves and refrigerators were provided to Pine Echo II and Barrett Park and refrigerators only were installed at Pine Echo I. Pine Echo I, through the Weatherization Grant had received new HVAC systems, insulation, window tinting, exterior door weather stripping, hot water tanks as needed, water saving devices, etc. Barrett Park will be receiving new exterior doors and hardware, HVAC systems replacement and 20 units will be getting individualized Special Needs rehabilitation. Pine Echo II recently received new kitchen cabinets and vanities, sinks and supply lines and shut off valves. We also noted that the cost of some of these projects exceeds the annual allocation received from HUD and may use two or more years worth of funds to cover the cost.

The projects listed for the Five Year Plan we are here to discuss include: partial road improvements for the areas designated at each development most in need of repairs because to



replace all the roads would exceed the annual budget; toilet replacement at all properties; Cabinetry – Kitchens and bathroom vanities at Pine Echo I and Barrett Park; Entry Doors at Pine Echo II; Stove replacement for Pine Echo I after the cabinetry has been replaced and can accommodate standard size ranges; Floor covering replacement at Pine Echo II; HVAC system replacement at Pine Echo II and Entry Signs for each property.

This plan could be altered by an emergency that could arise and require a deviation. We are always looking for other sources of income from available grant programs or donations that may fund more projects, so things can change.

While most of these items were requested by the residents we are here to get additional input for those who live in the communities for other projects that you may feel would benefit each property.

Suggestions and or requests from the residents:

- Window screens and screen doors
- Benches throughout the community
- Laundry area/dryers at Barrett Park with Wi-Fi
- Repairs to drainage ditches at Pine Echo I

Other comments were maintenance related to an individual's unit and noted by the property manager. Residents were urged to call work orders directly to the rental office and not expect a maintenance tech to remember a verbal request. This would assure residents that there was a record of the service needed.

Should anyone at the meeting or neighbors who were not able to make the meeting think of other items they would like to have added to the list, they are welcome to submit written suggestions to the office.

There being no further discussion, the meeting adjourned at 3:45 pm.





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Lee County Housing Authority *Capital Fund Program Meeting*

The Lee County Housing Authority held their annual capital fund program meeting at Pine Echo I Community Center, located at 14073 Whitebirch Way, North Fort Myers, 33903, on Tuesday, April 15, 2014 at 6:00 p.m. The topic of discussion was the Capital Fund Program for the five year planning for Year 2015 to 2019, to include current budget plans for FY 2014.

Those present were: Sherri Campanale, Director of Housing Operations & Maintenance, Marcus D. Goodson, Executive Director, Monica Solorzano, Property Manager and Jeanne S. Dufresne, Procurement Officer and two (2) residents.

Sherri Campanale opened the meeting at 6:08 pm with a brief explanation of what can be considered Capital Improvements. The items pointed out that can be considered would include items such as roof replacement, appliance replacement, road work and new entry doors, toilets, etc. She also explained that LCHA is a small agency and that the amount of money that HUD provides for major improvements is limited compared to larger agencies and some of the planned projects may be done over several years to cover the cost with the available funds. She did point out that in the past, LCHA received approximately \$100K and this year they will be receiving around \$300. This may be attributed to the fact that LCHA has achieved "high performer" status at the last REAC inspection. It is hoped that HUD will continue to provide the \$300K in future years as we planned for the next five years. Ms Campanale pointed out that it is necessary to bring our properties up to current year standards, through improved energy efficiency and upgrades. She then turned the meeting over to Jeanne S. Dufresne to explain what the Housing Authority recognized as the most critical needs at the properties.

Ms Dufresne went over the disposition of the previous requests. New stoves and refrigerators were provided to Pine Echo II and Barrett Park and refrigerators only were installed at Pine Echo I. Pine Echo I, through the Weatherization Grant had received new HVAC systems, insulation, window tinting, exterior door weather stripping, hot water tanks as needed, water saving devices, etc. Barrett Park will be receiving new exterior doors and hardware, HVAC systems replacement and 20 units will be getting individualized Special Needs rehabilitation. Pine Echo II recently received new kitchen cabinets and vanities, sinks and supply lines and shut off valves. We also noted that the cost of some of these projects exceeds the annual allocation received from HUD and may use two or more years worth of funds to cover the cost.



The projects listed for the Five Year Plan we are here to discuss include: partial road improvements for the areas designated at each development most in need of repairs because to replace all the roads would exceed the annual budget; toilet replacement at all properties; Cabinetry – Kitchens and bathroom vanities at Pine Echo I and Barrett Park; Entry Doors at Pine Echo II; Stove replacement for Pine Echo I after the cabinetry has been replaced and can accommodate standard size ranges; Floor covering replacement at Pine Echo II; HVAC system replacement at Pine Echo II and Entry Signs for each property.

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While most of these items were requested by the residents we are here to get additional input for those who live in the communities for other projects that you may feel would benefit each property.

Suggestions and or requests from the residents:

- Window screens and screen doors

Other comments were maintenance related to an individual's unit and noted by the property manager. Residents were urged to call work orders directly to the rental office and not expect a maintenance tech to remember a verbal request. This would assure residents that there was a record of the service needed.

Should anyone at the meeting or neighbors who were not able to make the meeting think of other items they would like to have added to the list, they are welcome to submit written suggestions to the office.

There being no further discussion, the meeting adjourned at 6:45 pm.



Smoke-Free Policy

HOH	Development:	Client #:
Address (Apartment)		Date:

This lease addendum (Addendum) entered into this ____ day of _____, 20__ by and between _____ (Resident), and the Lee County Housing Authority (LCHA) amends the Lease Agreement entered into between the parties, at the above Apartment, whether one or more as party to the Lease, hereby agrees that Resident, Resident's household members, and guests shall abide by the following:

1. **Purpose of Smoke Free Policy.** The parties desire to mitigate (i) the increased maintenance, cleaning and redecorating costs from smoking and (ii) the increased risk of fire from smoking.

2. **Definition of Smoking.** The term "smoking" means inhaling, exhaling, breathing, or carrying any lighted cigar, cigarette, tobacco product, or similar lighted product in any manner or in any form.

3. **Smoke Free Building.** Resident agrees and acknowledges that the Apartment to be occupied by Resident, members of Resident's household, or any guests has been designated as a smoke -free living environment. Resident, members of Resident's household or guests shall not smoke anywhere inside the Apartment rented by Resident. Outdoor balconies attached to the Apartment shall be excluded from the above and shall not be deemed to be inside the Apartment.

4. **Residents to Promote Non-Smoking.** Resident shall inform Resident's household and guests of the Smoke Free Policy.

5. **LCHA to Promote Smoke Free Policy.** LCHA shall post non-smoking signs at entrances and exits, common areas, hallways, and in conspicuous places "in close proximity to" the smoke free building.

6. **LCHA Not a Guarantor of Smoke Free Environment.** Resident acknowledges the LCHA's adoption of a smoke-free living environment, and the efforts to designate the apartments as smoke-free. However, this Addendum does not make the LCHA or any of its managing agents the guarantor of Resident's health or of the smoke free condition of Resident's Apartment and Development. LCHA shall use its best efforts to enforce the Smoke Free Policy. LCHA is not required to take steps in response to the Smoke Free Policy unless LCHA has actual knowledge of said smoking or has been given written notice of said smoking.

7. **Material Breach.** A material breach of this Addendum shall be a material breach of the Lease and grounds for immediate termination of the Lease by the LCHA per Section 26 Termination of Lease a, b, d, g, h, i and j. Resident shall be responsible for all damages and costs associated with termination of Lease due to material breach.

8. **Disclaimer by LCHA.** Resident acknowledges the LCHAs adoption of a smoke free living environment, and the efforts to designate the Development as smoke free does not in any way change the standard of care the LCHA or managing agent would have to a resident, resident's household, or guests to render apartments and the Development any safer, habitable, or improved in terms of air quality standards. LCHA specifically disclaims any implied or express warranties that the building, Development or Resident's Apartment will have any higher or improved air quality standards than any other rental property. LCHA cannot and does not warrant or promise that the Development or Apartment will be free from secondhand smoke. Resident acknowledges that LCHA's ability to police, monitor, or enforce this Addendum is dependent in significant part on voluntary compliance by Resident, other household members and guests. Residents with respiratory ailments, allergies, or any other physical or mental condition relating to smoke are put on notice that LCHA does not assume any higher duty of care to enforce this Addendum than any of the other of LCHA's obligations under the Lease.

LCHA has adopted a "Smoke Free" Policy for its housing in accordance with the provisions of HUD Notice H2010-21 (September 15, 2010). It has been well established that smoking cessation has demonstrated health benefits, and that second hand smoke represents a serious health risk to non-smokers.

Smoking in dwelling units is strictly prohibited. LCHA reserves the rights including, but not limited to, termination of tenancy through eviction or the imposition of a reasonable charge for cleaning the Apartment where a violation has been found.

Admission and Continued Occupancy Policy (ACOP) amended for January 1, 2013.

I/We have read and understand the above Smoke Free policy and agree to abide by it during my/our tenancy

SIGNATURE(S):

Resident: _____ Date: _____

Resident: _____ Date: _____

Resident: _____ Date: _____

Resident: _____ Date: _____

LCHA Representative _____ Date _____

08/2012



Lee County Housing Authority Properties

I.

Pine Echo I & II

14170 Warner Circle

North Fort Myers, FL 33903

Total Buildings: 43

Total Units: 92

Year Built: 1984

II.

Barrett Park

14170 Warner Circle

North Fort Myers, FL 33903

Total Buildings: 51

Total Units: 50

Year Built: August 1993

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

U.S. Department of Housing and Urban Development
 Office of Public and Indian Housing
 OMB No. 2577-0226
 Expires 8/31/2011

Part I: Summary		Grant Type and Number		FFY of Grant: 2014	
PHA Name: Lee County Housing Authority		Capital Fund Program Grant No: FL14P12850114		FFY of Grant Approval:	
		Replacement Housing Factor Grant No:			
		Date of CFFP:			
Type of Grant		<input type="checkbox"/> Reserve for Disasters/Emergencies			
<input checked="" type="checkbox"/> Original Annual Statement Performance and Evaluation Report for Period Ending:		<input type="checkbox"/> Revised Annual Statement (revision no:)			
<input type="checkbox"/> Summary by Development Account		<input type="checkbox"/> Final Performance and Evaluation Report			
Line	Original	Total Estimated Cost Revised ²	Obligated	Total Actual Cost ¹	Expended
1	Total non-CFP Funds				
2	1406 Operations (may not exceed 20% of line 21) ³	20,000			
3	1408 Management Improvements	4,596			
4	1410 Administration (may not exceed 10% of line 21)				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement				
10	1460 Dwelling Structures				
11	1465.1 Dwelling Equipment—Nonexpendable	290,000			
12	1470 Non-dwelling Structures				
13	1475 Non-dwelling Equipment				
14	1483 Demolition				
15	1492 Moving to Work Demonstration				
16	1495.1 Relocation Costs				
17	1499 Development Activities ⁴				
18a	1501 Collateralization or Debt Service paid by the PHA				
18ba	9000 Collateralization or Debt Service paid Via System of Direct Payment				
19	1502 Contingency (may not exceed 8% of line 20)				
20	Amount of Annual Grant: (sum of lines 2 - 19)	\$ 314,596	\$ 0.00	\$ 0.00	\$ 0.00
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Section 504 Activities				
23	Amount of line 20 Related to Security - Soft Costs				
24	Amount of line 20 Related to Security - Hard Costs				
25	Amount of line 20 Related to Energy Conservation Measures				
Signature of Executive Director		Signature of Public Housing Director		Date	
				Date	

¹ To be completed for the Performance and Evaluation Report.
² To be completed for the Performance and Evaluation Report or a Revised Annual Statement.
³ PHAs with under 250 units in management may use 100% of CFP Grants for operations.
⁴ RHF funds shall be included here.

Part II: Supporting Pages													
PHA Name: Lee County Housing Authority		Grant Type and Number Capital Fund Program Grant No: FL14P12850114				Federal FFY of Grant: 2014							
Development Number Name/PHA-Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work					
				Original	Revised ¹	Funds Obligated ²	Funds Expended ²						
Pine Echo – FL000001	Road Repair Resurface	1470		220,000									
Barrett Park – FL000002	Road Repair Resurface	1470		70,000									

¹ To be completed for the Performance and Evaluation Report or a Revised Annual Statement.
² To be completed for the Performance and Evaluation Report.

Capital Fund Program—Five-Year Action Plan

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

Part I: Summary		Locality (City/County & State)		X Original 5-Year Plan <input type="checkbox"/> Revision No:	
PHA Name/Number FL 128 Lee County Housing Authority		North Fort Myers, FL Lee County			
Development Number and Name	Work Statement for Year 1 FFY __2014_	Work Statement for Year 2 FFY __2015__	Work Statement for Year 3 FFY __2016__	Work Statement for Year 4 FFY __2017__	Work Statement for Year 5 FFY __2018__
B. Physical Improvements Subtotal	Annual Statement	225,000	225,000	200,000	275,000
C. Management Improvements		6,000	5,000	7,000	5,000
D. PHA-Wide Non-dwelling Structures and Equipment		4,000		8,000	
E. Administration					
F. Other					
G. Operations		65,000	70,000	85,000	20,000
H. Demolition					
I. Development					
J. Capital Fund Financing – Debt Service					
K. Total CFP Funds					
L. Total Non-CFP Funds		300,000	300,000	300,000	300,000
M. Grand Total					

Capital Fund Program—Five-Year Action Plan

Part I: Summary (Continuation)

PHA Name/Number Lee County Housing Authority	FL128	Locality (City/county & State) North Fort Myers, FL Lee County		Work Statement for Year 2 FFY _____	Work Statement for Year 3 FFY _____	Work Statement for Year 4 FFY _____	Work Statement for Year 5 FFY _____
A. Development Number and Name		Work Statement for Year 1 FFY _____					
		Annual Statement					

Part II: Supporting Pages – Physical Needs Work Statement(s)				
Work Statement for Year 1 FFY _____	Work Statement for Year _____ 2017	Work Statement for Year _____ 2018	FFY _____	FFY _____
Development Number/Name General Description of Major Work Categories	Quantity	Estimated Cost	Development Number/Name General Description of Major Work Categories	Quantity Estimated Cost
PINE ECHO FL128000001			PINE ECHO FL128000001	
Entry Sign	2	8,000	Flooring	46 units 200,000
			HVAC	20 units 75,000
BARRETT PARK FL128000002				
Kitchen/Bath Cabinets	50 units	200,000		
Subtotal of Estimated Cost	\$ 208,000		Subtotal of Estimated Cost	\$ 275,000

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

Work Statement for Year 1 FFY 2014	Work Statement for Year 2015 FFY		Work Statement for Year: 2016 FFY	
See Approval Statement	Development Number/Name General Description of Major Work Categories	Development Number/Name General Description of Major Work Categories	Estimated Cost	Estimated Cost
	PINE ECHO FL12800001 Management Improvements and Staff Training	PINE ECHO FL12800001 Management Improvements and Staff Training	4,000	3,500
	BARRETT PARK FL12800002 Management Improvements and Staff Training	BARRETT PARK FL12800002 Management Improvements and Staff Training	2,000	1,500
	Subtotal of Estimated Cost	Subtotal of Estimated Cost	\$ 6,000	\$ 5,000

