



FYB 2019 ANNUAL PLAN

B.	Annual Plan Elements
B.1	<p>Revision of PHA Plan Elements.</p> <p>(a) Have the following PHA Plan elements been revised by the PHA?</p> <p>Y N</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Statement of Housing Needs and Strategy for Addressing Housing Needs</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Financial Resources.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Rent Determination.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Operation and Management.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Grievance Procedures.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Homeownership Programs.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Community Service and Self-Sufficiency Programs.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Safety and Crime Prevention.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Pet Policy.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Asset Management.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Substantial Deviation.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Significant Amendment/Modification</p> <p>(b) If the PHA answered yes for any element, describe the revisions for each revised element(s):</p> <p>The Montgomery Housing Authority (MHA) Public Housing will make the following revisions to the PHA Plan Elements:</p> <ol style="list-style-type: none"> Financial Resources is expected to reflect the utilization of approximately \$10,529,633, due primarily to obligating \$2,692,374 Replacement Housing Funds and \$837,259 Capital Funds to the Columbus Square Phase I mixed finance development and using \$7,000,000 in Reserves through an Operating Fund Financing Program (OFFP) if approved by HUD for completion of The Plaza at Centennial Hill Phase III. <p>(c) The PHA must submit its Deconcentration Policy for Field Office review.</p> <p>If subject to deconcentration requirements, MHA or Mixed-Finance Owner will consider its deconcentration goals when transfer units are offered. When feasible, families above the Established Income Range will be offered a unit in a development that is below the Established Income Range, and vice versa, to achieve MHA or Mixed-Finance Owner's deconcentration goals. A deconcentration offer will be considered a "bonus" offer; that is, if a resident refuses a deconcentration offer, the resident will receive one additional transfer offer.</p>
B.2	<p>New Activities.</p> <p>(a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?</p> <p>Y N</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Hope VI or Choice Neighborhoods.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Mixed Finance Modernization or Development.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Demolition and/or Disposition.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Designated Housing for Elderly and/or Disabled Families.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Conversion of Public Housing to Tenant-Based Assistance.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Conversion of Public Housing to Project-Based Assistance under RAD.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Occupancy by Over-Income Families.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Occupancy by Police Officers.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Non-Smoking Policies.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Project-Based Vouchers.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Units with Approved Vacancies for Modernization.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Other Capital Grant Programs (i.e., Capital Fund Community Facilities Grants or Emergency Safety and Security Grants).</p> <p>(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.</p> <ol style="list-style-type: none"> MHA's developer partner was awarded 9% tax credits in 2017 for Columbus Square Phase II. The closing is scheduled for early 2018. MHA has submitted a demolition application to demolish ninety-four (94) dwelling units and two (2) non-dwelling units, in the Smiley Court development. HUD has approved the said Smiley Ct demolition application. Resident relocation is expected to be completed during the upcoming year and demolition activities are expected to commence. MHA has submitted disposition amendments of the former Tulane Courts and the former Trenholm Courts for development activities. MHA may seek approval for the demolition/disposition of Patterson Courts. Other efforts currently under review include project-basing vouchers under the Housing Choice Voucher program, in conjunction with property acquisitions and new construction efforts to increase the supply of affordable housing in Montgomery. These efforts may also include joint partnerships with the private sector to the extent such partnerships would benefit the MHA and create additional revenue streams for the agency. MHA will apply for Emergency Safety and Security Grants.
B.3	<p>Civil Rights Certification.</p> <p>Form HUD-50077, <i>PHA Certifications of Compliance with the PHA Plans and Related Regulations</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>

B.4	<p>Most Recent Fiscal Year Audit.</p> <p>(a) Were there any findings in the most recent FY Audit?</p> <p>Y N <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>(b) If yes, please describe:</p>
B.5	<p>Progress Report.</p> <p>Provide a description of the PHA's progress in meeting its Mission and Goals described in the PHA 5-Year and Annual Plan.</p>
B.6	<p>Resident Advisory Board (RAB) Comments.</p> <p>(a) Did the RAB(s) provide comments to the PHA Plan?</p> <p>Y N <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>(c) 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.</p>
B.7	<p>Certification by State or Local Officials.</p> <p>Form HUD 50077-SL, <i>Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>
B.8	<p>Troubled PHA.</p> <p>(a) Does the PHA have any current Memorandum of Agreement, Performance Improvement Plan, or Recovery Plan in place?</p> <p>Y N N/A <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>(b) If yes, please describe:</p>
C.	<p>Statement of Capital Improvements. Required for all PHAs completing this form that administer public housing and receive funding from the Capital Fund Program (CFP).</p>
C.1	<p>Capital Improvements. Include a reference here to the most recent HUD-approved 5-Year Action Plan (HUD-50075.2) and the date that it was approved by HUD.</p> <p>MHA has prepared and submitted a 5 Year Action Plan (HUD-50075.2) in EPIC on February 12, 2018. The action plan was approved by HUD on June 13, 2018.</p>



FYB 2019 5-YEAR PLAN

The Montgomery Housing Authority's 5-Year Plan FYB 04/01/2019	U.S. Department of Housing and Urban Development Office of Public and Indian Housing	OMB No. 2577-0226 Expires: 02/29/2016
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A.	PHA Information.																																																														
A.1	<p>PHA Name: Montgomery Housing Authority PHA Code: AL006</p> <p>PHA Plan for Fiscal Year Beginning: (MM/YYYY): 04/2019</p> <p>PHA Plan Submission Type: <input checked="" type="checkbox"/> 5-Year Plan Submission <input type="checkbox"/> Revised 5-Year Plan Submission</p> <p>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 on 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 websites. PHAs are also encouraged to provide each resident council a copy of their PHA Plans.</p> <p>The Montgomery Housing Authority (MHA) Annual Plan is provided for public view on our website www.mhatoday.org and at the following locations:</p> <table border="1"> <thead> <tr> <th>AMP NUMBER</th> <th>PROPERTY NAME</th> <th>PROPERTY ADDRESS</th> </tr> </thead> <tbody> <tr> <td>Main Office</td> <td>MHA Central Office</td> <td>525 S. Lawrence Street, Montgomery, AL 36104</td> </tr> <tr> <td>AL006000002</td> <td>Parks Place</td> <td>1026 Rosa Parks Avenue Montgomery, AL 36108</td> </tr> <tr> <td>AL006000004</td> <td>Paterson Court</td> <td>609 Winnie Street Montgomery, AL 36104</td> </tr> <tr> <td>AL006000006</td> <td>Gibbs Village East</td> <td>1701 Terminal Road Montgomery, AL 36108</td> </tr> <tr> <td>AL006000007</td> <td>Gibbs Village West</td> <td>2025 Terminal Road Montgomery, AL 36108</td> </tr> <tr> <td>AL006000008</td> <td>Smiley Court</td> <td>4103 Marlyn Street Montgomery, AL 36108</td> </tr> <tr> <td>AL006000009</td> <td>The Terrace</td> <td>1301 Adams Avenue Montgomery, AL 36104</td> </tr> <tr> <td>AL006000012</td> <td>The Plaza at Centennial Hill I</td> <td>515 Percy Drive Montgomery, AL 36104</td> </tr> <tr> <td>AL006000013</td> <td>The Plaza at Centennial Hill II</td> <td>515 Percy Drive Montgomery, AL 36104</td> </tr> <tr> <td>AL006000014</td> <td>Columbus Square I</td> <td>645 Columbus Street Montgomery, AL 36104</td> </tr> <tr> <td>AL006000015</td> <td>Columbus Square II</td> <td>645 Columbus Street Montgomery, AL 36104</td> </tr> </tbody> </table> <p><input type="checkbox"/> PHA Consortia: (Check box if submitting a Joint PHA Plan and complete table below)</p> <table border="1"> <thead> <tr> <th rowspan="2">Participating PHAs</th> <th rowspan="2">PHA Code</th> <th rowspan="2">Program(s) in the Consortia</th> <th rowspan="2">Program(s) not in the Consortia</th> <th colspan="2">No. of Units in Each Program</th> </tr> <tr> <th>PH</th> <th>HCV</th> </tr> </thead> <tbody> <tr> <td>Lead PHA:</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	AMP NUMBER	PROPERTY NAME	PROPERTY ADDRESS	Main Office	MHA Central Office	525 S. Lawrence Street, Montgomery, AL 36104	AL006000002	Parks Place	1026 Rosa Parks Avenue Montgomery, AL 36108	AL006000004	Paterson Court	609 Winnie Street Montgomery, AL 36104	AL006000006	Gibbs Village East	1701 Terminal Road Montgomery, AL 36108	AL006000007	Gibbs Village West	2025 Terminal Road Montgomery, AL 36108	AL006000008	Smiley Court	4103 Marlyn Street Montgomery, AL 36108	AL006000009	The Terrace	1301 Adams Avenue Montgomery, AL 36104	AL006000012	The Plaza at Centennial Hill I	515 Percy Drive Montgomery, AL 36104	AL006000013	The Plaza at Centennial Hill II	515 Percy Drive Montgomery, AL 36104	AL006000014	Columbus Square I	645 Columbus Street Montgomery, AL 36104	AL006000015	Columbus Square II	645 Columbus Street Montgomery, AL 36104	Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program		PH	HCV	Lead PHA:																	
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B.	5-Year Plan. Required for <u>all</u> PHAs completing this form.
B.1	<p>Mission. State the PHA's mission for serving the needs of low- income, very low- income, and extremely low- income families in the MHA's jurisdiction for the next five years.</p> <p>The mission of the Montgomery Housing Authority (MHA) is to create affordable, sustainable housing while improving the quality of life for families and encouraging independence.</p> <p>In order to achieve this mission, the MHA will:</p> <p>1. Neighborhood Transformation</p> <p>Maintain, develop and increase quality affordable housing through rehabilitation, redevelopment and acquisition, in partnership with private developers, financial institutions and governmental agencies. Outcomes: (a) complete construction of Phases I and II Columbus Square; (b) remaster and finalize plan for Phase III of The Plaza at Centennial Hill and Phase III of Columbus Square; incorporate the former Lister Hill clinic and adjacent parcels; (c) create community space for the residents at Parks Place to include a management office and community resource center as well as a mini interpretative center; (d) reposition Paterson and Smiley Courts through acquisition/rehabilitation; new development using LIHTC (and any proceeds); rental assistance demonstration (RAD), where appropriate, and (e) implement the plan for offsite lease/purchase through developing new infill housing.</p> <p>2. Create Administrative Efficiency while Enhancing the Customer Experience</p> <p>Streamline business processing to maximize efficiency in the workforce and improve interaction with customers. Outcomes: (a) reduce paper and package usage by creating electronic files and transmitting information electronically including Board packets; (b) provide various electronic means by which residents/participants can place service requests, receive official letters/documents and pay rent/other charges; (c) implement remote re-certifications; (d) link telephone system with software (telephone number will link to a record that will automatically display on the computer screens).</p> <p>3. Promote Fair Housing and Deconcentration</p> <p>Ensure that the MHA's portfolio is in compliance with prevailing laws and encourage mobility through housing programs and redevelopment activities. Outcomes: (a) propose a city ordinance requiring new multi-family developers to earmark a percentage of dwellings for low-income families—inclusionary zoning; (b) land bank future development sites in non-impacted census track areas; (c) increase the number of underrepresented families in both the Housing Choice Voucher and Public Housing programs.</p> <p>4. Economic Self-Sufficiency Opportunities</p> <p>Create economic independence opportunities, through workforce development training and education learning opportunities that will mirror the skill-set that is needed for local industries; bridge residents/participants to technical schools or other higher learning institutions. Outcomes: (a) placements to employers who rely on local workforce; (b) increase the number of families participating in the Housing Choice Voucher home ownership program; (c) increase the number of MHA residents participating in section 3 for MHA sponsored construction activities; (d) establish relationship with banks who will offer incentivized savings programs and mortgage loans.</p> <p>5. Expand and Improve Affordable Housing</p> <p>Create and take advantage of opportunities to leverage resources to build, acquire/renovate, and rehabilitate new affordable housing. Outcomes: (a) reposition Paterson and Smiley Courts using proceeds from sale; low income housing tax credits and capital/operating reserves; (b) utilize HCV vouchers (received as a result of demolition activities) for PBV activities; (c) launch not-for-profit arm; (d) and if applicable, explore mixed-used models for future development.</p> <p>6. Image Transformation-Anchor the Message – MHA properties are Communities of Choice</p> <p>Develop vehicles that provide the public with information on existing, ongoing and upcoming initiatives. Outcomes: (a) update website with real time interactive icons; (b) utilize Facebook and twitter to communicate initiatives or feature stories; (c) participate in local apartment associations and neighborhood association meetings; (d) improved public image; (e) production of publication materials including in Annual Report and electronic newsletter; (f) expand partnerships, and create signature programs.</p>

B.2	<p>Goals and Objectives. Identify the PHA's quantifiable goals and objectives that will enable the PHA to serve the needs of low- income, very low-income, and extremely low- income families for the next five years.</p>
B.3	<p>Progress Report. Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5-Year Plan.</p>
B.4	<p>Violence Against Women Act (VAWA) Goals. Provide a statement of the PHA's goals, activities objectives, policies, or programs that will enable the PHA to serve the needs of child and adult victims of domestic violence, dating violence, sexual assault, or stalking.</p> <p>MHA will continue to comply with all requirements of HUD's VAWA and its amendments. Public Housing residents are briefed on the VAWA Policy and Lease Addendum at the time of lease-up. MHA will refer Public Housing residents impacted by VAWA to the local Sunshine Center for counseling assistance and will seek additional community partnerships to provide services to the families affected by domestic violence.</p>
B.5	<p>Significant Amendment or Modification. Provide a statement on the criteria used for determining a significant amendment or modification to the 5-Year Plan.</p> <p>DEFINITION OF "SIGNIFICANT AMENDMENT OR MODIFICATION"</p> <p>MHA defines "significant amendment or modification" as changes in its plans or policies which fundamentally alter the mission, goals or objectives of the Agency.</p> <p>Changes made to the Plan, or any component thereof, that do not relate to the above-mentioned definition will not be considered "substantial" or "significant" and will not require public notice or comment.</p>
B.6	<p>Resident Advisory Board (RAB) Comments.</p> <p>(a) Did the RAB(s) provide comments to the 5-Year PHA Plan?</p> <p>Y N <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>(b) If yes, comments must be submitted by the PHA as an attachment to the 5-Year PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations.</p>
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FYB 2019 GOAL and OBJECTIVES

Goals and Objectives

Improve Public Housing Operations

Achieve higher performance status under the PHAS (or HUD equivalent) program:

Objectives:

- Maintain vacancy rate of 2% or less
- Reduce unit turnaround time to 10 days
- Ensure that all indicators are performed consistent with high-performance criteria
- Complete emergency work orders within 24 hours
- Complete routine work orders within 1 day

Improve the quality of life of residents in all communities:

Objectives:

- Upgrade curb appeal (mini-blinds, paint, landscaping, etc.)
- Improve common areas
- Install additional security and safety measures
- Upgrade the dwelling unit's interior and exterior

Develop and implement more efficient and convenient ways for residents to pay rent, using technology (i.e. web portals, telephones and/or electronic funds transfer (EFT)) :

Objectives:

- Improve Rent Collection
- Improve Customer Service
- Eliminate Costly Business Processes

Improve customer service:

Objectives:

- Utilize technology for communication
- Reduce resident complaints
- Improve resident participation in activities (incentivize meetings)

Develop and implement an asset management protocol in order to routinely measure performance in management indicators at the Plaza at Centennial Hill and Columbus Square:

Objectives:

- Collect rent above HUD requirements
- Maintain vacancy rate and vacancy turnaround, consistent with metrics for traditional public housing (vacancy rate 2% or less, turnaround time 10 days or less)
- Ensure expenses do not exceed revenue
- Review annual budgets
- Ensure units are inspected using UPCS/HQS guidelines annually
- Audit 5% of files each month, to full ensure compliance

Develop and implement an affirmative marketing plan to reach under-represented groups and translate marketing material in languages, as needed:

Objectives:

Goals and Objectives

- Increase participation of underrepresented groups in all housing programs
- Increase presence in underrepresented communities

Decrease crime in all public housing communities:

Objectives:

- Continue to encourage residents to use established methods for confidentially reporting unlawful activities
- Increase participation in joint meetings with police department
- Continue to monitor surveillance activity during and after business hours
- Continue to employ after hour security in needed public housing properties

Develop a new public housing orientation package; consider brochure and tenant orientation, as up-loadable video to a website:

Objectives:

- Inform the public of available affordable housing resources
- Display materials to project a positive image of affordable housing communities

Streamline business processes by utilizing technology—paperless communication where applicable:

Objectives:

- Continue to store files and related documents electronically
- Engage participants to access and utilize online systems (i.e., placing work orders) with a goal of at least 80% or more clients utilizing online work order system by FYE 2019
- Fully utilize software to track inventory and train staff
- Evaluate staffing needs and realign, where necessary

Create an environment of thriving professional workforce

Objectives:

- Reduce staff turnover
- Maintain trained and certified staff
- Motivate staff to seek and adopt best practices
- Reduce the need of external resources

Improve Housing Choice Voucher (HCV) Operations

Achieve higher performance status under SEMAP (or HUD equivalent) program:

Objectives:

- Ensure that all indicators are performed consistent with high-performance criteria
- Self-assess program monthly and make adjust as necessary, to ensure optimal performance
- Ensure units are inspected at least once annually, and re-inspections conducted within 28-days of failure

Streamline business process to create effective and efficient program administration, including outsourcing some or all HCV business operations:

Objectives:

Goals and Objectives

- Reduce overpayments and errors
- Optimize the utilization of automated management reports
- Adopt policies that will allow two-year re-certifications, for families on fixed income, and allow remote re-certifications for the entire program
- Review budget, to ensure management improvements are funded

Obtain zero independents audit findings:

Objectives:

- No more than 2% of the files, reviewed by the independent auditors, have findings
- Supervisory staff will audit no less than 5% of tenant files using an approved protocol
- Ensure that staff is fully trained on policies and Standard Operating Procedures (SOPs), consistent with best practices

Improve customer service:

Objectives:

- Respond to all (internal & external) inquiries the same day they are received
- Obtain ongoing customer service training
- Host quarterly landlord meetings, and partner with stakeholders (i.e., Veteran's Administration and Alabama Real Estate Association)
- Implement customer service satisfaction survey
- Develop strategies to minimize payable discrepancies

Optimize Management (and HUD) reports to ensure that the program resources are being optimized and/ or utilized, within the budget authority

Objectives:

- Maintain a funding utilization rate of 98% or better
- Ensure that units are not placed "on-hold" for more than 180 days
- Ensure that program voucher utilization is at 97% or better

Develop and implement an affirmative marketing plan to reach underrepresented groups and translate marketing material in languages, as needed:

Objectives:

- Expand PBV program, to underrepresented areas
- Increase participation of underrepresented groups, in all housing programs
- Increase presence in underrepresented communities
- Promote fair housing and equal opportunity

Rebrand the HCV Program by developing a new HCV orientation package to include an electronic brochure and tenant orientation video to website:

Objectives:

- Inform the public of available affordable housing resources
- Display materials, to project a positive image of affordable housing communities
- Establish visibility, in the broader community by actively participating in local professional organizations (i.e., Montgomery Apartment Association)

Goals and Objectives

Streamline business processes by utilizing technology paperless communication where applicable:

Objectives:

- Fully utilize software, train staff accordingly
- Evaluate Staffing needs, realign where necessary
- Adopt policies that will allow two-year re-certifications for families on fixed income and allow remote re-certifications for the program

VAWA provide current information to all Housing Choice Voucher (HCV) participants:

Objectives:

- Provide recent information at incoming portability briefings, initial briefing and annual briefing

Train and cross-train staff

Objectives:

- Minimize the need for outside contractors
- Improve Housing Choice Voucher and Public Housing operations (i.e., workforce development)

Create and promote economic self-sufficiency opportunities through Homeownership programs and community partnerships

Objectives:

- Increase the number of families participating in the HCV Homeownership Program
- Increase the number of families participating in the HCV Family Self-Sufficiency program
- Forge relationships with higher learning institutions and technical schools

Ensure that properties on the program comply with HQS, neighborhood and local building codes

Objectives:

- Ensure that families are living in decent, safe communities and dwellings
- Deconcentrate poverty

Increase Customer Satisfaction

Objectives:

- Continue to enhance customer service, by consistently reviewing established protocol
- Improve routine work orders and reduce turnaround time to three days (maximum)
- Respond to internal and external inquiries within 24 hours
- Improve the curb appeal of all communities
- Continue customer service training sessions for employees
- Review internal controls to improve the delivery of services to our constituents
- Promote excellence by exceeding standards
- Conduct monthly community and RAB meetings to enable MHA to communicate the goals and directives of the MHA to its residents
- Install Kiosk in main lobby to automate service
- Implement telephone tracking system software

Goals and Objectives

Improve Financial Health of the MHA

Objectives:

- Develop five year forecasting tool for construction, acquisition and redevelopment of public housing units in connection with the Real Estate Department
- Automate financial reporting to improve effectiveness and efficiency
- Streamline accounts payable process to include 90% electronic payments to vendors and automate approval of vendor payment
- Equip staff with functional training related to their respective areas
- Revise standard operating procedures and streamline document retention

Improve Procurement Operations

Objectives:

- Automate and streamline procurement/contract processes, to include a qualified vendor listing of pre-negotiated prices for trades services
- Coordinate with local organizations to improve minority participation involvement in trade service workshops
- Implement E-Procurement and work with companies to increase participation
- Increase Section 3 participation
- Conduct minority-owned business workshops
- Implement electronic inventory module in Yardi
- Strive to maintain 100% inventory accuracy

Enhance Information Technology

Objectives:

- Continue to enhance the functionality and informative appeal of the website (quarterly)
- Improve communication technology both internal and external
- Organize electronic filing system
- Continue to improve technology to enhance business objectives
- Implement web-based and telephone software to receive payments from residents
- Develop internal controls to improve the efficiency of security cameras, agency-wide, and implement a protocol, to include 24-hour response time, for any defective equipment
- Create dashboards for real-time metrics in all program areas
- Automate the Payables process
- Redevelop website to accept rent payments

Human Resources

Objectives:

- Continue to standardize human resources management practices in the areas of hiring, retention, employee development, benefits, testing, and compliance with federal, state and local regulations
- Implement outreach efforts to reach a diverse group of competent workers when recruiting for vacancies

Goals and Objectives

- Implement leadership training to promote a positive company culture, sense of belonging, empower, inspire, and drive overall goals and objectives of MHA
- Continue Customer Service Training to ensure high levels of customer service
- Establish employee satisfaction surveys to understand areas of concern and develop practices/processes to tackle core issues
- Administer MHA Intern Program
- Diversify recruiting methods
- Revamp employee recognition ceremony
- Recognize birthdays and work anniversaries monthly
- Explore cost savings on benefits plans
- Establish partnerships with local business partners to offer discounts to MHA employees (no cost associated)
- Implement online onboarding process
- Implement annual online election
- Coordinate annual fair housing training
- Refine Strategic Plan
- Explore cost savings for commercial and group insurance
- Conduct yearly driver's license checks for the auto insurance policy
- Ensure that HAI identified deficiencies are corrected within 30 days after being identified
- Develop a strategy to promote workplace diversity
- Minimize agency risk and exposure
- Improve public image of MHA through networking opportunities
- Develop staff/compensatory retention plan to recruit top talents

Engage in a Number of Real Estate Activities to Improve Inventory

Reposition asserts to create viable and sustainable communities.

Objectives:

- Eliminate blight
- Improve the quality of life
- Create a valuable resource for community and city

Redevelop Phase II of Columbus Square

Objectives:

- Create viable and sustainable rental dwellings units
- Create a critical mass that will spawn economic development
- Eliminate blight
- Create a sound foundation for low-income families.

Strategically acquire real estate parcels augment current redevelopment or renovation projects

Objectives:

- Stabilize community, eliminate blighted structures surrounding the area
- Provide additional amenities (i.e., parking)
- Incorporate the "Lister Hill" parcel as a part of Phase III

Goals and Objectives

- Incorporate the Angelica lot with ADEM remediations as a part of Phase III

Re-master plan and self-develop Phase III of the Plaza at Centennial Hill

Objectives:

- Engage the business community to spawn economic development along Adams Avenue
- Create viable and sustainable rental dwelling units
- Create a critical mass that will generate economic development
- Eliminate blight
- Create a sound foundation for low-income families

Demolish unsafe structures at Smiley and Redevelop Off-Site

Objectives:

- Remove/eliminate safety hazards
- Obtain vouchers for lost inventory
- Obtain replacement housing funds for lost inventory
- Issue RFP for private developer partner to redevelop

Reposition Patterson Courts

Objectives:

- Issue RFP for private developer partner to redevelop Patterson Court off-site locations through new construction and/or acquisition/ rehab approach
- Potentially submit demolition and/or disposition application for Patterson Courts contingent upon the outcome of master planning efforts

Create community amenities for Parks Place

Objectives:

- Demolish existing management office building and community center
- Create state of the art playground area
- Identify opportunity to incorporate Pre-K classroom within the community center

Reposition/Redevelop of non-performing assets (Cedar Park) and structurally damaged units at Smiley

Objectives:

- Remove unsafe blighted structures
- Reposition assets that are not performing or not being used for redevelopment

Provide replacement Public Housing

Objectives:

- Redevelop former Trenholm site to a multi-phase affordable housing community using available resources including LIHTC, RHF, and grants
- Develop in-fill housing (for lease/purchase) adjacent to new development

Goals and Objectives

- Identify and secure acquisitions that can be converted to the public housing using the U.S. Department of Housing and Urban Development *Site and Neighborhood Standards*
- Develop additional 40 public housing units at The Plaza at Centennial Hill Phase III with a preference for veterans
- Update 5-year financial plan, identifying sources and uses

Ensure all properties and dwelling units (where applicable) comply with governing accessibility

Objectives:

- Ensure designated units comply with the 504 accessibility requirements through assessments
- Develop 5-year plan to address the deficit in the 504 accessibility requirements

Ensure that grant funds, and HUD reports are prepared consistent with its respective requirements

- Ensure that grant funds are obligated and expended in accordance with HUD guidelines
- Ensure that grant funds are obligated and expended in a manner that allows the maximum points under the PHAS program

Renovate or Modernize Public Housing Units

Objectives:

- Continue to oversee the comprehensive rehabilitation of Cleveland Court
- Conduct a physical needs assessment to evaluate the conditions of each property
- Reposition of Paterson Court Community

Demolish or Dispose of Obsolete Public Housing

Objectives:

- Demolition of all buildings at Smiley Court due to structural damage
- Review the feasibility of Patterson Courts demolition and disposition and submit an application if appropriate
- Determine the feasibility of developing a community resource at Parks Place, to honor former resident Ms. Rosa Parks, a civil rights leader and national icon, by converting nine public housing units

Provide Replacement Public Housing

Objectives:

- Acquire existing developments to rehabilitate and replace demolished public housing units
- Establish site-based waiting list for public housing
- Issue a RFP to redevelop Smiley Court and/or Patterson Court at multiple off-site locations through new construction and/or acquisition/rehab approach

Goals and Objectives

- Identify in-fill lots and/or distressed homes in the Centennial Hill neighborhood for acquisition and redevelopment of homeownership opportunities through a lease/purchase program
- Identify other acquisition and development of in-fill lots
- Acquire existing multi-family developments that are nearing the end of their compliance period

Increase Assisted Housing Choices

Objectives:

- Provide voucher mobility counseling to all eligible HCV program recipients. (New admissions, relocations, transfers and portability participants will be briefed at the time of voucher issuance.)
- Conduct outreach efforts to recruit potential HCV landlords
- Continue to host workshops to educate and familiarize potential landlords and update existing landlords on the HCV program
- Monitor HCV Homeownership, Veteran Assistance Supportive Housing (VASH) and Non-Elderly Disabled (NED) programs for regulatory compliance
- Expand housing opportunities through PBV

Provide an Improved Living Environment for Public Housing Communities

Objectives:

- Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments through activity policies
- Develop an e-newsletter that will be informative and includes resident families and community events.
- Continue to make periodic presentations to civic groups and neighborhood associations to explain the programs of the MHA
- Link residents with supportive services to address their needs
- Limit ingress and egress at all developments
- Continue working with the Montgomery Police Department (MPD) to improve response time and expand policing
- Increase and improve common area lighting in all housing communities
- Conduct periodic lighting surveys to determine the adequacy of public lighting and replace as needed
- Enforce screening and eviction policies

Promote Self-Sufficiency and Asset Development of Assisted Households

Objectives:

- Increase program interest by including information in the new admission and transfer briefings by organizing FSS orientations at public housing community centers
- Present both FSS and HCV Homeownership information during new admission and relocation briefings
- Host monthly financial literacy and credit repair seminars presented by BBVA Compass Bank, FDIC, Regions, Trustmark, and BB&T

Goals and Objectives

- Present Homeownership seminars from local mortgage companies and local realtors, to encourage future homeownership opportunities and participation in the HCV Homeownership program
- Enroll 20 families participating in the HCV homeownership program with at least 5 obtaining a home
- Increase participation by 10% in FSS programs; 10% with escrow accounts
- Distribute job opportunities monthly to residents who are unemployed or underemployed and assist families who are in violation of the work activity policy, find jobs within 6 months
- Schedule Job Ready Workshops and increase the number of families employed from the previous fiscal year by 10%
- Assist residents interested in entrepreneurial activities
- Increase the number of persons receiving a GED and post-secondary/technical school degree by 10%
- Create an apprenticeship program

Equal Opportunity and Affirmatively Further Fair Housing Statement

The Authority affirmatively furthers Fair Housing in the administration of the program by complying fully with all Federal, State and local nondiscrimination laws and administers programs in accordance with the rules and regulations governing Fair Housing and Equal Opportunity in housing, and marketing the program to members of protected classes who are “least likely to apply”.

The Authority shall not discriminate against any applicant, participant, or landlord because of race, color, national or ethnic origin or ancestry, religion, sex, age, familial status, marital status, parental status, sexual orientation, military status or disability is a fundamental policy of the Montgomery Housing Authority.

The MHA is committed to diligence in assuring equal housing opportunities and non-discrimination in all aspects of its housing activities. MHA has embraced an ethical as well as the legal imperative to aggressively ensure that MHA's housing programs comply fully with all local, state and federal fair housing laws including, the Fair Housing Act of 1968, as amended (Fair Housing Act) and its implementing regulations. Additionally, the MHA is implementing several special initiatives to affirmatively further fair housing as required by Section 808(c)(5) of the Fair Housing Act. These efforts to affirmatively further fair housing include promoting the de-concentration of poverty, income-mixing, and opportunities for families to live in the various diverse communities in the City of Montgomery.



FYB 2019 PROGRESS REPORT

PROGRESS REPORT

Expansion of supply

Progress:

- The master plan for The Plaza at Centennial Hill Phase III, including the Lister Hill and another potential future acquisition parcel, Angelica lot, was completed in 2017. The Plaza at Centennial Hill Phase III is being master planned to include additional public housing units with a preference for veterans.
- Construction Documents are being prepared for the construction of an additional 40 public units at The Plaza at Centennial Hill Phase III.
- The primary source of funding for The Plaza at Centennial Phase III will be MHA's excess operating reserves through HUD's OFFP (Operating Funding Financing Program).
- MHA is seeking additional resources for the development of Plaza Phase III, which may include National Housing Trust Fund (NHTF) from Alabama Housing Finance Authority (AHFA) and /or City funds for infrastructure.
- MHA's developer partner, Norstar, has received a 9% tax credit allocation for the revitalization of Trenholm Court. The Columbus Square Phase I mixed-finance transaction is closing took place in June 2016. Construction has started on Phase I which will comprised of 80 units; 10 of those units are will be public housing units. Construction is scheduled to be completed by was completed in December 2017. The development is now fully occupied.
- MHA's developer partner, Norstar, has also received a 9% tax credit allocation for the revitalization of Trenholm Court-Columbus Square Phase 2. The mixed-finance closing occurred in June 2018. Phase 2 will be comprised of 80 more affordable housing units; 2025 of those will be public housing units.
- MHA issued a RFP for Co-developer services in 2018 with a primary focus to redevelop Smiley Court and Patterson Court at multiple off-site locations in the near future. MHA intends to select a private developer partner by December 2018 for these redevelopment efforts. This co-developer RFP will also allow MHA to redevelop other potential sites as well.

Quality of Assisted Housing, to include management of Public Housing and Housing Management of Public Housing

Progress:

- MHA will implement site-based waiting list at select public housing communities;
- MHA continues to maintain its high performer designation status in the public housing program.
- MHA contracted with a private management company to conduct annual inspections of all of its public housing units, using HUD-approved UPCS protocol. This continues to lead to significant increases in physical inspection scores for all public housing sites.
- The regularity of housekeeping inspections and grounds inspections has increased. This has enabled management to prevent severe damages to units.
- MHA has implemented an online work order system for residents.
- MHA has installed surveillance cameras to improve safety in the public housing communities.
- MHA continues its collaboration with the local law enforcement. MPD provides weekly walk-throughs with management and attends monthly community meetings. MHA has contracted off-duty MPD officers to provide security in select public housing properties.
- MHA Continues to utilize the point of sale machines in public housing communities;
- MHA has implemented online payments for residents to pay their account balances.

- MHA continues to encourage the use of email addresses and cell phone numbers to improve communication with public housing residents and applicants.
- MHA continues to enforce the Smoke-Free Policy at Public Housing communities.
- MHA continues to utilize the online public housing and assisted housing application and is in the process of implementing online certification processes.

Customer Satisfaction

Progress:

- MHA is, through the use of its website and virtual community networks, providing increased opportunities for customers to provide us with timely feedback.
- Specific Management functions, in addition to those referenced above, including Customer Service training semi-annually for all HCV staff members.
- Online application submittal when the waiting list is open.

Finance

Progress:

- Streamlined accounts payables process with automatic approval and invoice tracking and matching to purchase orders.
- An implemented process to receive online payments from residents for rent and other tenant-related charges.
- Increased training for staff through webinars and online classrooms for more efficient results.
- Improved accounting processes by developing more analytical reviews to align with month end reporting.
- Achieved budgetary goals through increased communication with procurement and other areas to maintain costs.

Procurement

Progress:

- Adopted an electronic procurement system to streamline operations and ensure compliance with the complex HUD procurement guidelines.
- Implemented electronic Inventory system, and the management team trained adequately in accounting for inventory in the database.

Modernization/Development

Progress:

- Demolition of management/maintenance building will be completed in 2019.
- Demolition of the community building at Parks Place is completed. Construction of an administration building, which will house management office staff and Resident Services, will be completed in 2018.
- New landscaping and site improvements have achieved substantial completion at Parks Place.
- Receipt of 9% LIHTC for Columbus Square II (formerly Trenholm Court).
- MHA has implemented some energy-saving measures, identified in the most recent Energy Audit.
- Modernization of nine units in Parks Place has reached substantial completion and will be occupied by

Housing Choice Voucher (HCV) Program

Progress:

- MHA continues to organize public workshops and highlight the virtues of the HCV program to increase the level of participation.
- Use virtual community networks and the MHA website to alert stakeholders on affordable housing program updates.
- Changed program policy for HQS enforcement; reducing the amount of time a unit can remain on abatement before the family has to relocate to a new unit.
- Changed program operations to issue debit cards to all program participants who receive utility reimbursement payments, to reduce program cost.
- MHA proposes to implement recertifying a select population (Fixed Income participants) every two years. This practice is addressed in HUD's Streamlining PIH Notice of 2016 to reduce administrative costs, as well as, to reduce inconvenience to residents and increases operational efficiency.
- MHA will look to implement recertifying every two years. This reduces inconvenience to residents and increases operational efficiency.
- MHA staff is prepared to provide HCV relocation services to Smiley residents upon approval of the demolition application and relocation vouchers.
- Changed program operations to issue mortgage payments directly to current Homeownership participants.
- MHA staff is updating Administrative Plan to include updated PIH Notices and best practices to optimize program utilization and operational efficiency.

Improve Living Environment for Public Housing Residents

Progress:

- Continues to increase collaboration with the MPD. Community Police are providing weekly park, walk and talk at all communities and attend monthly community meetings. This will empower residents to take ownership of their communities.
- MHA has installed Security cameras at Public Housing sites. This serves as a deterrent to criminal activities and provides the MPD additional tools in policing housing communities.
- MHA will conduct and implement recommendations from a 2018 Energy Audit to promote energy efficiency.
- MHA has completed the file scan for all public housing documents and continued the utilization of this process.

Promotion of Self-Sufficiency

Progress:

- Currently, 198 families are participating in the combined Family Self-Sufficiency FSS program.
- MHA continues to distribute interest forms to participants wanting to know more about the FSS program at the HCV new admission and transfer briefings. A follow-up contact was scheduled with all interested participants.
- FSS Coordinators work with participants individually to assist them with job search and scheduling interviews. MHA works very closely with the Career Center and LEAD Staffing to link residents/participants to employment opportunities.
- The Montgomery Housing Authority continues to maintain a partnership with several local agencies and organizations to assist residents with becoming self-sufficient. Available services include assistance with

job readiness, employment searching, credit repair/rebuilding, money management, job training, education, and homeownership.

- Homeownership seminars are offered throughout the year to educate residents on the home buying process and the advantages of owning a home. Sessions covered included: HCV Homeownership program; the importance of credit scores; money management/budgeting; what to look for in a home; down payment assistance; equity and closing cost.
- The FSS Program continues to host Financial Literacy workshops throughout the year to educate residents on saving money and improving their credit to become eligible for mortgage loans with the lowest interest rates.

Ensuring Equal Opportunity and Affirmatively furthering Fair Housing

Progress:

The MHA has maintained, in the waiting room, a bulletin board, which accommodate the following posted materials:

1. Statement of Policies and Procedures governing the HCV Administrative Plan and the Public Housing ACOP.
 2. Open Occupancy Notice (applications being accepted and/or not accepted)
 3. Income limits for Admission
 4. Utility Allowances
 5. Informal Review and Hearing Procedures
 6. Fair Housing Poster
 7. "Equal Opportunity in Employment" Poster
- As part of the briefing process, the MHA has provided information to applicant families, about civil rights requirements and the opportunity to rent in a broad range of neighborhoods.

Mixed-Finance Housing Development Plan

Progress:

The Plaza at Centennial Hill (formerly Victor Tulane Court)

- Victor Tulane Court Phase Redevelopment, now known as The Plaza at Centennial Hill, was approved by the U.S. Department of Housing and Urban Development (HUD) on March 28, 2012. Phase I is comprised of 129 dwelling units and was completed in 2013. Phase II consisted of 129 dwelling units and was completed in July 2016. MHA is currently master planning Phase III to be self-developed by MHA, for an additional 40 public housing units utilizing MHA operating reserves, escrow funds, and/or Capital Funds. MHA intends to make an OFFP submission and development/site acquisition proposal to HUD in 2018. Construction is expected to commence in 2019.

Columbus Square (formerly Trenholm Court)

- The second property scheduled for new construction using the mixed-finance model is the former Trenholm Court. The MHA received approval from HUD and the Special Applications Center to demolish Trenholm Court in 2011. MHA and its developer partner applied for and received a 9% tax credit allocation from the Alabama Housing Finance Authority (AHFA) in June 2015 for Phase I and June 2017 for Phase II. Phase I and Phase II of Columbus Square will comprise of 80 units in each phase. Construction is complete on Phase I and fully occupied. Phase II construction is underway and scheduled to be complete by December 2019. MHA expects its developer partner to submit a 9% tax credit application for Phase III in early 2019.

Smiley Court and Patterson Court

- MHA issued a RFP for a private developer partner to redevelop Smiley Court off-site through new construction and/or acquisition/rehab in 2018. MHA expects to select a developer partner, execute a Master Developer Agreement and commence initial master planning for the first off-site phase in 2019.
- MHA issued a RFP for a private developer partner to reposition Patterson Court and redevelop additional affordable housing units at off-site locations in 2018. Patterson Court redevelopment is expected to follow Smiley Court's redevelopment on the overall schedule at this time.

Development Team

Progress:

The Authority plays a significant role in each mixed-finance development and responsible for overall project success. This approach allows the agency to build its development skills and replicate the process in future development projects.

The development team is comprised of the following:

- Executive Director
- Financial Consultant
- Development Partner
- Architect and Engineer
- General Contractor
- Environmental Consultant
- Mixed-finance Legal Counsel
- Market Analyst
- Director of Real Estate Development
- Program Manager

Schedule & Financing

Progress:

The Director of Real Estate Development works closely with MHA's financial and development consultants and the developer to create a comprehensive schedule for the redevelopment of Columbus Square and the final phase of development at The Plaza at Centennial Hill. The redevelopment schedule for Columbus Square is heavily dependent upon the award of Low Income Housing Tax Credits (LIHTC) while The Plaza at Centennial Hill Phase III will be self-developed by MHA through OFFP funds.

MHA has sufficient sources to complete the redevelopment of Tulane Court/The Plaza at Centennial Hill and continue the redevelopment at Trenholm Court/ Columbus Square. MHA realized a share of the developer fee from each phase of the redevelopment at both Tulane Court and Trenholm Court. The Authority provided a ground lease to the partnership formed to own the improvements at each phase of the housing developments. The MHA development partners provided necessary financial guarantees.

Program Characteristics and Next Steps

Progress:

MHA is committed to utilizing its public assets to improve the quality of life and economic health of its residents as well as community neighborhoods. The Victor Tulane Court property was recognized by the City of Montgomery as an "opportunity site" in the Downtown Master Plan. MHA's vision for this redevelopment is to

create a community where people of different economic strata, races, and cultures will live, learn, work, and raise families in close proximity to abundant employment, retail and cultural opportunities.

The Authority is committed to expanding its presence in the affordable housing community and going beyond the bounds of a traditional HUD-subsidized public housing. MHA realizes that there is a substantial demand for not only housing at this income level but also for workforce housing and subsidized, service-enriched housing for the elderly. Having studied models of other public housing authorities in communities across the country that have become agents of change in those cities, MHA plans to play a significant role in the revitalization of the City of Montgomery.

The Authority has worked with city planners to ensure that the new developments are in line with the City's Downtown Master Plan and the recent redevelopment study of Centennial Hill, the historically significant neighborhood of which the Plaza at Centennial Hill (formerly Victor Tulane Court) is a part.

MHA requires that development, design, construction and long-term operations of the project is environmentally sound, resource efficient, and respectful of the physical, historical and cultural traditions of the prospective residents and surrounding neighborhoods. Low-income housing tax credits (LIHTC) is vital to the success of this project; the Authority must adhere to standards outlined in the most recent Qualified Allocation Plan ("QAP") from the Alabama Housing Finance Authority (AHFA). MHA and its development partner also ensure that the following development values are represented in the redevelopment program of Tulane and Columbus Square:

- Creation of rental units indistinguishable, in quality and visual appearance, from rental units for other levels of income in developments that are contiguous and integrated into the larger community.
- Maximization of public and affordable housing opportunities for residents.
- Maximization of the use of private financing to minimize the investment of limited MHA resources.
- Establishment of a vehicle to engage residents of all income levels and backgrounds, local institutions and other stakeholders in the revitalization effort.
- Creation of employment and business opportunities for public housing residents, resident-owned businesses, and other minority/women-owned businesses that provide bona-fide commercial value to the project, such that residents and businesses build skills and experience in working with MHA related development projects that can be valuable in non-MHA related work.
- Reflection of architectural and urban design standards of Montgomery neighborhoods, recognizing applicable cost limitations.
- Enhancement of the professional knowledge, skills and ability of the MHA development, financial and management staff.
- Involvement of the community and potential residents throughout the development process and Montgomery Housing Authority.
- Use of the principles of New Urbanism whenever feasible to establish an environmentally affable community that promotes diverse, compact, vibrant, mixed-use communities.

In addition to the redevelopment projects listed above, the Housing Authority also investigates the feasibility to add more affordable housing units to its portfolio through acquisition and rehab and/or new construction projects, through joint public, private partnerships. Multiple sites are currently under review for financial feasibility.

Other efforts currently under review include project-basing vouchers under the Housing Choice Voucher program, in conjunction with property acquisitions and new construction efforts to increase the supply of affordable housing

in Montgomery. These efforts may also include issuing an RFP for project basing vouchers through joint partnerships with the private sector to the extent such partnerships would benefit the MHA and create additional revenue streams for the agency.

In regards to the demolition and disposition activities planned for the upcoming year, MHA intends to:

- A Smiley Court relocation plan has been created to ensure the transition will be an effortless process for the residents.
- Acquisition Rehab and/or new construction will be considered for the redevelopment process at off-site locations for Smiley Court.
- MHA may seek approval for the demolition/disposition of Patterson Courts and potential off-site acquisition/rehab and/or new construction.
- MHA will submit additional disposition amendments as necessary for Phases III and IV of the former Trenholm Court for development activities.
- MHA may seek approval for the demolition/disposition of Patterson Courts and potential off-site acquisition/rehab and/or new construction.

Finally, MHA previously received disposition approval from HUD for the sale of the Cedar Park property. This property is the former site of 230 public housing units that were previously demolished in 2003. The Housing Authority intends to work with the non-profit community to discuss using the property for a commensurate public benefit.