

Streamlined Annual PHA Plan (Small PHAs)

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

OMB No. 2577-0226 Expires
03/31/2024

Purpose. The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, including changes to these policies, and informs HUD, families served by the PHA, and members of the public of the PHA's mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families

Applicability. The Form HUD-50075-SM is to be completed annually by Small PHAs. PHAs that meet the definition of a Standard PHA, Troubled PHA, High Performer PHA, HCV-Only PHA, or Qualified PHA do not need to submit this form.

Definitions.

- (1) **High-Performer PHA** - A PHA that owns or manages more than 550 combined public housing units and housing choice vouchers and was designated as a high performer on both the most recent Public Housing Assessment System (PHAS) and Section Eight Management Assessment Program (SEMAM) assessments.
- (2) **Small PHA** - A PHA that is not designated as PHAS or SEMAM troubled, that owns or manages less than 250 public housing units and any number of vouchers where the total combined units exceed 550.
- (3) **Housing Choice Voucher (HCV) Only PHA** - A PHA that administers more than 550 HCVs, was not designated as troubled in its most recent SEMAM assessment and does not own or manage public housing.
- (4) **Standard PHA** - A PHA that owns or manages 250 or more public housing units and any number of vouchers where the total combined units exceed 550, and that was designated as a standard performer in the most recent PHAS or SEMAM assessments.
- (5) **Troubled PHA** - A PHA that achieves an overall PHAS or SEMAM score of less than 60 percent.
- (6) **Qualified PHA** - A PHA with 550 or fewer public housing dwelling units and/or housing choice vouchers combined and is not PHAS or SEMAM troubled.

A. PHA Information.

PHA Name: Fort Walton Beach Housing Authority PHA Code: FL069
PHA Type: Small

PHA Plan for Fiscal Year Beginning: (MM/YYYY): 07/2024
PHA Inventory (Based on Annual Contributions Contract (ACC) units at time of FY beginning, above)
Number of Public Housing (PH) Units 124 Number of Housing Choice Vouchers (HCVs) 852
Total Combined 976

PHA Plan Submission Type: Annual Submission Revised Annual Submission

Availability of Information. In addition to the items listed in this form, PHAs must have the elements listed below readily available to the public. A PHA must identify the specific location(s) where the proposed PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and proposed PHA Plan are available for inspection by the public. Additionally, the PHA must provide information on how the public may reasonably obtain additional information of the PHA policies contained in the standard Annual Plan but excluded from their streamlined submissions. At a minimum, PHAs must post PHA Plans, including updates, at each Asset Management Project (AMP) and main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official website. PHAs are also encouraged to provide each resident council a copy of their PHA Plans.

How the public can access this PHA Plan: The public will be able to access the annual plan for review, by coming to the Fort Walton Beach Housing Authority's main office and requesting it for review. The PHA Plan will be located in the Operations Director's office and will be readily available for review upon request.

B. **Plan Elements Submitted with 5-Year PHA Plans.** Required elements for Small PHAs completing this document in years in which the 5-Year Plan is also submitted. This section does not need to be completed for years when a Small PHA is not submitting its 5-Year Plan. See sub-section below for required elements in all other years (Years 1-4).

B.1 **Revision of Existing PHA Plan Elements.**
 (a) Have the following PHA Plan elements been revised by the PHA since its last Five-Year PHA Plan submission?
 Y N
 Statement of Housing Needs and Strategy for Addressing Housing Needs.
 Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions.
 Financial Resources.
 Rent Determination.
 Homeownership Programs.
 Substantial Deviation.
 Significant Amendment/Modification

(b) If the PHA answered yes for any element, describe the revisions for each revised element(s):

(c) The PHA must submit its Deconcentration Policy for Field Office review.

B.2 **New Activities.**
 (a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?
 Y N
 Hope VI or Choice Neighborhoods.
 Mixed Finance Modernization or Development.
 Demolition and/or Disposition.
 Conversion of Public Housing to Tenant Based Assistance.
 Conversion of Public Housing to Project-Based Rental Assistance or Project-Based Vouchers under RAD.
 Project Based Vouchers.
 Units with Approved Vacancies for Modernization.
 Other Capital Grant Programs (i.e., Capital Fund Community Facilities Grants or Emergency Safety and Security Grants).

(b) If any of these activities are planned for the current Fiscal Year, describe the activities. For new demolition activities, describe any public housing development or portion thereof, owned by the PHA for which the PHA has applied or will apply for demolition and/or disposition approval under section 18 of the 1937 Act under the separate demolition/disposition approval process. If using Project-Based Vouchers (PBVs), provide the projected number of project-based units and general locations, and describe how project basing would be consistent with the PHA Plan

B.3 **Progress Report.**
 Provide a description of the PHA's progress in meeting its Mission and Goals described in the PHA 5-Year and Annual Plan.

B.4 **Capital Improvements.** Include a reference here to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved.

B.5 Most Recent Fiscal Year Audit.
 (a) Were there any findings in the most recent FY Audit?
 Y N
 (b) If yes, please describe:

Plan Elements Submitted All Other Years (Years 1-4). Required elements for all other fiscal years. This section does not need to be completed in years when a Small PHA is submitting its 5-Year PHA Plan.

B.1 New Activities
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 Y N

- Hope VI or Choice Neighborhoods.
- Mixed Finance Modernization or Development.
- Demolition and/or Disposition.
- Conversion of Public Housing to Tenant-Based Assistance.
- Conversion of Public Housing to Project-Based Assistance under RAD.
- Project Based Vouchers.
- Units with Approved Vacancies for Modernization.
- Other Capital Grant Programs (i.e., Capital Fund Community Facilities Grants or Emergency Safety and Security Grants).

(b) If any of these activities are planned for the current Fiscal Year, describe the activities. For new demolition activities, describe any public housing development or portion thereof, owned by the PHA for which the PHA has applied or will apply for demolition and/or disposition approval under section 18 of the 1937 Act under the separate demolition/disposition approval process.

Mixed Finance Modernization or Development.
 The agency submitted two (2) applications for tax credits in the 2023 fiscal year to redevelop Charlie Hill Terrace, currently a 124-unit public housing development. The 124 units will be replaced in phases through RAD/Section 18 Blend, including RAD/Section 18 Small PHA Blend, or Streamlined Voluntary Conversion (SVC). One application has been funded and the RAD application has been submitted. It is proposed that this phase will impact 12-24 of the current units. The remaining units will be converted in additional phases as funding is received. The redevelopment plan estimates a total of 400 units to replace the 124 units of public housing through 4 phases of development. This will be a mixed income community. These phases will consider RAD, RAD/Section 18 Blend, including RAD/Section 18 Small PHA Blend, and Section 18 and will reposition all of the public housing units. (e) The first phase of redevelopment has been recently funded and we are anticipating a RAD/Section 18 blend, more specifically, possibly a RAD/Section 18 Small PHA Blend, for this first phase. (f) An initial meeting of the residents for this process was held on June 27, 2023. Tenants' rights were discussed and a notice (RIN) was sent out on June 7, 2023 which included the RAD provisions which are attached to this plan and incorporated herein. (g) A second meeting of the residents for this process was held on October 9, 2023. Tenants' rights were discussed and a notice (RIN) was sent out on October 4, 2023 which included the RAD provisions which are attached to this plan and incorporated herein. The initial General Information Notice was sent to all residents on June 7, 2023.

Conversion of Public Housing to Project-Based Assistance under RAD.
 If using Project-Based Vouchers, provide the projected number of project-based units, general locations, and describe how project-basing would be consistent with the PHA Plan. The agency is looking to place a solicitation in the Housing Agency Market Place for Project Based Vouchers (PBV) this fiscal year. The agency sees a need for housing that is affordable to seniors, and estimates that it will be able to provide project-based assistance for up to approximately thirty (30) units of senior housing for families and/or individuals under the PBV program to support the preservation or creation of affordable housing opportunities for seniors and will target existing housing units in the Okaloosa County, Florida community. The agency will be project basing vouchers through a RAD/Section 18 blend, possibly a RAD/Section 18 Small PHA Blend, for the first phase of the redevelopment of Charlie Hill Terrace. The units that are put through Section 18 blend will receive Tenant Protection Vouchers (TPVs) from HUD and we, the PHA, will project-base these TPVs and replace them at the site as non-RAD PBVs at a rent level up to 110% of Fair Market Rent, as published annually by HUD. The units that are put through Section 18 blend will receive Tenant Protection Vouchers (TPVs) from HUD and we, the PHA, will project-base these TPVs and replace them at the site as non-RAD PBVs at a rent level up to 110% of Fair Market Rent, as published annually by HUD.

Project Based Vouchers.
 The agency will be project basing vouchers through a RAD/Section 18 blend, possibly a RAD/Section 18 Small PHA Blend, for the first phase of the redevelopment of Charlie Hill Terrace. The units that are put through Section 18 blend will receive Tenant Protection Vouchers (TPVs) from HUD and we, the PHA, will project-base these TPVs and replace them at the site as non-RAD PBVs at a rent level up to 110% of Fair Market Rent, as published annually by HUD. (k) Additional phases of the redevelopment of Charlie Hill Terrace will be considered for project basing vouchers either through a RAD/Section 18 blend or through Section 18 once funding has been received. Applications for funding are being submitted for the additional phases.
 (c) If using Project-Based Vouchers, provide the projected number of project-based units, general locations, and describe how project-basing would be consistent with the PHA Plan.
 Project Based Vouchers.

(i) The agency is looking to place a solicitation in the Housing Agency Market Place for Project Based Vouchers (PBV) this fiscal year. The agency sees a need for housing that is affordable to seniors, and estimates that it will be able to provide project-based assistance for up to approximately thirty (30) units of senior housing for families and/or individuals under the PBV program to support the preservation or creation of affordable housing opportunities for seniors and will target existing housing units in the Okaloosa County, Florida community. (j) The agency will be project basing vouchers through a RAD/Section 18 blend, possibly a RAD/Section 18 Small PHA Blend, for the first phase of the redevelopment of Charlie Hill Terrace. The units that are put through Section 18 blend will receive Tenant Protection Vouchers (TPVs) from HUD and we, the PHA, will project-base these TPVs and replace them at the site as non-RAD PBVs at a rent level up to 110% of Fair Market Rent, as published annually by HUD. (k) Additional phases of the redevelopment of Charlie Hill Terrace will be considered for project basing vouchers either through a RAD/Section 18 blend or through Section 18 once funding has been received. Applications for funding are being submitted for the additional phases.

(d) The PHA must submit its Deconcentration Policy for Field Office Review.

B.2 Capital Improvements Include a reference here to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved.
 See Capital Fund 5 Year Action Plan in EPIC approved by HUD on 02/05/2024

C. Other Document or Certification Requirements for Annual Plan Submissions. Required in all submission years.

<p>C.1</p> <p>Resident Advisory Board (RAB) Comments.</p> <p>(a) Did the RAB(s) have comments to the PHA Plan? <input type="checkbox"/> Y <input checked="" type="checkbox"/> N</p> <p>(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations. A meeting was held for all residents on 01/16/2024.</p>	
<p>C.2</p> <p>Certification by State or Local Officials.</p> <p>Form HUD-50077-SL, Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>	
<p>C.3</p> <p>Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.</p> <p>Form HUD-50077-CRT-SM, PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed, must be submitted by the PHA as an electronic attachment to the PHA Plan</p>	
<p>C.4</p> <p>Challenged Elements. If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.</p> <p>(a) Did the public challenge any elements of the Plan? <input type="checkbox"/> Y <input checked="" type="checkbox"/> N</p> <p>If yes, include Challenged Elements.</p>	
<p>D.</p> <p>Affirmatively Furthering Fair Housing (AFFH).</p>	
<p>D.1</p> <p>Affirmatively Furthering Fair Housing (AFFH).</p> <p>Provide a statement of the PHA's strategies and actions to achieve fair housing goals outlined in an accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5). Use the chart provided below. (PHAs should add as many goals as necessary to overcome fair housing issues and contributing factors.) Until such time as the PHA is required to submit an AFH, the PHA is not obligated to complete this chart. The PHA will fulfill, nevertheless, the requirements at 24 CFR § 903.7(o) enacted prior to August 17, 2015. See Instructions for further detail on completing this item.</p>	

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