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| Annual PHA Plan <i>(Standard PHAs and Troubled PHAs)</i> | U.S. Department of Housing and Urban Development Office of Public and Indian Housing | OMB No. 2577-0226 Expires: 03/31/2025 |
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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-ST is to be completed annually by **STANDARD PHAs or TROUBLED PHAs**. PHAs that meet the definition of a High Performer PHA, Small 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 (SEMAP) assessments if administering both programs, or PHAS if only administering public housing.
- (2) **Small PHA** - A PHA that is not designated as PHAS or SEMAP 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 SEMAP 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 SEMAP assessments.
- (5) **Troubled PHA** - A PHA that achieves an overall PHAS or SEMAP 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 SEMAP troubled.

| A. | PHA Information. | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| A.1 | <p> PHA Name: <u>Housing Authority of the City of Fort Myers</u> PHA Code: <u>FL047</u> PHA Type: <input checked="" type="checkbox"/> Standard PHA <input type="checkbox"/> Troubled PHA PHA Plan for Fiscal Year Beginning: <u>(04/2025):</u> _____ PHA Inventory (Based on Annual Contributions Contract (ACC) units at time of FY beginning, above) Number of Public Housing (PH) Units <u>864</u> Number of Housing Choice Vouchers (HCVs) <u>2797</u> Total Combined Units/Vouchers <u>3661</u> PHA Plan Submission Type: <input checked="" type="checkbox"/> Annual Submission <input type="checkbox"/> Revised Annual Submission </p> <p> Availability of Information. 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. 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. </p> <p> PHA Plan, PHA Plan Elements, and Public Hearing Information can be found at the following locations: <ol style="list-style-type: none"> 1) Housing Authority Administrative Office, 4224 Renaissance Preserve Way, Fort Myers, FL 33916 2) Royal Palm Tower 2424 Edwards Avenue Fort Myers, FL 33901 3) Horizons Apartments 5360 Summerlin Road Fort Myers, FL 33919 4) Renaissance Preserve Family 4211 Othello Lane Fort Myers, FL 33916 5) The Landings at East Point 1701 Nelson Tillis Boulevard Fort Myers, FL 33916 6) East Point Place 3501 Dale Street Fort Myers, FL 33916 </p> <p> <input type="checkbox"/> PHA Consortia: (Check box if submitting a Joint PHA Plan and complete table below) </p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th rowspan="2" style="width: 20%;">Participating PHAs</th> <th rowspan="2" style="width: 10%;">PHA Code</th> <th rowspan="2" style="width: 20%;">Program(s) in the Consortia</th> <th rowspan="2" style="width: 20%;">Program(s) not in the Consortia</th> <th colspan="2" style="width: 30%;">No. of Units in Each Program</th> </tr> <tr> <th style="width: 15%;">PH</th> <th style="width: 15%;">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> | 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: | | | | | | | | | | | | | | | | | |
| 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. | Plan Elements |
| B.1 | <p>Revision of Existing 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 type="checkbox"/> <input checked="" type="checkbox"/> Financial Resources.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Rent Determination. HOTMA</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Operation and Management.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Grievance Procedures.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Homeownership Programs.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Community Service and Self-Sufficiency Programs.</p> <p><input checked="" type="checkbox"/> <input 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> <ul style="list-style-type: none"> • The rent determination under HOTMA regulations allows for the Authority to wait until the next annual reexamination when a household has an increase in income. • Operations and management for Renaissance Preserve LLP I, II, III, & IV, East Pointe Place I, & The Landings at East Pointe are being managed by NDC Asset Management, effective August 1, 2024. • The Homeownership Voucher Program Addendum adds language that allows exemption from 15 year maximum for elderly or disabled households. • Safety and Crime Prevention: Contract with Fort Myers Police Department, placed cameras at the Landings at East Pointe • Pet Policy ACOP adds verbiage for service animals <p>(c) The PHA must submit its Deconcentration Policy for Field Office review.</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 type="checkbox"/> <input checked="" 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 Rental Assistance or Project-Based Vouchers under RAD.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Conversion of Tenant Protection Vouchers to Project-Based Vouchers</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 type="checkbox"/> <input checked="" type="checkbox"/> Project-Based Vouchers.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Units with Approved Vacancies for Modernization.</p> <p><input type="checkbox"/> <input checked="" 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> |
| B.3 | <p>Progress Report.</p> <p>The PHA continues to provide quality housing that is affordable to the low, very low, and extremely low-income households. Strategies pursued by the PHA as outlined in the 5 year PHA plan continue to be successful and allow the authority to meet our Mission to promote adequate and affordable housing, economic opportunities, and a suitable living environment free from discrimination.</p> |

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| B.4 | <p>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.</p> <p>The most recent HUD 5-year plan was approved in EPIC on 11/17/2023</p> |
| B.5 | <p>Most Recent Fiscal Year Audit.</p> <p>(a) Were there any findings in the most recent FY Audit?</p> <p>Y N <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>(b) If yes, please describe:</p> <ul style="list-style-type: none"> • Housing Voucher Cluster had one finding: Eligibility: Material Weakness in Internal Control & Material Noncompliance • Public and Indian Housing had one finding: Eligibility: Material Weakness in Internal Control & Material Noncompliance |
| <p>C. Other Document and/or Certification Requirements.</p> | |
| C.1 | <p>Resident Advisory Board (RAB) Comments.</p> <p>(a) Did the RAB(s) have comments to the PHA Plan?</p> <p>Y N <input type="checkbox"/> <input checked="" type="checkbox"/></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.</p> |
| C.2 | <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> |
| C.3 | <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-ST-HCV-HP, <i>PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p> |
| C.4 | <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?</p> <p>Y N <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>If yes, include Challenged Elements.</p> |
| C.5 | <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> |

D. Affirmatively Furthering Fair Housing (AFFH).

D.1 Affirmatively Furthering Fair Housing (AFFH).
 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.

Fair Housing Goal:

Fair Housing Goal 1:

Address the demand for housing needs while addressing aging housing infrastructure

Describe fair housing strategies and actions to achieve the goal

Strategy for Addressing Housing Needs

Housing Authority of the City of Fort Myers (HACFM) is currently redeveloping and rehabilitating several properties across Lee County, Florida. The properties will include updated facilities and amenities for its residents and are located in areas where residents will have functional accessibility to public transportation, healthcare facilities, schools, parks, grocery stores, and other services. HACFM has expanded its Real Estate and Development Department and will retain the services of a public housing resident relocation provider to assist residents facing relocation needs. With the assistance of resident relocation provider, our in-house real estate and development team, and our Community Supportive Services department, the HACFM wants to ensure that residents are supported and protected, and to minimize the impact during the relocation period.

Fair Housing Goal 2:

To educate developers and landlords on the benefits and incentives of the Housing Choice Vouchers in order to address the factors that deter providers from participating in the program.

Describe fair housing strategies and actions to achieve the goal:

HACFM is a community partner with the Collaboratory and its Home Coalition network, which is comprised of different stakeholders from the public and private sector. The Home Coalition is a collaborative effort to meet the coalitions’ goal to “ensure 80% of people in Southwest Florida (“SWFL”) have access to housing and transportation that cost less than 45% of their income by 2040.” Through this partnership and working group HACFM looks to further their education efforts of prospective landlords in the Housing Choice Voucher. Further, demystify Section 8 participation and the pivotal role the program has in providing affordable housing individuals and families across diverse communities in SWFL.

HACFM Housing Choice Voucher program holds a landlord meeting every 2nd Thursday of the month as part of their landlord outreach efforts to increase the landlords in the area that are willing to participate in the Housing Choice Program. HACFM has conducted presentations and is collaborating with the Realtors Association and 21 Century to increase the utilization of vouchers in the area. This allows the Housing Choice Voucher program

Fair Housing Goal 3:

Increase awareness and participation in HCV Homeownership program.

Describe fair housing strategies and actions to achieve the goal:

HACFM conducted a Homebuyers Summit in collaboration with realtors, lenders, and non-profit organizations to provide a one-stop pathway to homeownership event for voucher holders and community residents. HACFM has set a goal to conduct the Homebuyers Summit 2 times a year in hopes to increase the number of enrolled participants in its HCV Homeownership program.

Instructions for Preparation of Form HUD-50075-ST Annual PHA Plan for Standard and Troubled PHAs

A. PHA Information. All PHAs must complete this section. (24 CFR §903.4)

A.1 Include the full **PHA Name**, **PHA Code**, **PHA Type**, **PHA Fiscal Year Beginning** (MM/YYYY), **PHA Inventory**, **Number of Public Housing Units and or Housing Choice Vouchers (HCVs)**, **PHA Plan Submission Type**, and the **Availability of Information**, specific location(s) of all information relevant to the public hearing and proposed PHA Plan. ([24 CFR §903.23\(4\)\(e\)](#))

PHA Consortia: Check box if submitting a Joint PHA Plan and complete the table. ([24 CFR §943.128\(a\)](#))

B. Plan Elements. All PHAs must complete this section.

B.1 Revision of Existing PHA Plan Elements. PHAs must:

Statement of Housing Needs and Strategy for Addressing Housing Needs. The Housing Authority of the City of Fort Myers (HACFM) identifies the needs of the extremely low income, very-low income, low-income, elderly, and disabled families. HACFM will utilize a variety of financial repositioning programs including the Rental Assistance Demonstration Program, Section 18 Demolition and Disposition, Housing Choice Vouchers (HCV), Project-Based Vouchers (PBV), or project-based rental assistance (PBRA) implemented by HUD in 2012, to rehabilitate some of the existing public housing portfolio without largely relying on federal funding. The program authorizes public housing authorities (PHAs) to convert their existing public housing units to project-based voucher assistance units. PHAs are then able to utilize private market financing tools, such as low-income housing tax credits and multifamily housing bonds to substantially renovate their public housing portfolios.

The HACFM previous ambitious plan to convert its public housing portfolio using the HOPE VI was widely successful for the replacement of outdated developments. This process will continue as we address the Repositioning of our remaining Public Housing Developments using the Choice Neighborhoods and other strategic planned measures to leverage public/private funds for the repositioning and redeveloping of the Public Housing remaining.

HACFM is aware renters have the most severe housing cost burdens, especially at the lowest income levels - extremely low and very low - income families - as well as elderly and disabled families. Citywide, there are approximately 14,121 low-income households. According to the 2019 US Census statistics, 20.6% of the Fort Myers Community live below the poverty level. The jurisdiction has a shortfall in affordable units for very low and extremely low-income households, with many very low-income individuals paying over 50% of their income for housing. There is a significant shortage of affordable rental housing in the jurisdiction.

Therefore, HACFM is partnering with the City to explore public funds collaboratively that leverages private sector investment, as well as encourage a high degree of community support and engagement.

Our initial goal is to:

- Engage the community to make affordable housing a citywide priority
- Reduce the number of public housing vacancies
- Increase voucher utilization
- Utilize the Rental Assistance Demonstration Program to convert public housing to project-based assistance
- Leverage private and public funds including LowIncome Tax Credits to create new senior and multifamily units The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. ([24 CFR §903.7\(a\)\(2\)\(i\)](#)) Provide a description of the ways in which the PHA intends, to the maximum extent practicable, to address those housing needs in the upcoming year and the PHA's reasons for choosing its strategy. ([24 CFR §903.7\(a\)\(2\)\(ii\)](#))

Rent Determination. On July 29, 2016, HOTMA was signed into law. HOTMA makes numerous amendments to Sections 3, 8, and 16 of the United States Housing Act of 1937 (1937 Act), including significant changes to income calculation, net family assets, and income reviews.

HUD finalized HOTMA rulemaking in 2023 to put Sections 102, 103, and 104 into effect through revisions to HUD's regulations found in 24 CFR Part 5 and 24 CFR Part 891.

Section 102 address income reviews, including the frequency of income reviews and revise the definitions of income and assets.

Section 103 is not applicable to multifamily housing programs.

Section 104 sets asset limits for both Section 8 Project-Based Rental Assistance and Section 202/8 programs.

The final rule is effective on June 1, 2025, and our policies are updated to accommodate these required changes.

Operation and Management. Both the ACOP and Administrative Plan have been updated to include all HOTMA Provisions for implementation on the effective date. (Policies attached).

Significant Amendment/Modification. In accordance with HUD regulations in 24 CFR 903.7 © and CFR 905.3, HACFM has defined below the basic criteria that will be used for determining: (i) substantial deviation from its 5-year plan; (ii) significant amendment or modification to the 5-year and annual PHA plans; and (iii) significant amendment or modification to the capital plan.

The HACFM hereby defines "substantial deviation" and "significant amendment/modification" as any change in policy which significantly and substantially alters the Authority's stated mission and the persons the Authority serves. This would include admissions preferences, demolition and/or disposition activities, and conversion programs. Discretionary or administrative amendments consistent with the Authority's stated overall and basic objectives will not be considered substantial deviations or significant modifications. If a significant amendment and/or substantial deviation/modification occur, the public process will include consultation with the Resident Advisory Board, a public comment period, public notification of where and how the proposed change can be reviewed, and the approval by the Housing Authority Boards.

The Housing Authority of the City of Fort Myers is also including its definition of substantial deviation to the PHA Plan to include the following language: Significant Amendment Definition as part of Housing Conversion Activities, Housing Authority of the City of Fort Myers is redefining the definition of a substantial deviation from the PHA Plan exclude the following specific items: a. The decision to convert to Project Based Voucher Assistance; b. Changes to the Capital Fund Budget produced as a result of each approved Housing Conversion, regardless of whether the proposed conversion will include use of additional Capital Funds; c. Changes to the construction and rehabilitation plan for each approved housing conversion; and d. Changes to the financing structure for each approved housing conversion.

B.2 New Activities. If the PHA intends to undertake any new activities related to these elements in the current Fiscal Year, mark “yes” for those elements, and describe the activities to be undertaken in the space provided. If the PHA does not plan to undertake these activities, mark “no.”

HOPE VI or Choice Neighborhoods. In partnership with the City of Fort Myers and other local government agencies, the HACFM will be involved in implantation efforts for the recently awarded CNI Implementation grant during 2024. All implementations grant activities are outlines in the approved implementation plan.

Mixed Finance Modernization or Development. HACFM has set strategic priorities to transform its entire public housing portfolio into mixed-income communities over the next 3-5 years, to reposition the agencies public housing assets into better performing developments that are competitive in the marketplace as well as improve their physical and social conditions.

HACFM has been responsible for redevelopment challenged neighborhoods that have not been invested in and/or neglected for some time. HACFM and/or its subsidiary entity(s) plans to seek all available development opportunities and either partner with other developers or self-develop properties using HUD’s mixed-finance approach.

HACFM envisions a range of options that will be employed to achieve its goal to transform its portfolio which may include but not limited to: modernization of existing public housing units; demolition of selected units and construction of new units; introduction of market rate and for-sale units; acquisition and development of new units in, around and outside of HACFM properties and throughout Lee County; voluntarily conversion to project based assistance and wholesale redevelopment of its public housing communities.

HACFM may also decide to accumulate future grant funding and use it for the potential redevelopment of HACFM other public housing communities and/or for other projects under the mixed-finance development approach. Additional acquisitions of vacant land or other existing rental properties, adjacent to current public housing sites, and or in nearby areas, may also be initiated, subject to submission and approval by HUD of the appropriate development proposals.

Other mixed-finance transactions (via acquisition or new construction or both) may be proposed later in the plan year commensurate with HACFM future Strategic Business Plan.

HACFM plans to pursue public housing development activities and will utilize other subsidiary entities for development, financing, and the formation of variety of ownership structures as well as utilize subsidiary entities for the operation of public and non-public housing programs.

The Authority may choose to use Capital Funds, Low Income Housing Tax Credits (LIHTC) and other public and private funds to redevelop Southward Village, Bonair Towers and Horizons.

Demolition and/or Disposition. The HACFM may enter into a demolition/disposition agreement for Horizons and Southward Village Apartments.

This development has reached the end of its useful life and without significant amount of rehabilitation, which is beyond the financial ability of the Housing Authority to fund will fall further into disrepair. The intent of the HACFM is to demolish the property and to rebuild on the original footprint.

This acquired family site, is near the end of its useful life and the cost to maintain the property, especially following additional damage done by Hurricane Ian, far exceeds that capital funding available to the HACFM requiring and considering our Public Private Partnerships to address the deteriorating structures and potential replacement housing options. HACFM has been awarded a CNI grant and plans to submit for demolition/disposition applications to the Special Applications Center and request tenant protection vouchers to assist in each of the redevelopment plan.

B.3 Progress Report. For all Annual Plans following submission of the first Annual Plan, a PHA must include a brief statement of the PHA’s progress in meeting the mission and goals described in the 5-Year PHA Plan. ([24 CFR §903.7\(r\)\(1\)](#))

Goal 1: Maximize the current resources for housing programs

Progress: HACFM occupancy rate for 2024 was below 98% and while we annually assess our policies regarding the ACOP, work continues to be needed in increasing occupancy in the PH developments.

Goal 2: Increase the inventory of affordable housing units

Progress: HACFM has received additional Tenant Protection Vouchers for the replacement of SAC approved disposed properties including Bonair Towers (101), Royal Palm Towers (98), and half of the remaining Southward Village (155).

HACFM continues to evaluate the current remaining inventory to identify the best housing opportunities.

HACFM Has created a digital form to collect available voucher units for rental

Goal 3: Improve the Quality of Assisted Housing

Progress: HACFM has updated its ACOP to implement any new statutory or regulatory requirements and updated any existing regulations.

HACFM continues to work with our Section 3 coordinator to expand the resident training program with Section 3 opportunities.

HACFM is currently increasing staff training to minimize fraud.

HACFM is currently working on a Maintenance Plan that includes lead-based paint and mold abatement.

HACFM has provided all units that are federally assisted with carbon monoxide detectors.

Goal 4: Provide an improved living environment

Progress: HACFM provided security improvements to its public housing properties with increased lighting, video surveillance, and resident identification. HACFM has included in its plans disposed properties with update and/or new amenities. HACFM has been working with an elderly disabled service coordinator for supportive services to our elderly residents.

Goal 5: Encourage Self-Sufficiency

Progress: HACFM resident services has partnered with several community partners to assist in helping participants become economically independent including assistance with financial management. HACFM continues to market the FSS and Jobs Plus programs to residents through TAB, referrals, emails, website, telecommunication services, and community events. HACFM with the Section 3 Program, held meetings to get residents informed and interested in upcoming Section 3 opportunities.

Goal 6: Ensure equal opportunity and affirmatively further fair housing

Progress: HACFM continues to take affirmative measures to ensure that access to assisted housing is provided regardless of race, color, religion, national origin, sex, familial status, disability, sexual orientation, and gender identity. HACFM uses its current staffing and management to provide information and forms to individuals and families with limited English-speaking skills. HACFM continues to attend Fair Housing Training to ensure that fair housing efforts continue to be implemented.

Goal 7: Increase customer satisfaction

Progress: HACFM has transitioned to a paperless workspace and have on-line opportunities for residents to complete their annual recertifications and to pay their monthly rent. HACFM has installed a kiosk to automate the process of uploading documents for applications, recertifications, and interims. HACFM continues to regularly review HUD regulations, PIH notices and policies to adopt changes to reduce administrative costs, increase program efficiency, improve tenant benefits, and foster self-sufficiency.

B.4 Capital Improvements.

Capital Fund Program: Capital Fund Program (CFP) 5-Year Action Plan. Prior to implementing changes that meet such criteria, HACFM will submit for HUD's approval, a revised Plan(s) that meets full public process requirements including Resident Advisory Board review and consultation.

HACFM's criteria, as defined below, is applicable to all CFP components including Capital Fund Grants; Replacement Housing Factor (RHF) grants; Disaster Grants, Capital Fund Financing Program (CFFP) allocations; as well as any new or future formula components such as Demolition and Disposition Transitional Funding (DDTF).

- Criteria for defining "Substantial Deviation" from the 5-Year Plan:
 - A major change in the direction of HACFM pertaining to its mission and goals would constitute a "Substantial Deviation" from the Agency's 5-Year Plan.
 - Examples include the undertaking of new program activities, development strategies, or financing initiatives that do not otherwise further HACFM's stated mission and goals as articulated in the 5-Year Plan.
- Criteria for defining "Significant Amendment or Modification" to Capital Fund Program (CFP) 5-Year Action Plan:
 - Proposed demolition, disposition, home ownership, Capital Fund Financing, development, RAD conversions, or mixed finance proposals will be considered significant amendments to the CFP 5-Year Action Plan.
 - Additions of non-emergency work items not included in the current CFP Annual Statement or CFP 5-Year Action Plan that exceeds \$1 million.
- Exceptions:
 - Changes under the above definitions that are required due to HUD regulations, federal statutes, state or local laws/ordinances, or because of a declared national or local emergency will not be considered substantial deviation or significant amendment/modification.
 - Changes under the above definitions which are funded by any source other than federal funds will not require Plan amendment or modification.

HUD - 50075-HP Streamlined Annual PHA Plan CY 2025
Section B.1(a) Financial Resources

PHA Name: Housing Authority of the City of Fort Myers
 PHA Code: FL047

| Sources | Planned \$ | Planned Uses |
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| 1. Federal Grants (CY 2024 grants) | | |
| a) Public Housing Operating Fund | 3,792,485 | 3,792,485 |
| b) Public Housing Capital Fund | 2,500,000 | 2,500,000 |
| c) Housing Choice Voucher Funds | 27,640,133 | 27,640,133 |
| d) Resident Opportunity and Self Sufficiency Grant | 78,147 | 78,147 |
| e) Community Development Block Grant - DR | 24,567,741 | 24,567,741 |
| f) HOME | 0 | 0 |
| g) Choice Neighborhood | 2,289,187 | 2,289,187 |
| h) Other Federal Grants (list below) | | |
| | | |
| 2. Prior Year Federal Grants (unobligated funds only, list below) | | |
| 2022 Hazard Grant | 637,890 | 637,890 |
| 2023 CFP | 1,086,975 | 1,086,975 |
| 2024 CFP | 1,756,497 | 1,756,497 |
| 3. Public Housing Dwelling Rental Income | 250,000 | 250,000 |
| | | |
| 4. Other Income (list below) | | |
| HCVP Admin Fees | 2,566,967 | 2,566,967 |
| 5. Non-federal sources (list below) | | |
| Investments | 159,101 | 159,101 |
| Tenant - Other | 0 | 0 |
| Total Resources | 67,325,123 | 67,325,123 |

C. Other Document and/or Certification Requirements.

C.1 Resident Advisory Board (RAB) comments. HACFM met with all RAB Board Members and HACFM Resident Councils.

- No Comments were received on the Annual Plan, as most of the changes addressed in the Annual Plan were discussed throughout the year in Resident Council Meetings.
- HACFM held the 5-Year Capital Improvement Plan Meeting on November 13, 2024.

C.2 Certification by State of Local Officials. 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. (24 CFR §903.15). Note: A PHA may request to change its fiscal year to better coordinate its planning with planning done under the Consolidated Plan process by State or local officials as applicable.

C.3 Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan. Provide a certification that the following plan elements have been revised, provided to the RAB for comment before implementation, approved by the PHA board, and made available for review and inspection by the public. This requirement is satisfied by completing and submitting form HUD-50077 ST-HCV-HP, *PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed*. Form HUD-50077-ST-HCV-HP, *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. This includes all certifications relating to Civil Rights and related regulations. A PHA will be considered in compliance with the certification requirement to affirmatively further fair housing if the PHA fulfills the requirements of §§ 903.7(o)(1) and 903.15(d) and: (i) examines its programs or proposed programs; (ii) identifies any fair housing issues and contributing factors within those programs, in accordance with 24 CFR 5.154 or 24 CFR 5.160(a)(3) as applicable; (iii) specifies actions and strategies designed to address contributing factors, related fair housing issues, and goals in the applicable Assessment of Fair Housing consistent with 24 CFR 5.154 in a reasonable manner in view of the resources available; (iv) works with jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement; (v) operates programs in a manner consistent with any applicable consolidated plan under 24 CFR part 91, and with any order or agreement, to comply with the authorities specified in paragraph (o)(1) of this section; (vi) complies with any contribution or consultation requirement with respect to any applicable AFH, in accordance with 24 CFR 5.150 through 5.180; (vii) maintains records reflecting these analyses, actions, and the results of these actions; and (viii) takes steps acceptable to HUD to remedy known fair housing or civil rights violations. impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with the local jurisdiction to implement any of the jurisdiction's initiatives to affirmatively further fair housing; and assures that the annual plan is consistent with any applicable Consolidated Plan for its jurisdiction. (24 CFR §903.7(o)).

C.4 Challenged Elements. If any element of the Annual PHA Plan or 5-Year PHA Plan is challenged, a PHA must include such information as an attachment to the Annual PHA Plan or 5-Year PHA Plan with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.

C.5 Troubled PHA. If the PHA is designated troubled, and has a current MOA, improvement plan, or recovery plan in place, mark "yes," and describe that plan. Include dates in the description and most recent revisions of these documents as attachments. If the PHA is troubled, but does not have any of these items, mark "no." If the PHA is not troubled, mark "N/A." (24 CFR §903.9)

D. Affirmatively Furthering Fair Housing (AFFH).

D.1 Affirmatively Furthering Fair Housing. The PHA will use the answer blocks in item D.1 to provide a statement of its strategies and actions to implement each fair housing goal outlined in its accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5) that states, in relevant part: "To implement goals and priorities in an AFH, strategies and actions shall be included in program participants' ... PHA Plans (including any plans incorporated therein) ... Strategies and actions must affirmatively further fair housing" Use the chart provided to specify each fair housing goal from the PHA's AFH for which the PHA is the responsible program participant – whether the AFH was prepared solely by the PHA, jointly with one or more other PHAs, or in collaboration with a state or local jurisdiction – and specify the fair housing strategies and actions to be implemented by the PHA during the period covered by this PHA Plan. If there are more than three fair housing goals, add answer blocks as necessary.

Until such time as the PHA is required to submit an AFH, the PHA will not have to complete section D., nevertheless, the PHA will address its obligation to affirmatively further fair housing in part by fulfilling the requirements at 24 CFR 903.7(o)(3) enacted prior to August 17, 2015, which means that it examines its own programs or proposed programs; identifies any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement; and maintain records reflecting these analyses and actions. Furthermore, under Section 5A(d)(15) of the U.S. Housing Act of 1937, as amended, a PHA must submit a civil rights certification with its Annual PHA Plan, which is described at 24 CFR 903.7(o)(1) except for qualified PHAs who submit the Form HUD-50077-CR as a standalone document.

This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937, as amended, which introduced the 5-Year and Annual PHA Plan.

Public reporting burden for this information collection is estimated to average 7.52 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

Privacy Act Notice. The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality.

Public Housing and Housing Choice Voucher Program List of Discretionary Policies to Implement HOTMA

| Topic | Related HOTMA Policy Background | HOTMA Discretionary Policies These are policy choices that PHAs need to make and include in their ACOPs or Admin Plans. | HACFM Policy |
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| Hardship Exemptions for Health/Medical Care Expenses & Reasonable Attendant Care & Auxiliary Apparatus Expenses – General Relief (24 CFR § 5.611(c)(2)) | N/A | <ul style="list-style-type: none"> • PHAs must develop written policies in their ACOPs or Admin Plans defining what constitutes a hardship for the purposes of the general relief hardship exemption for health and medical care expenses and reasonable attendant care & auxiliary apparatus expenses. • PHAs may, pursuant to their own discretionary policy, extend the hardship relief for one or more additional 90-day periods while the family’s hardship condition continues. | <p>ACOP & ADMIN</p> <p>The family may request an extension either orally or in writing prior to the end of the hardship exemption period. The PHA will extend relief for an additional 90-days if the family demonstrates to the PHA’s satisfaction that the family continues to qualify for the hardship exemption based on circumstances described above. The PHA will require updated verification based on the family’s current circumstances</p> |
| Hardship Exemptions for Health/Medical Care Expenses & Reasonable Attendant Care & Auxiliary Apparatus Expenses – Phased-In Relief (24 CFR § 5.611(c)(1)) | <p>All families who received a deduction for unreimbursed health and medical care and/or reasonable attendant care or auxiliary apparatus expenses based on their most recent income review prior to January 1, 2024, will begin receiving the annual or interim reexamination, whichever occurs first on or after the date the PHA complies with HOTMA.</p> | | <p>ACOP & ADMIN</p> <p>Phased-In Relief</p> <p>The first category is applicable to all families who received a deduction for unreimbursed health and medical care and/or reasonable attendant care or auxiliary apparatus expenses based on their most recent income review. The family must receive phased-in relief if they are determined to be eligible. These families will begin receiving a 24-month phased-in relief at their next annual or interim reexamination, whichever occurs first.</p> <p>For these families, the threshold amount is phased-in as follows:</p> <ul style="list-style-type: none"> • The family is eligible for a deduction totaling the sum of expenses that exceeds 5 percent of annual income for the first 12 months. • At the conclusion of 12 months, the family is eligible for a deduction totaling the sum of their expenses that exceed 7.5 percent of annual income for another 12 months. • At the conclusion of 24 months, the standard threshold amount of 10 percent would be used, unless the family qualifies for relief under the general hardship relief category. <ul style="list-style-type: none"> - When an eligible family’s phased-in relief begins at an interim reexamination, the PHA will need to process another transaction one year later to move the family along to the next |

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| | | | phase. The transaction can be either an interim reexamination if triggered, or a non-interim reexamination transaction. |
| Hardship Exemption to Continue Child Care Expense Deduction (24 CFR § 5.611(d)) | <p>PHAs must develop written policies to define what constitutes a hardship, which includes the family's inability to pay rent, for the purposes of the childcare expense hardship exemption.</p> <p>PHAs must include this policy in their ACOPs or Admin Plans.</p> <p>PHAs must obtain third-party verification of the family's inability to pay rent or must document in the file with the reason third-party verification was not available.</p> | <p>PHAs must develop written policies to define what constitutes a hardship, which includes the family's inability to pay rent, for the purposes of the childcare expense hardship exemption.</p> <p>PHAs must include this policy in their ACOPs or Admin Plans.</p> <p>PHAs may, pursuant to their own discretionary policy, extend the relief for one or more additional 90-day periods while the family's hardship condition continues.</p> <p>PHAs must include in their ACOPs or Admin Plans whether they will allow extensions of the 90-day hardship period and the maximum number of 90-day extension periods (if establishing a maximum policy) that a family may receive.</p> <p>Note: PHAs are not limited by HUD to a maximum number of 90-day extensions</p> | <p>ACOP & ADMIN</p> <p>The HACFM defines this hardship as a potential decrease in income or increase in other expenses that would result from the loss of the childcare expense and such loss would impact the family's ability to pay their rent</p> <p><u>HACFM Policy</u></p> <p>The family may request an extension either orally or in writing prior to the end of the hardship exemption period. The HACFM will extend relief for an additional 90-days if the family demonstrates to the HACFM's satisfaction that the family continues to qualify for the hardship exemption based on circumstances described above. The family must provide updated verification based on the family's current circumstances. Additional extension(s) may be granted on a case-by-case basis provided the family continues to request extensions prior to the end of each hardship exemption period. Families must report if the circumstances that made the family eligible for the hardship exemption are no longer applicable. At any time, HACFM may terminate the hardship exemption if it is determined that the family no longer qualifies for the exemption.</p> |
| De Minimis Errors in Income Determinations (24 CFR §§ 5.609(c)(4); 960.257(f); 982.516(f); 882.515(f); 882.808(i)(5)) | <p>PHAs must take corrective action to creditor repay a family if the family was overcharged tenant rent because of de minimis errors in calculating family income.</p> <p>PHAs may not implement local policies to require families to repay in instances resulting in a family being undercharged for rent where the PHA miscalculated the family's income.</p> | <p>PHAs must include in their ACOPs or Admin Plans how they will repay or credit a family the amount that the family was overcharged retroactive to the effective date of the action the error was made, regardless of the dollar amount associated with the error, because of the PHA's de minimis error in income determination.</p> | <p>ADMIN & ACOP</p> <p><u>HACFM Policy</u></p> <p>The HACFM will reimburse a family for any family overpayment of rent, regardless of whether the overpayment was the result of staff-caused error, staff program abuse, or a de minimis error. This will be paid through direct-debit.</p> |
| Interim Reexaminations - Reporting Changes & Effective Date (24 CFR §§ 960.257(b)(4); | <p>Families must report household composition changes and changes to adjusted income consistent with HOTMA requirements; however, PHAs determine the timeframe in which reporting must occur to be considered "timely</p> | <p>PHAs must develop policies that describe when and under what conditions families must report changes in household composition and adjusted income consistent with HUD's requirements for processing an interim reexamination or other non-interim reexamination transaction.</p> | <p>ADMIN & ACOP</p> <p>The HACFM will not process interim reexaminations for income increases that result in less than a 10 percent increase in annual adjusted income.</p> <p>The HACFM will not perform an interim reexamination when a family reports an increase in income (whether earned or unearned income) within three months of their annual reexamination effective date.</p> |

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| <p>982.516(d); 882.515(b)(1) - (4); 882.808(i)(4); 891.410)</p> | <p>If the PHA has adopted a retroactive rent decrease policy, it may not be applied prior to the later of:</p> <p>The 1st of the month following the date of the actual decrease in income; or</p> <p>The 1st of the month following the most recent previous income examination.</p> <p>Note: The PHA must clearly communicate to the family and owner, if applicable, how a retroactive adjustment will affect the family's responsibility for rent.</p> | <ul style="list-style-type: none"> ● PHAs have the discretion to develop specific reporting policies that describe which changes must be reported and the timeline for reporting the change to be considered timely. ● PHAs may adopt a policy to apply rent decreases retroactively and establish additional criteria to describe the conditions under which retroactive decreases will be applied e.g., extenuating circumstances that may inhibit timely reporting. ● PHAs must describe these policies in their ACOPs or Admin Plans. | <p>ADMIN & ACOP</p> <p>The family must notify HACFM of changes via email, in writing, or via online web-portal and provide requested documentation. Generally, the family will not be required to attend an interview for an interim reexamination. However, if HACFM determines that an interview is warranted, the family may be required to attend.</p> <p>Based on the type of change reported, HACFM will determine the documentation the family will be required to submit. The family must submit any required information or documents within 10 calendar days of receiving a request from HACFM. This time frame may be extended for good cause with HACFM approval. HACFM will accept required documentation by mail, fax, or in person. HACFM must complete the changes within 30 calendar days of receipt.</p> |
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